# *Portal Prodigy*™
# Promotion Codes Features in Detail

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# 1.1 Introduction

This chapter describes how to create promotion codes.  The Promotion Code feature presents a powerful tool for increasing sales, attracting new customers, and generating repeat sales from existing customers.  PORTALPRODIGY's Promotion Code feature greatly simplifies the process of creating and managing promotions for both products and services.  It also makes it easy to target specific categories of customers offering specialized promotions to targeted groups.

The Promotions Code feature is used to create Promotions Codes which are coupons for offering customers discounts, add-ons and free products.  Promotion Codes can be created for Events, Exchanges, Membership Types, and Products.  Promotion codes can be applied to individual item pricing, groups of items and to order totals.

Promotion Codes feature benefits include:

- Automatic management and real time validation of promotion offers at point of sale.

- Seamlessly integrates with the Shopping Cart feature.

- Offer $ Discounts on specific Items, e.g. "Spring Clearance, 40% off selected items".

- Offer $ Discount on entire Order based on qualification rules, e.g. "Purchase $25 or more and get 15% off entire order".

- Offer giveaways predicated on purchase of minimum quantity or dollar amount such as "Buy one get one free" or "Purchase any Desktop Computer and get a free 17" LCD Monitor".

- Automated inclusion of Items based on specified criteria including brand, manufacturer, vendor, product line, categories, etc.

- Automated email broadcasting of promotions to targeted recipients.

- Set minimum purchase dollar amount to qualify for offer.

- Set minimum purchase quantity of item in order to qualify for offer.

- Set maximum dollar discount.

- Ability to limit one offer per order.

- Ability to allow customer to combine offers.

- Easy selection of applicable products.

- Permits product exclusion lists.

- Provides customer with option to view offer and accept or decline.

- Automatic expiration of offers based on specified date range.

- Option to set time of day that the offer begins and ends, thus supporting promotions such as a "12 hour sale" or a "Midnight Madness Sale".

- Create campaigns to manage and track promotions.

Some of the components, fields and settings of the Payments feature, discussed in detail in this chapter, are:

**Search for Promotion Codes:**
Code ID
Code
Feature
Campaign
Date Created range
Date Modified range
Method
Search option
Add New option
Clear criteria option
Print criteria option
Go to Main Menu option

**Found Promotion Codes:**
ID
Code
Applies To
Method
Add New option
Clear criteria option
Print criteria option
Go to Main Menu option

**Promotions Codes Management page:**
Applies To
Code ID
Code
Feature
Campain
Description
Start Date
Start Time
End Date
End Time
May be used with other Promotion Codes?
Minimum Purchase Amount
Minimum Order Quantity
Item Limit
Method:
- % Discount
- $ Discount
- Free /Discounted Items
- Specified Price
% Discount
Maximum $ Discount Allowed
Free & Discounted Items Section:

- ID
- Price
- Specified Price
- Quantity
- Free Shipping option
- Delete option
Applicable Items section
Method:
- Specify Items
- Specify Criteria
- Specify Criteria option
- Exclude Items option
Excluded Items section
- ID
- Description
- Price
- Delete option
Created By User
Created By Date
Modified By User
Modified By Date
Active flag
Chapter ID
Private option

# 1.2 The Visitor Experience

Visitors to the website utilize promotion codes when purchasing products or services. The applicable feature component provides an entry field on the View Cart page or applicable checkout page such as **Promotion Code:** [ ] Apply for the customer to enter their promotion code.

If the customer enters an incorrect promotion code or the code is no longer valid, they will receive a message like the one below:



The customer is presented with the option to cancel their order, modify their order or continue processing their order without the promotion code.

When the customer enters a valid promotion code, the feature will apply the promotion code and adjust the price or present the offer as shown below.



The customer is presented with options to accept or reject the offer. When the promotion code allows the offer to be combined with other offers, it will include the **Promotion Code:** [ ] Apply

option to enter additional promotional codes.  When the promotion code does not allow the offer to be combined with other offers, this option is not displayed.

