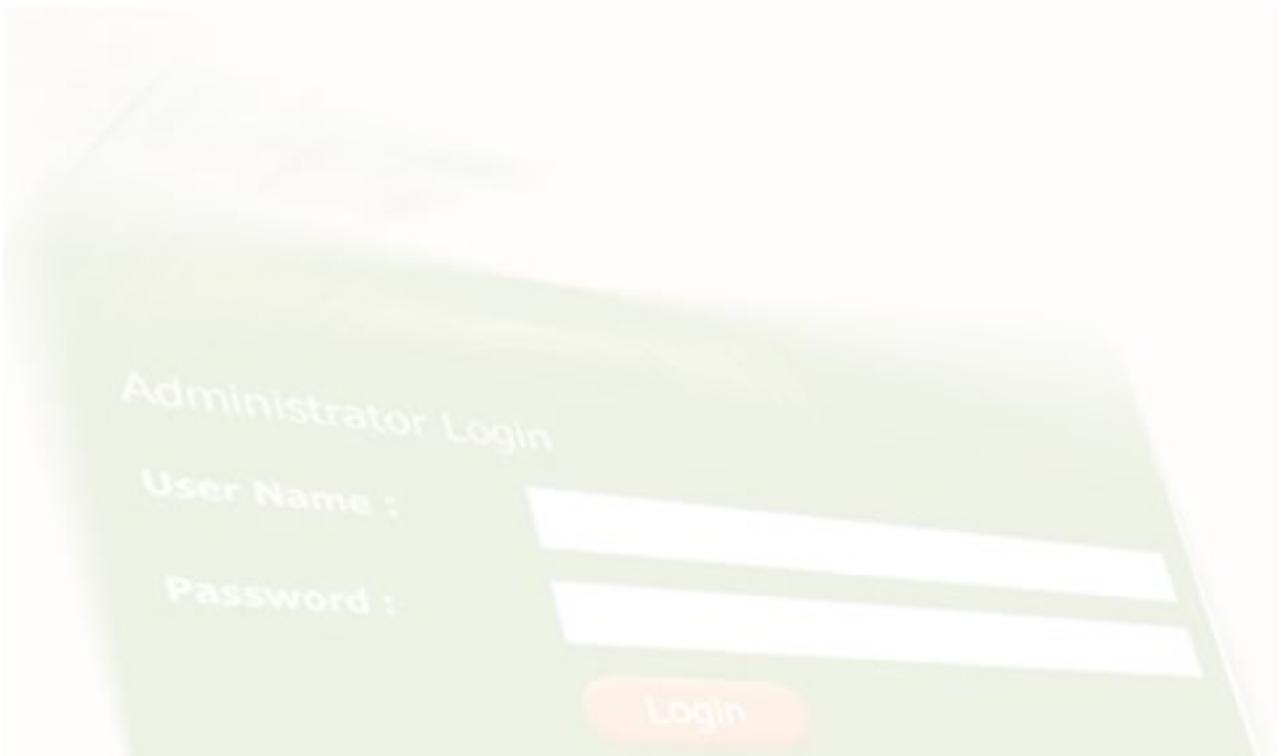


PROMOTION Module

Hosted Ecommerce Service Module Help Document

This module is installed on all stores by default under all hosting plans of hosted e-Commerce service as available at ecommercehosted.com



Introduction

Promotion Tools add-on module helps you to promote your business, feature your store, its sections and individual products. The module adds three major mechanisms to your online store, namely:

- special offers;
- bonus points;
- discount coupons.

This manual will guide you through the process of **Promotion Tools add-on module** configuration and use. This module comes pre-installed on all plans available at <http://www.ecommercehosted.com/> and cannot be uninstalled. It can only be ACTIVATED/DEACTIVATED and configured.

Configuring the Module

Accessible from Settings > Modules > Promotions in the admin area of your store.

Admin menu :: Modules :: Promotion settings

Module Promotion settings

Use this page to configure the "Promotion" module settings.
Complete the required fields below and press the "Update" button.

Bonus point purchasing capacity (\$ per bonus):

Bonus points awarded on each \$ of a purchase subtotal (bonus rate per \$; number of bonus points is rounded down to the next lower integer):

Show applicable special offers during checkout:

Allow discount coupons in customer zone:

The discounted price cannot be less than zero:

Offer application scheme to be used:

- Select this check box to combine special offers if multiple offers apply to an order.
- Leave the check box empty to apply only the most favorable special offer.