During the product Shopping Cart Checkout process, the Order Approval page displays for each Item, the promotion code that has been applied.  Each Item's Unit Price is also adjusted to reflect the offer.



## 1.3 Components

The following components are used to create and administer promotion codes.

### 1.3.1    Search for Promotion Codes

Used to search for and retrieve previously created promotion codes.

***Search Criteria section:***



- **Code ID** – search on the PORTALPRODIGY Record ID assigned to a promotion Code.

- **Code** – search for a Promotion Code.

- **Feature** – search for Promotion Codes for a specific Feature Component.

- **Campaign** – search for Promotion Codes for a specific Campaign.

- **Date Created** – search for promotion codes created within the specified date range.

- **Date Modified** – search for promotion codes modified within the specified date range.

- **Method** – search on any one of the following promotion methods:

    - $ Discount

    - % Discount

    - Free / Discounted Items

    - Specified Price

- **Items Per Page** – used to select the maximum number of matches (Promotion Codes) displayed at a time.

- **Search** - used to submit search criteria to PORTALPRODIGY.


***Found Promotion Codes section:***

**Found Promotion Codes**

| Page 1 of 1 | | | Total matches: 5 |
| --- | --- | --- | --- |
| ID | Code | Applies To | Method |
| 1 | C001 | Item | % Discount |
| 2 | C002 | Item | Free / Discounted Items |
| 3 | PC-001 | Order | Free / Discounted Items |
| 4 | PC-002 | Item | % Discount |
| 5 | Event101 | Order | Free / Discounted Items |

- ID – displays the PORTALPRODIGY Record ID assigned to the Promotion Code.

- Code – displays the Promotion Code.

- Applies to – specifies either *Item* or *Order* to describe what the Promotion Code applies to.

- Method – displays the promotion method.

| | |
| --- | --- |
| Add New | Opens the Promotion Codes Management page to create a new Promotion Code. |
| Clear | Clears the search criteria. |
| Print | Prints the website page to the user's local printer. |
| Main Menu | Closes the page and returns to the Site Administration Menu. |

## 1.3.2    Promotion Codes Management

Used to create, edit and delete Promotion Codes.

**Promotion Codes Management**

| Details | |
|---|---|
| Applies To: | Item |

| | |
|---|---|
| CodeID: | 1 |

| | | | |
|---|---|---|---|
| Code: | C001 |
| Feature: | Products | Campaign: | |
| Description: | Spring Special. Save on these wonderful cosmetics. | | |
| Start Date: | 03/01/2004 | Start Time: | 12:01AM |
| End Date: | 03/31/2004 | End Time: | 11:59PM |
| May be used with other promotion codes? | ⦿ Yes ◯ No | Minimum Purchase Amount: | $0.00 |
| Minimum Order Quantity: | 0 | Item Limit: | 0 |
| Method: | ◯ $ Discount  ⦿ % Discount  ◯ Free / Discounted Items  ◯ Specified Price | | |
| % Discount: | 10% | Maximum $ Discount Allowed: | $0.00 |

- **Applies To** – when adding a new promotion code two options are displayed. Once the Promotion Code is saved this setting becomes read only. The two options are:

    o **Order** – select to make the promotion offer apply to the customer's entire order. E.g. "Purchase $25 or more and get 15% off entire order".

    o **Item –** select to make the promotion offer only apply to applicable items. E.g. "Spring Clearance, 40% off selected items".

- **Code ID** – this is the Record ID automatically assigned to the Promotion Code when it is saved for the first time.

- **Code** – used to assign a Promotion Code. The customer is required to provide this code in order to receive the promotion offer.

- **Feature** – used to specify the applicable Feature Component.

- **Campaign** – used to associate the promotion with a specific Campaign. Campaigns are created using the Campaign Management page. Many promotion codes may be associated with a single Campaign.

- **Description** – used to enter a textual description of the promotion.

- **Start Date** – used to enter the starting date of the promotion.

- **Start Time** – used to enter the time of day that the promotion starts. This will default to 12:01 AM which is the beginning of the day.