Number of discount coupons to be displayed per page in the admin zone:

Expand the list of orders, associated with discount coupons:

Review and configure the following settings:

- **Bonus point purchasing capacity:** this setting defines the bonus/\$ rate that must apply when a customer uses bonus points to pay in full or in part for a purchase he is making through your store (E.g.: '0.05' value means that 1 bonus point is equivalent to 5 cents).
- **Bonus points awarded on each \$ of purchase subtotal:** this setting specifies how many bonus points are to be awarded to a customer for each dollar of his purchase. Setting this option to '0' disables bonus point accumulation.
- **Show applicable special offers during checkout:** select this option if you want your customers to see applicable special offers during the checkout process.
- **Allow discount coupons in customer zone:** select this option to enable discount coupons, clear the check box to disable discount coupons.
- **The discounted price cannot be less than zero:** select this option to make sure that no special offers contain discounted prices which are less than zero. For example it will be impossible for the admin to apply a \$10 discount to a \$5 product.
- **Offer application scheme to be used:** select this check box to combine special offers if multiple offers apply to an order. Leave the check box empty to apply only the most favorable special offer.
- **Number of discount coupons to be displayed per page in the admin zone:** enter a number of coupons you want to be displayed on a page, if there are too many coupons to be displayed on one page.
- **Expand the list of orders, associated with discount coupons:** select this check box to display orders, which are associated with discount coupons, on the 'Discount coupons' page.

Click 'Submit' to save the changes.

Creating a special offer

To create a new special offer, in the Administrator Zone select the 'Special Offers' option from the 'Management' menu, and then click on 'Add new special offer'.

Admin menu :: Special offers

Special Offers

▶ Add new special offer

User Name :

Password :

Login

Setting up a new special offer consists of two steps:

Admin menu :: Special offers :: Special offer Type

Special Offer Type

1. Describe condition when this special offer applies:

- Customer buys a certain quantity of a product
- Order total exceeds a certain amount
- Customer buys a specified set of products
- Customer earns a certain number of bonus points
- Every Nth product purchased

2. Specify the type of bonus the customer gets when his order meets the condition:

- Discount on a category and/or products
- Specially-priced/free product
- Free shipping
- Bonus points

Special offer name (shown in the offer list in Admin zone):

[Next](#) ▶

1. Specify the special offer condition (e.g.: minimum order total), the type of a bonus (e.g.: discount) the customer gets when his order meets the condition and the name of this special offer, and click on the 'Next' link as shown in figure above

2. Set up the special offer options peculiar to the condition and bonus type selected, and specify the offer validity period.

Condition types

Promotion Tools module allows you to define the following condition types:

1. **Customer buys a certain quantity of a product.** Offer bonus applies when a customer adds a certain quantity of a specified product or products from a specified category into his cart. The offer can be applied to all products. You can specify the product, quantity and the category in the condition options

Customer buys a certain quantity of a product

All Products:

Product: Canon EOS 6.3MP Digital Rebel Camera with 18-55mm Lens

Category:

Quantity:

2. **Order total exceeds a certain amount.** The shopping cart subtotal is calculated at non-discounted prices and compared to the specified amount. If the subtotal is greater than or equal to the amount declared in the special offer a bonus is granted to the customer. This condition has only one option - minimum order total amount required to meet the condition

Order total exceeds a certain amount

Minimum order total:



Please Note: minimum order total must be greater than zero.

3. **Customer buys a specified set of products.** To qualify for a bonus a customer must place a specified set of items into his shopping cart. If a customer adds more than one set of products to his shopping cart, the bonus still applies only once. To configure this condition, click on the 'Select product...' button, choose a product that should belong to the set, and click on the 'Update' button at the bottom of the options page, then you will be able to add more products to the set or delete products from the set. Every time you modify the set, click on 'Update' to save the changes.

Customer buys a specified set of products

Title	Delete
PalmOne Tungsten T5 Handheld	<input type="checkbox"/>
PalmOne Zire 31 Handheld	<input type="checkbox"/>

Add product:

4. **Customer earns a certain number of bonus points.** Customers can earn bonus points when they purchase products or receive the points some other way. Store admin can view and change customers' bonus points manually by accessing their profiles. Customers can review the number of bonus points they have in their profile ('Modify profile' menu). A customer must earn a certain number of bonus points to become eligible to a bonus. When a customer uses his bonus points to purchase items from the store, the number of points specified in condition options is subtracted from his account.

Customer earns a certain number of bonus points

Number of points granted:

5. **Every Nth product purchased.** The difference with condition 1 here is that this condition can be applied to one order more than once, depending on how many products the customer buys. The only bonus type that can be used with this condition is a 'specially-priced/free product' (see below: bonus type 2).

Every Nth product purchased

Product:
Category:
N:

6. **Customer has a certain membership.** Bonus is only available to customers with a certain membership. In the condition options specify a membership group or a list of membership groups that are eligible for the bonus as shown in figure below:

Customer has a certain membership

Membership:
To (un)select more than one membership, Ctrl-click it

VIP members
First 100 customers

Membership type is defined in Membership section of Admin.

Bonus types

The following bonus types can be used to define a special offer:

1. **Discount on a category and/or products.** With this bonus type once the customer's shopping cart meets the condition, any amount of selected products can be added to the cart at a discounted price. In bonus options enter the discount amount either as a percentage of a regular price (%) or as a fixed value (\$). You can choose to give a discount on all products available at the store, a certain category of products or a number of individual products. To add products click on the 'Select product...' button, choose a product, and click on the 'Update' button at the bottom of the options page, then you will be able to add more products to the list or delete products from the list as shown in figure below. Every time you modify the product list, click on 'Update' to save the changes.

Discount on a category and/or products

Discount amount: % or \$

On all products:

On the following products:

Title	Delete
Kodak Easyshare Z740 5MP Digital Camera	<input type="checkbox"/>

Add product:

On the following category:

2. **Specially-priced/free product.** With this bonus type once the customer's shopping cart meets the condition, the customer becomes eligible to purchase one of the specified items at a special price. More than one product can be specially priced; each product can be assigned its own special price. If you choose a category to be specially priced, the same special price rate will be assigned to all products in the category, but the customer will only get a special price on one product from the category. In bonus options select a product or a category, enter its bonus price either as a percentage of a regular price (%) or as a fixed value (\$), and click on the 'Update' button at the bottom of the options page as shown in figure below. Every time you modify the product/category list click on 'Update' to save the changes.

Specially-priced/free product

Product	Category	Shop price	Bonus price	type	Delete
Paint Shop Photo Album 5 Deluxe		\$ 40.00	<input type="text" value="0.00"/>	\$	<input type="checkbox"/>
Adobe Photoshop CS		\$ 599.90	<input type="text" value="90.00"/>	%	<input type="checkbox"/>
Add Bonus Price:					
<input type="button" value="Select product ..."/>	<input type="text" value="None"/>		<input type="text" value="0"/>	<input type="text" value="\$"/>	

 **Please Note:** you can add multiple products, but only one category.

3. **Free shipping.** This bonus type grants free shipping of all items in the shopping cart if the condition is met. You can specify a list of countries for which free shipping applies; the default is 'all countries'

Free shipping

Free shipping to:

all countries

following countries:

4. **Get bonus points.** When the condition is met, the customer gets the specified number of bonus points. He can then use existing bonus points to pay for his next orders or get a discount for bonus points if corresponding special offers exist. In bonus options enter the number of points to be granted to the customer

Bonus points

Number of points granted:

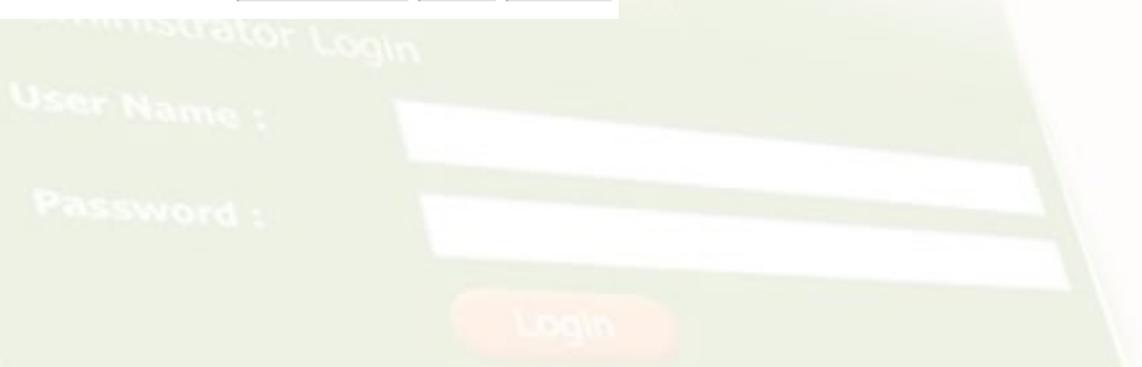
Promotion period

In the special offer options you also specify the '**Promotion period**' during which the offer is valid as shown in figure below. When you finish the offer setup, click on the '**Update**' button at the bottom of the options page to save the changes.

3. Promotion period

Start date of the offer:

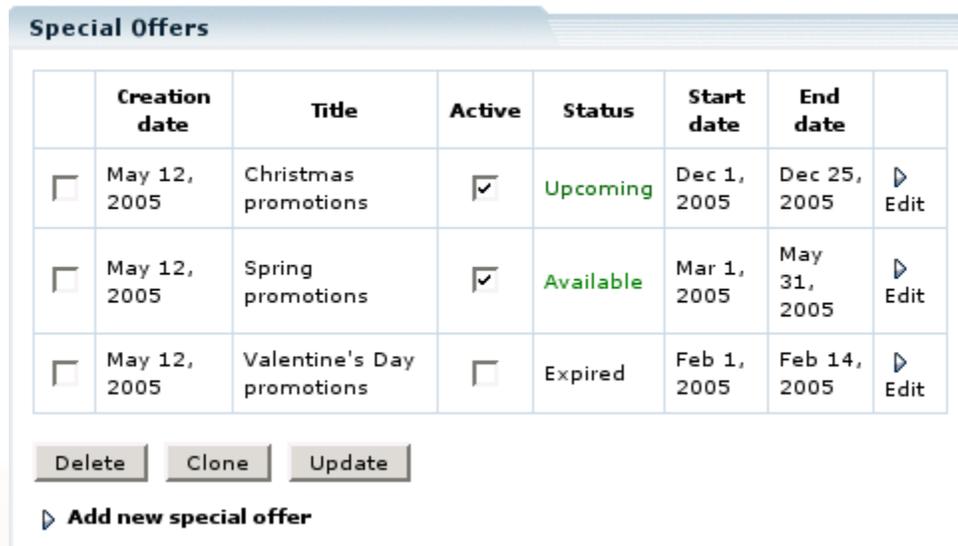
End date of the offer:



Managing special offers

After you have created a special offer, you can edit its options and settings. You can also specify additional offers and delete unnecessary ones as shown in figure below:

Admin menu :: Special offers



The screenshot shows a web interface for managing special offers. It features a table with columns for Creation date, Title, Active, Status, Start date, and End date. Below the table are buttons for Delete, Clone, and Update, and a link to Add new special offer.

	Creation date	Title	Active	Status	Start date	End date	
<input type="checkbox"/>	May 12, 2005	Christmas promotions	<input checked="" type="checkbox"/>	Upcoming	Dec 1, 2005	Dec 25, 2005	▶ Edit
<input type="checkbox"/>	May 12, 2005	Spring promotions	<input checked="" type="checkbox"/>	Available	Mar 1, 2005	May 31, 2005	▶ Edit
<input type="checkbox"/>	May 12, 2005	Valentine's Day promotions	<input type="checkbox"/>	Expired	Feb 1, 2005	Feb 14, 2005	▶ Edit

[▶ Add new special offer](#)

To edit an existing offer, click on the 'Edit' link next to the offer.

To **activate/deactivate** an offer, select or deselect the corresponding check box in the 'Active' column and click on the 'Update' button.

To delete an offer, select the corresponding check box on the left and click on the 'Delete' button.

When creating several special offers, sometimes it is more convenient to make a copy of an existing offer and modify it rather than define the offer from scratch. To do so, select the check box on the left from the offer you want to duplicate and click on the 'Clone' button.