- **End Date** – used to enter the ending date of the promotion.

- **End Time** – used to enter the time of day that the promotion ends. This will default to 11:59 PM which is the end of the day.

- **May be used with other Promotion Codes** – used to specify whether the promotion may be combined with other promotions. It defaults to *Yes*. Set to *No*, to limit customer to applying only the one promotion to their order.

- **Minimum Purchase Amount** – used to enter a minimum purchase $ amount required before the promotion may be applied to the order such as "Get 10% off on purchases of $25 or more".

- **Minimum Order Quantity** – used to enter a minimum purchase quantity required before the promotion may be applied to the order such as "Buy 2 get 1 free".

- **Item Limit** – used to enter a maximum quantity of an item that may have the promotion applied to it.

- **Method** – used to select a promotion method. The following options are available:

  - $ Discount – used to apply a specified dollar discount to the item or order.

  - % Discount – used to apply a specified percentage discount to the item or order.

  - Free / Discounted Items – used to include free or discounted items on the order.

  - Specified Price – used to specify specific prices for promotion items.

- **% Discount** – used to enter the percentage discount.

- **Maximum $ Discount Allowed** – used to enter a maximum dollar discount that can result from the promotion code.
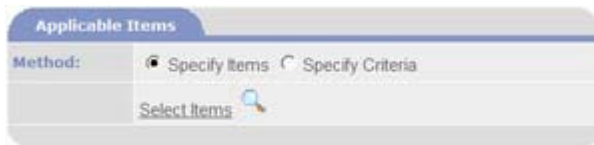
*Free & Discounted Items section:*



| ID | Price | Specified Price | Qty | Free Shipping | Delete |
|----|-------|-----------------|-----|---------------|--------|
| 1 | $15.00 | $0.00 | 1 | ☐ | ⊖ |

- **ID** – displays the Record ID automatically assigned to the free or discounted Item when it is saved for the first time. It is read only.

- **Price** – displays the standard sales price for the Item. It is read only.

- **Specified Price** – used to enter the promotion price for the offered Item. Set to 0 to offer the Item for free.

- **Quantity** – used to specify the quantity that is offered at the specified price or for free.

- **Free Shipping** – used to specify whether the customer is charged for shipping of the free or discounted Item. Defaults to unchecked. When unchecked the customer will be charged for shipping. When checked the customer will not be charged for shipping.

- **Delete** ⊟ - used to remove an Item.

*Applicable/Selected Items section:*



- Method – provides the following options:

    o Specify Items – select to specify specific Items that the promotion offer applies to. PORTALPRODIGY maintains a list of the Item IDs

    o Specify Criteria – select to specify criteria that will dynamically match applicable Items the promotion applies to. E.g. when a brand is specified, all Items of that brand are included in promotion and if you add new Items during the promotion period they will also qualify for the promotion.

*Selected Items section:*



- **ID** – displays the Record ID automatically assigned to selected Item when it is saved for the first time. It is read only.

- **Description** – displays the description for the Item. This is the description entered in Item Management. It is read only..

- **Price** – displays the standard sales price for the Item. It is read only.

- **Delete** ⊟ - used to remove an Item.

*Excluded Items section:*

| Excluded Items | | | |
|---|---|---|---|
| ID | Description | Price | Delete |
| 17 | Lucidity Powder | $35.00 | ⊟ |

- **ID** – displays the Record ID automatically assigned to selected Item when it is saved for the first time.  It is read only.

- **Description** – displays the description for the Item.  This is the description entered in Item Management.  It is read only..

- **Price** – displays the standard sales price for the Item.  It is read only.
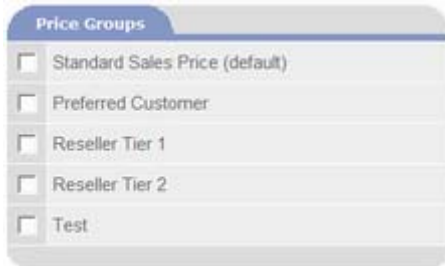
- **Delete** ⊟ **-** used to remove an Item.