Bonus Points

When the **Promotion Tools module** is installed on your Hosted Ecommerce online store, a new payment method 'Pay by bonus points' appears under 'Payment methods' tab in the 'Settings' section of Administrator zone as shown in figure below. This option allows store customers to use their bonus points to pay in full or in part for orders they place. If you do not want your customers to be able to pay with bonus points un-select the corresponding 'Active' check box and click on the 'Update' button to disable this payment method. You can also type in custom values for 'Method' and 'Special instructions' fields and click on the 'Update' button to save these settings.

Admin menu :: Payment methods

Payment methods

This page is used to define payment methods you'd like to accept for your store.

Optional "special instructions" can be defined for each payment method. They will be shown to the customer during checkout and can be used to pass along important information to the customer. Example: "Make all checks payable to..."

ID	Method	Special instruction	Pos.	Active
credit_card	Credit Card	Visa, Mastercard, American Express	10	<input checked="" type="checkbox"/>
purchase_order	Purchase Order		20	<input type="checkbox"/>
phone_ordering	Phone Ordering	Phone: (555) 555-5555	30	<input checked="" type="checkbox"/>
fax_ordering	Fax Ordering	Fax: (555) 555-5555	40	<input type="checkbox"/>
money_ordering	Money Order	US Banks Only	45	<input type="checkbox"/>
echeck	Check	Check payment	50	<input type="checkbox"/>
cod	COD	Cash On Delivery	60	<input checked="" type="checkbox"/>
bonus_points	Pay by bonus points		70	<input checked="" type="checkbox"/>

User Name :

Password :

Login

Discount Coupons

Issuing discount coupons is a widely accepted marketing tool used to attract new customers. Merchants make discount coupon codes available to potential customers through specialized websites, e-mail subscriptions to promotions and by other means. Customers use the coupons by entering a special discount code in the appropriate box when finalizing an order; the coupon is then applied to the total order cost.

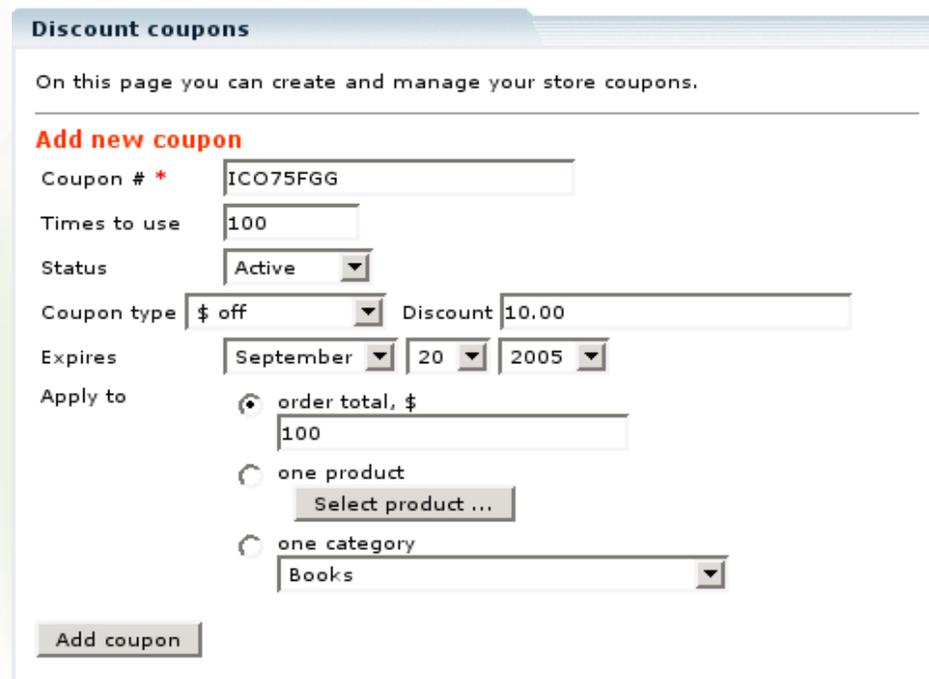
Creating a discount coupon

In order to create a coupon, in the Administrator zone select the 'Discount Coupons' option from the 'Management' menu (Figure 19). A hard-to-guess 'Coupon #' code is being generated automatically, but you can also type in your own code. Coupon settings include the following options:

- **Times to use:** specifies how many times a coupon can be used;
- **Status:** specifies whether the coupon is 'Active' or 'Disabled';
- **Coupon type:** specifies a kind of an offer associated with the coupon;
- **Discount:** if a coupon type is '\$ off' or '% off', enter discount amount in this field;
- **Expires:** limits the period of coupon validity;
- **Apply to:** defines the condition under which the special offer applies, the following conditions can be selected:
 - order total, \$: the coupon applies to orders with subtotal over a specified amount (if amount is set to 0, the discount applies to any order);
 - one product: the coupon offers a discount on an individual product;
 - one category: the coupon offers a discount on a product from a certain category.

When you are done with the settings, click on the 'Add coupon' button to create a coupon.

Admin menu :: Discount coupons



Discount coupons

On this page you can create and manage your store coupons.

Add new coupon

Coupon # *

Times to use

Status

Coupon type Discount

Expires

Apply to

order total, \$

one product

one category

Managing discount coupons

When you have created a coupon, you can review its details under the 'Discount Coupons' section of the 'Management' menu as shown below. Coupon details presented there include:

- status ('Active', 'Disabled', or 'Used');
- the bonus it offers;
- bonus condition;
- number of times the coupon has been used by customers;
- coupon expiration date;
- a list of orders where the coupon has been used.

You can use search filters to display active, used or disabled coupons. Select a status or a combination of statuses and click 'Show'. Only the coupons with relevant statuses will be displayed.

Admin menu :: Discount coupons



Discount coupons

On this page you can create and manage your store coupons.

Search filters

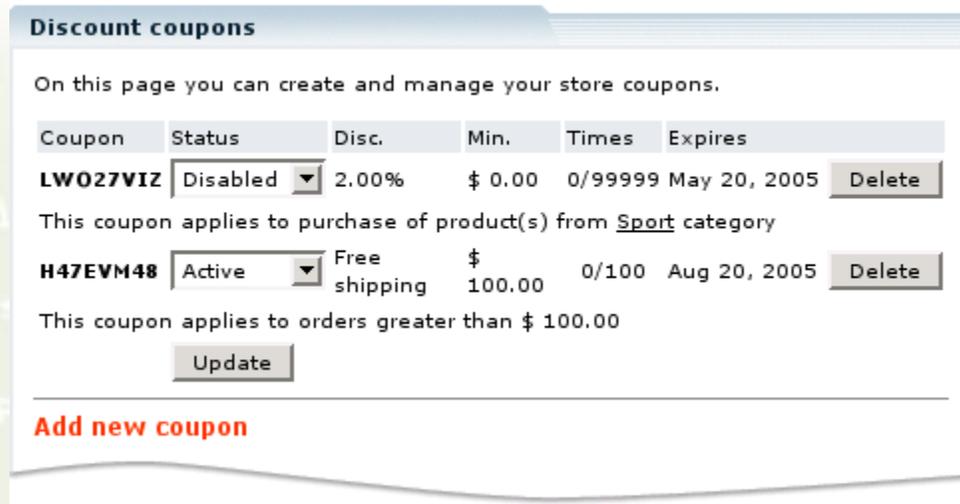
Show coupons with statuses: All Active Disabled Used

The presentation of a coupon depends on its status: 'used' coupons are displayed in red, while 'disabled' and expired coupons are crossed out.

To change the status of a coupon, in the 'Status' column select the new status from the drop-down list and then click on the 'Update' button.

To see the details of an order associated with a coupon, click on the 'details>>' link next to the order information.

Admin menu :: Discount coupons



Discount coupons

On this page you can create and manage your store coupons.

Coupon	Status	Disc.	Min.	Times	Expires	
LW027VIZ	Disabled	2.00%	\$ 0.00	0/99999	May 20, 2005	<input type="button" value="Delete"/>
This coupon applies to purchase of product(s) from <u>Sport</u> category						
H47EVM48	Active	Free shipping	\$ 100.00	0/100	Aug 20, 2005	<input type="button" value="Delete"/>
This coupon applies to orders greater than \$ 100.00						
<input type="button" value="Update"/>						

Add new coupon

To delete a coupon, you must first delete all the orders associated with it and then click on the 'Delete' button next to the coupon details. Coupons, which have orders associated with them, cannot be deleted.