*Record section:*

| Record | | |
|---|---|---|
| Created By: | Brock Miller | 03/17/2004 02:13PM |
| Modified By: | Brock Miller | 07/13/2004 06:17PM |
| Active: | Yes ▾ | |
| ChapterID: | 1 | |
| Private: | No ▾ | |

- **Created By -** Indicates who entered the record

- **Modified By -** Indicates who last modified the record.

- **Date Created** – specifies the date and time the Promotion Code record was created.

- **Date Modified** – specifies the date and time the Promotion Code was last modified.

- **Active -** The Active Field can be set to Yes or No. When set to No, the record will no longer be displayed on the visitor (public) portion of the website. It also will be excluded from search results on administrative pages unless the Include deactivated records in search results box is checked.  It does not delete the record but tags the record so it will be filtered from display.

- **Chapter ID** – Indicates the chapter of the user who entered the promotion code record. This field is applicable on multi-chapter versions of PORTALPRODIGY.

- ▪ **Private** – The Private Field can be set to *Yes* or *No.* Selecting *No* indicates that the promotion code record may be used by all visitors. Selecting *YES* indicates that only visitors with appropriate privileges may use the promotion code and causes the Security Groups selection box to be displayed at the bottom of the Promotion Codes Management page. Clicking to check the corresponding check box(es) permits specified group members to use the Promotion Code when placing orders on the website.

*Price Groups section:*

| Price Groups |
| --- |
| ☐ Standard Sales Price (default) |
| ☐ Preferred Customer |
| ☐ Reseller Tier 1 |
| ☐ Reseller Tier 2 |
| ☐ Test |

Used to check each Price Group that the promotion offer applies to.  Using this feature you may limit a promotion to retail customers only, not allowing wholesale customers to use the promotion code.  PORTALPRODIGY automatically validates the promotion code and customer pricing at the time the order is placed and display appropriate prompts.

| | |
| --- | --- |
| Save | Saves the data and continue working on the page. |
| Delete | Deletes the current record.  PORTALPRODIGY will prompt to confirm deletion of the record.  Select OK to confirm the deletion or CANCEL to abort the deletion. |
| Print | Prints the website page to the user's local printer. |
| Cancel | Close the page and discard all entries and edits. |
| Close | Used to close the page.  PORTALPRODIGY will prompt to save changes.  OK response saves changes, closes page, and returns to previous page.  CANCEL response discards all entries and edits (same as Cancel button). |

## 1.3.3    Promotion Code Items to Include - Product Search

Used to locate and retrieve Items to include.

- **Include deactivated records in search results:** when unchecked, only active records are included. Check to include deactivated records.

- **Feature:** this is the PORTALPRODIGY Feature Component that the Item belongs to. The following choices are available in the drop down list box:

  o **All** – this is the default value. It is used to include all Features in search.

  o **Ad –** used to search for Items that are used by CPI Feature Component for advertisement fees. CPI is a special add-on component not available in PORTALPRODIGY.

  o **Event –** used to search for Items that are used by Events Feature Component for event fees.

  o **Exchange –** used to search for Items that are used by Exchanges Feature Component for exchange listing fees.

  o **Membership –** used to search for Items that are used by Membership Feature Component for membership fees.

  o **Press Release –** used to search for Items that are used by Press Release Feature Component for press release broadcasting fees.

  o **Product –** used to search for Items that are used by Shopping Features Component for Products & Services.

- **Classification:** used to search for Items by Classification. Classifications are defined in Features Management.

- **Product ID:** used to search for a specific Item by the Item ID. Note that Product ID and Item ID are the same thing.

- **Gender:** used to search for Items by Gender. Options include:

  o **All** – includes all Items regardless of Gender.

  o **Male Only** – includes only Items with Gender set to *Male*.

- o **Female Only** - includes only Items with Gender set to *Female*.

- o **Universal** - includes only Items with Gender set to *Universal*.