Please Note: If the status of an order is different from 'Completed' and 'Processed', then deleting the order automatically increases by one the amount of times the coupon can be used.

Processing Orders

Special offers in orders

When a customer takes the benefit of some special offer, the offer is reflected in his order details. Click on an arrow icon next to offer name to see full details of the offer. Multiple special offers can be applied to the same order

Admin menu :: Search orders :: Order details

Order # 33

Order id	#33
Order date	May 13, 2005 14:02

Special Offers Applied :

Spring promotions ▾
Conditions: Order total exceeds a certain amount
Total: 50.00
Bonuses: Discount on a category and/or products
Discount on: Books
Discount: 5.00%

May promotions ▾
Conditions: Customer buys a certain quantity of a product
Product: Acer TravelMate 354TE
Amount: 1.00
Bonuses: Specially-priced/free product
Condition 1: Product: All-Clad Stainless 7-Inch Fry Pan

▶ **Print invoice**

Status: ▾

Notes:

Bonus points in orders

If a customer uses bonus points to pay for the order in full, this is reflected in the order details as shown in Figure below:

Admin menu :: Search orders :: Order details

Order # 59

Order id	#59
Order date	Jul 26, 2005 11:28

Payment method	BONUS!
Delivery	International shipping
Subtotal	\$ 659.00
Shipping cost	\$ 0.00
Bonus points discount:	\$ 659.00
Tax	\$ 0.00
Total	\$ 0.00

▶ [Print invoice](#)

Status:

Notes:

If only part of an order is paid using bonus points, the payment method used to pay the remaining amount is considered the primary payment method and bonus points are marked as 'Bonus points discount' as shown in figure below:

Payment method	COD
Delivery	International shipping
Subtotal	\$ 659.00
Shipping cost	\$ 0.00
Bonus points discount:	\$ 200.00
Tax	\$ 0.00
Total	\$ 459.00

Login

 **Please Note:** If bonus points are used to pay for an order, the part of the order, which is paid using bonus points, is subtracted from the order total. If the order is paid in full with bonus points only, order total is displayed as '0.00'.

Discount coupons in orders

When a customer uses a discount coupon, discount amount is reflected in order details under 'Discount coupon' section

Admin menu :: Search orders :: Order details

Order # 70

Order id	#70
Order date	Jul 28, 2005 11:06

Discount Coupon

Coupon:	5S36SCST
Discount:	20.00%

[▶ Print invoice](#)

Status:

Notes:

Calculating Taxes

When a discount applies to the whole order, tax calculation becomes more complex. Different items offered can have different tax rates, and the tax must be calculated on the discounted price of each item. The solution is to proportionally distribute the discount among the items ordered.

Example: if you sell an item A at \$100, and a tax-free item B at \$50 and give a discount of \$15 on the whole order, then it is considered that the first item gets \$10 off, and the second one gets \$5. The total tax on the order would be the same as the tax on the discounted price of item A (which equals to \$90 = \$100 - \$10), since item B is tax-free.

If the option 'Taxes included in product prices:' is enabled in the 'Taxes' section of the Admin menu, and you enter the special price as a fixed value, the discounted price is calculated including tax.

Customer Zone

When a shopping cart of a customer meets the condition of a special offer, he is eligible to add one item into his shopping cart at a bonus price

You qualify for a special offer



Your order has exceeded \$ 150.00 therefore you can purchase the following products at special prices:



Lamp

Features:

- 40W Maximum

See details 

Price: ~~\$ 20.00~~ \$ 0.00

 BUY NOW



Books

Here's for those 4-eyed fools who are too lazy to play football

Special price 90.00 % [Browse category >>](#)

See details 

Continue checkout..

If a customer decides to take advantage of a special offer, a 'Special Offer' icon appears in his shopping cart next to the specially priced product as shown in next image



Please Note: Of all the items eligible for a bonus price, only the last item added to the shopping cart is assigned a bonus price.

Password :

Login

Shopping cart

The items in your shopping cart are listed below. To remove any item click "Delete Item". To place your order, please click "CHECKOUT".