- **Product Name:** used to search for Items by their Product (Item) Name.

- **Accessories:** used to search for Items categorized as Accessories.   Options include:

   - o **Include** - includes Items categorized as Consumables.

   - o **Ignore** – includes all Items regardless of consumables categorization.

   - o **Limit To** – includes only Items categorized as Consumables.

   - o **Exclude** - includes only Items not categorized as Consumables.

- **Product Code:** used to search for Items by product code. Product Code is the part number assigned to an Item.

- **Consumables:** used to search for Items categorized as Consumables.  Options include:

   - o **Include** - includes Items categorized as Consumables.

   - o **Ignore** – includes all Items regardless of consumables categorization.

   - o **Limit To** – includes only Items categorized as Consumables.

   - o **Exclude** - includes only Items not categorized as Consumables.

- **Manufacturer:** used to search for Items by Manufacturer.  Manufacturers are defined in Companies Management as Companies with Company Type set to *Manufacturer*.

- **Vendor:** used to search for Items by Vendor.  Vendors are defined in Companies Management as Companies with Company Type set to *Vendor*.

- **Brand:** used to search for Items by Brand.  Brands are defined in Features Management.

- **Display in Mini Browser:** used to search for Items by Display in Mini Browser setting. Options include:

   - o **All** – used to include all Items regardless of Display in Mini Browser setting.

   - o **Yes** – used to search for Items with Display in Min Browses set to *Yes*.  These are Items that are highlighted by displaying them on the Home page in the Products/Shopping Mini Browser.

   - o **No** – used to search for Items with Display in Min Browses set to *No*.

- **Created Date Range** – when a new Item is created, PORTALPRODIGY stores the date maintained by the PORTALPRODIGY web-server system clock. Entering a date in the first text box only, will retrieve all Items with Created Date greater than or equal to the entered date. Entering a range is inclusive of entered date values.

- **Modified Date Range** – when a new Item is created, PORTALPRODIGY stores the date maintained by the PORTALPRODIGY web-server system clock. Entering a date in the first text box only, will retrieve all Items with Created Date greater than or equal to the entered date. Entering a range is inclusive of entered date values.

- **Product Type** – used to search for Items by Product Type. Product Types are defined in Features Management.

- **Search** - used to submit search criteria to PORTALPRODIGY. If there are matching items they are displayed in the Found Items grid as shown below:

**Found Items**

| Page 1 of 1 | | | Total matches:4 |
|---|---|---|---|
| Select | ID | Product Item | Price |
| ☐ | 16 | Color Intensity Duos | $24.00 |
| ☐ | 14 | Color Intensity Quads | $25.00 |
| ☐ | 17 | Lucidity Powder | $35.00 |
| ☐ | 15 | Oil-Control Loose Powder | $15.98 |

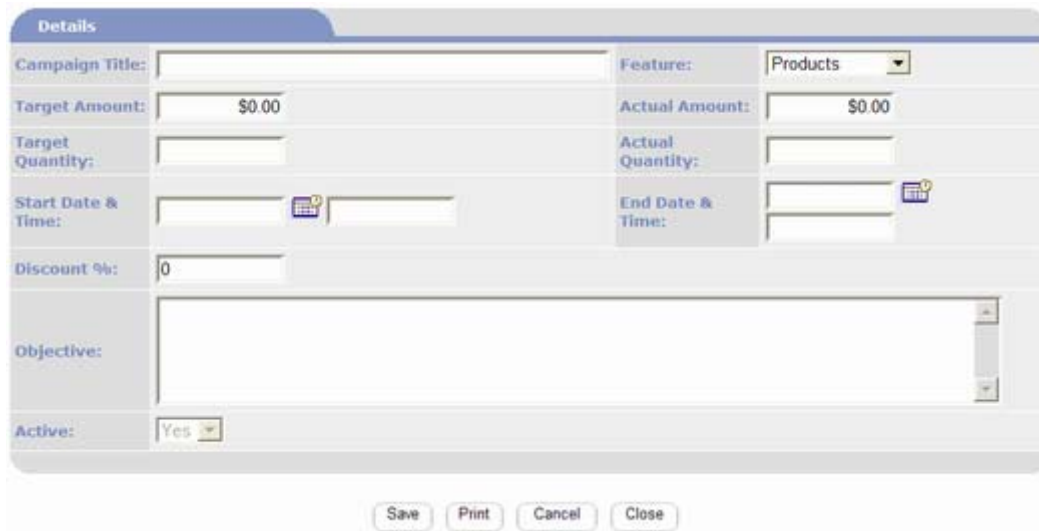Select All   Deselect All   Select   Clear   Print   Close

- **Select -** checkbox used to check each item to be added to the list. When finished with the selections, the **Select** button must be clicked to update the Promotion Code with the selected items.

- **ID** – the Items PORTALPRODIGY Record ID. Read only.

- **Product Item** – the Items description defined in Item Management. Read only.

- **Price** – the Items standard sales price. Read only.

| | |
|---|---|
| Select All | Selects (checks) all Found Items. |
| Deselect All | Deselects (un-checks) all Found Items. |
| Select | Saves selections and returns to the Promotions Management page. |
| Clear | Clears the search criteria. |
| Print | Prints the website page to the user's local printer. |

| | |
|---|---|
| Close | Closes the page and returns to the Site Administration Menu. Note that on this page Close has the same affect as pressing Cancel on other pages. |

## 1.3.4      Campaign Management

Used to create and maintain campaigns. This option is accessed from the Search for Promotion Codes page.



- **Campaign Title** – used to enter a name for the campaign.

- **Feature** – used to select the feature component the campaign applies to.

- **Target Amount** – used to enter a target dollar amount the campaign is intended to produce.

- **Actual Amount** – used to enter the actual dollar amount the campaigned produced.

- **Target Quantity** – used to enter a target quantity the campaign is intended to produce. E.g. for a membership drive this would be the number of new memberships the campaign is targeted to produce.

- **Actual Quantity** – used to enter the actual quantity the campaign produced.

- **Start Date** – used to enter the date the campaign starts.

- **Start Time** – used to enter the time of day the campaign starts.

- **End Date** – used to enter the date the campaign ends.

- **End Time** – used to enter the time of day the campaign ends.

- **Discount %** - used to enter the default percentage discount that will be offered for product promotions.

- **Objective** – used to enter a narrative description of the campaign.

- **Active** – The Active Field can be set to Yes or No. When set to No, the record will no longer be displayed on the visitor (public) portion of the website. It also will be excluded from search results on administrative pages unless the Include deactivated records in search results box is checked. It does not delete the record but tags the record so it will be filtered from display.

| | |
|---|---|
| Save | Saves the data and continue working on the page. |
| Delete | Deletes the current record. PORTALPRODIGY will prompt to confirm deletion of the record. Select OK to confirm the deletion or CANCEL to abort the deletion. |
| Print | Prints the website page to the user's local printer. |
| Cancel | Close the page and discard all entries and edits. |
| Close | Used to close the page. PORTALPRODIGY will prompt to save changes. OK response saves changes, closes page, and returns to previous page. CANCEL response discards all entries and edits (same as Cancel button). |

# 1.4 Feature Administration

The only pre-requisite is that the product or service you want to promote must be configured prior to creating Promotion Codes. If you want to associate the promotion code with a campaign, then you must create a campaign first. This is done using Campaign Management. Campaign Management is accessed from the Search for Promotion Codes page.

To create a new promotion code select **Promotion Codes** + add option from the Site Administration Main menu.

# 1.5 Tutorials

## 1.5.1 Create Product Promotion Codes That Apply to the Customer's Entire Order

1. Read chapter of Administrator Manual titled "Promotion Code Features in Detail".

2. Go to Site Administration Menu.

3. Click on the Promotion Codes add button located in the Transaction Mgmt. section to display the Promotion Codes Management page.