Panasonic TX-28 CK 1F

70 cm , 20 watts , stereo

Price: \$ 599.00 x = \$ 599.00

Delete item



Lamp

Features:

- 40W Maximum

Price: ~~\$ 20.00~~ \$ 0.00 x = \$ 0.00

Delete item



Free

Delivery:

Subtotal: \$ 599.00

Shipping: \$ 0.00

Tax: \$ 0.00

Order total: \$ 599.00

Clear cart

Update

CHECKOUT

Using Bonus Points

Your store customers can earn bonus points by purchasing products at your store. Every time an order is processed, a certain amount of bonus points is added to the customer's account. If the store is configured to accept bonus points as a payment method, a customer is given an option of paying with bonus points at the time of checkout as shown in next figure:

Login

Shopping cart

Qty	SKU	Product	Price	Total
<input type="text" value="1"/>		Panasonic TX-28 CK 1F	\$ 599.00	\$ 599.00

Delivery:

Subtotal: \$ 599.00

Shipping: \$ 0.00

Tax: \$ 0.00

Order total: \$ 599.00

[Update](#)

Payment method

- Credit Card** Visa, Mastercard, American Express
- Phone Ordering** Phone: (555) 555-5555
- COD** Cash On Delivery
- BONUS!** Pay with bonus points

[Continue..](#)

If you choose to use this option and click on the '**Continue...**' button to proceed with the checkout process, you will see the amount of bonus points required to pay the order in full and the amount of bonus points that you have earned (next figure in document). You can choose to use your bonus points to pay for your order in part or in full. Specify the amount of bonus points in the '**Pay by bonus points**' field and click on the '**Submit order**' button. If you do not have enough bonus points to pay for the order in full, or you have decided to pay only for a part of your order using bonus points, you will be redirected to a page where you can specify another payment method to pay the remainder.

Password :

Login

Shopping cart

Qty	SKU	Product	Price	Total
<input type="text" value="1"/>		Panasonic TX-28 CK 1F	\$ 599.00	\$ 599.00

Delivery: International shipping ▾

Subtotal: \$ 599.00

Shipping: \$ 0.00

Tax: \$ 0.00

Order total: \$ 599.00

Please enter the number of bonus points

	Bonus points	Currency	
Order total:	2995	(\$ 599.00)	
Bonus points available:	4195	(\$ 839.00)	
Pay by bonus points: *	<input style="width: 50px;" type="text" value="2995"/>	(\$ 599)	recalculate

Submit order

Using Discount Coupons

If the store is configured to accept discount coupons, a customer can type in a discount coupon code on his shopping cart page and click on the 'Add' button to use the coupon as shown in next figure (the exact location of the discount coupon add box would depend on the design integrated)

Administrator Login

Password :

Login

Shopping cart

The items in your shopping cart are listed below. To remove any item click "Delete Item". To place your order, please click "CHECKOUT".



Panasonic TX-28 CK 1F

70 cm , 20 watts , stereo

Price: \$ 599.00 x = \$ 599.00

[Delete item](#)

Delivery:

Subtotal: \$ 599.00

Shipping: \$ 0.00

Tax: \$ 0.00

Order total: \$ 599.00

[Clear cart](#)

[Update](#)

[CHECKOUT](#)

Discount coupon

Coupon code

[Add](#)

If the coupon condition is met, the coupon will be displayed in the shopping cart page (next figure in this document) and during the checkout process. If you decide not to use the coupon, you can click on the 'Delete' button in the 'Discount coupon' box. Discount coupon used is also reflected in the purchase invoice.

Password :

Login

Shopping cart

The items in your shopping cart are listed below. To remove any item click "Delete Item". To place your order, please click "CHECKOUT".



Panasonic TX-28 CK 1F

70 cm , 20 watts , stereo

Price: \$ 599.00 x = \$ 599.00

[Delete item](#)

Delivery:

Discount coupon



- \$ 5.00
on all orders

[Delete](#)

Subtotal:	\$ 599.00
Discount:	\$ 5.00
Shipping:	\$ 0.00
Tax:	\$ 0.00
Order total:	\$ 594.00

[Clear cart](#)

[Update](#)

[CHECKOUT](#)

Administrator Login

User Name :

Password :

[Login](#)