4. Set 'Applies To:' to "Order". E.g. this is used when the Promotion Code will grant the customer 10% off their entire order as opposed to 10% off a specific product Item. To apply to specific products see the tutorial titled "Create Product Promotion Codes That Apply to Specific Products"

5. Enter a unique value for the Code.

6. Select Products as the Feature the Promotion Code applies to.

7. If applicable, select a Campaign. Campaigns are used to track a group of Promotion Codes.

8. Enter a description for the Promotion Code. This can be used to provide the customer with a description of what the Promotion Code offers, any rules that may apply, and other instructions.

9. Enter Start Date and Time. The Promotion Code cannot be used prior to this date and time.

10. Enter End Date and Time. The Promotion Code cannot be used after this date and time.

11. If the customer is allowed to combine this with other Promotion Codes for the same order, set 'May be used with other promotion codes?' to "Yes"; otherwise set to "No".

12. If applicable, enter a Minimum Purchase Amount that is required before Promotion Code can be applied to the Order.

13. Select a Method:

    a. When $ Discount is selected enter the specific dollar discount.

    b. When % Discount is selected, enter the percentage discount; if applicable, also enter a maximum discount dollar amount that is to be allowed.

c. When Free/Discounted Items is selected, add Items using Select Items; and indicate whether Promotion Code is limited to quantity on hand (in stock). Perform the following to add Items.

- Click Select Items to display the Promotion Code Discount Items Product Search. See the tutorial titled "Search for Products and Items".

- Enter search criteria and click the Search button.

- Select Items in the Found Items list.

- Click Select button to add the Items and return to the Promotion Codes Management page.

- To add more Items repeat the last four steps.

- For each Item that is free leave the specified price set to zero, set the quantity to be offered, and indicate if shipping of the item is offered for free.

- For each Item that is to be offered at a discounted price set the Items price. Set the quantity to be offered at the discounted price, and indicate if shipping of the item is offered for free.

- To remove an individual Item, click the Item's Delete button.

14. Indicate which Price Groups the Promotion Code applies to. Note that by default new customers are assigned to the "Standard Sales Price" group.

15. Click the Close button and confirm to save.


## 1.5.2 Create Product Promotion Codes That Apply to Specific Products

1. Read chapter of Administrator Manual titled "Promotion Code Features in Detail".

2. Go to Site Administration Menu.

3. Click on the Promotion Codes add button located in the Transaction Mgmt. section to display the Promotion Codes Management page.

4. Set 'Applies To:' to "Item". E.g. this is used when the Promotion Code will grant the customer 10% off a specific product Item as opposed to 10% off their entire order. To apply to entire order see the tutorial titled "Create Product Promotion Codes That Apply to Customer's Entire Order"

5.  Enter a unique value for the Code.

6.  Select "Products" as the Feature the Promotion Codes applies to.

7.  If applicable, select a Campaign.  Campaigns are used to track a group of Promotion Codes.

8.  Enter a description for the Promotion Codes.  This can be used to provide the customer with a description of what the Promotion Codes offers, any rules that may apply, and other instructions.

9.  Enter Start Date and Time.  The Promotion Codes cannot be used prior to this date and time.

10. Enter End Date and Time.  The Promotion Codes cannot be used after this date and time.

11. If the customer is allowed to combine this with other Promotion Codes for the same order, set 'May be used with other promotion codes?' to "Yes"; otherwise set to "No".

12. If applicable, enter a Minimum Purchase Amount that is required before Promotion Codes can be applied.

13. Select a Method:

    a.  When $ Discount is selected enter the specific dollar discount.

    b.  When % Discount is selected, enter the percentage discount; if applicable, also enter a maximum discount dollar amount that is to be allowed.

    c.  When Free/Discounted Items is selected, add Items using Select Items; and indicate whether Promotion Codes is limited to quantity on hand (in stock).  Perform the following to add Items.

        •   Click Select Items to display the Promotion Codes Discount Items Product Search.  See the tutorial titled "Search for Products and Items".

        •   Enter search criteria and click the Search button.

        •   Select Items in the Found Items list.

        •   Click Select button to add the Items and return to the Promotion Codes Management page.

        •   To add more Items repeat the last four steps.

        •   For each Item that is free leave the specified price set to zero, set the quantity to be offered, and indicate if shipping of the item is offered for free.

- For each Item that is to be offered at a discounted price set the Items price. Set the quantity to be offered at the discounted price, and indicate if shipping of the item is offered for free.

- To remove an individual Item, click the Item's Delete button.

d. When Specified Price is selected, enter the specified price. This is a fixed price charged for all applicable items.

14. Choose a Method for Applicable Items:

a. When Specify Items is selected:

- Click Select Items to display the Promotion Codes Items to Include Product Search. See the tutorial titled "Search for Products and Items".

- Enter search criteria and click the Search button.

- Select Items in the Found Items list.

- Click Select button to add the Items and return to the Promotion Codes Management page.

- To add more Items repeat the last four steps.

b. When Specify Criteria is selected:

- Click Specify Criteria to display the Promotion Codes Items to Include Product Search. See the tutorial titled "Search for Products and Items".

- Enter search criteria and click the Search button.

- Verify that the found items are correct.

- Click Close button to save the criteria and return to the Promotion Codes Management page.

- Click Exclude Items to display the Promotion Codes Items to Exclude Product Search. See the tutorial titled "Search for Products and Items".

- Enter search criteria and click the Search button.

- Select Items in the Found Items list to exclude.

- Click Exclude button to add the Items to the Excluded Items and return to the Promotion Codes Management page.

- To add more Items to the Excluded Items repeat the last four steps.

- To remove an individual Item for Excluded Items, click the Item's Delete button.

15. Indicate which Price Groups the Promotion Codes applies to. Note that by default new customers are assigned to the "Standard Sales Price" group.

16. Click the Close button and confirm to save.

# 1.5.3    How to Create a New Campaign
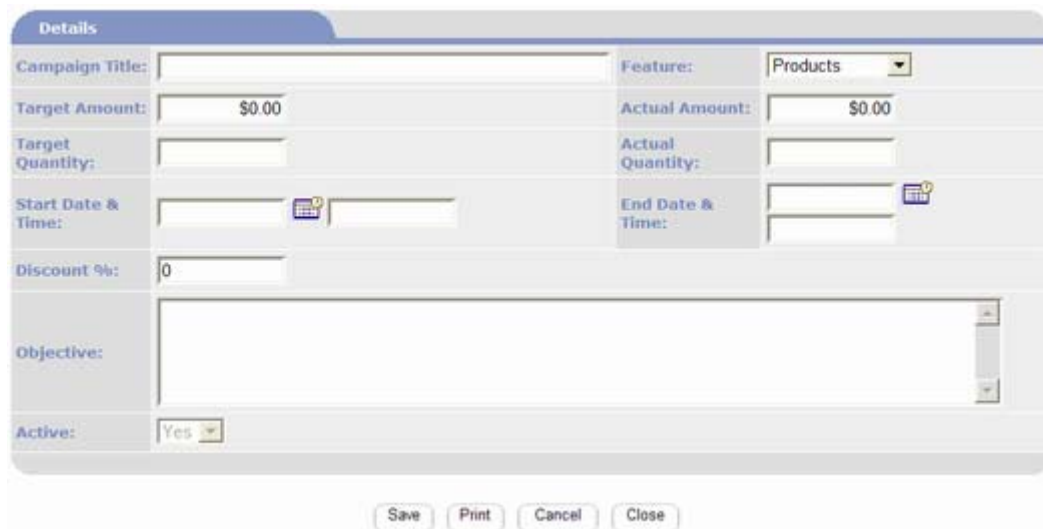
From the Site Administration Main Menu select the **Promotion Codes** [+] [Q] browse option to display the Promotion Codes Browse page.

Click on the **Campaigns** link to display the Campaigns Management page show below.



Click on **Add New Campaign** link to create a new Campaign.



Complete the Details section and click the **Save** button.