Promotion Rule Index

Rule Name	Description	Rule Header Fields to be Updated
IncludesCustomer	Used to offer an online promotion to a specific Customer	Search/Lookup of Customer names
ExcludesCustomer	Used to exclude a specific Customer from an otherwise generally available promotion	Search/Lookup of Customer names
IncludesUserRole†	Used to offer an online promotion to Customers with a specific assigned UserRole. E.G.: Allowing Sales Rep Managers only to enter a special, negotiated discount	Text field to enter UserRole
ExcludesUserRole†	Used to exclude a specific UserRole from an otherwise generally available promotion	Text field to enter UserRole
OrderShippingToCountry	Used to limit a promotion to specific Countries. Often used on Freight/Shipping offers	Dropdown of Country names
OrderNotShippingToCountry	Used to exclude a promotion from specific Countries. Often used on Freight/Shipping offers	Dropdown of Country names
OrderShippingToState	Used to limit a promotion to specific States. Often used on Freight/Shipping offers	Dropdown of State names
OrderNotShippingToState	Used to exclude a promotion from specific States. Often used on Freight/Shipping offers	Dropdown of State names
OrderContainsOrderedProduct	Often used for BOGOs or similar GWP type promotions	Search/Lookup of Product names and text field to enter the quantity of said Product that must be included in order to qualify
OrderContainsOrderedProductInCategory	Often used for BOGOs or similar GWP type promotions	Dropdown of Category names and text fields to enter the dollar value or quantity/item count of Products in said Category that must be included in order to qualify
OrderContainsOrderedProductOfVendor†	Generally paired with DiscountProductsOfVendor Result. Used for Vendor specific special offers	Dropdown of Vendor names and text fields to enter the dollar value or quantity/item count of Products from said Vendor that must be included in order to qualify
OrderContainsPromotion	Used to piggy-back one promotion on another	Dropdown of Promotion names
OrderDoesNotContainPromotion	If multiple promotions are active at the same time, used to ensure incompatible ones are not piggy-backed	Dropdown of Promotion names
OrderProductTotalGreaterThan	Used for: Orders over $xxx will receive…type promotions	Text field to enter dollar amount of Product total required to qualify
OrderProductTotalIsInRange	Used for: $50 - $75 will receive…type promotions. Often run at the same time as another promotion based on OrderProductTotalGreaterThan rule, in order to offer results staggered throughout different order totals	Text fields to enter lower and upper range of dollar amount of Product total required to qualify
OrderShipViaMatches	Usually paired with DollarOffShipping or PercentOffShipping results, in order to offer freight/shipping specials	Dropdown of ShipVias/Carrier Services
ValidPromotionCode	Unique code to be manually entered during checkout in order to qualify for a promotion. Often paired with additional Rules	Text field to enter Promotion/Coupon code
CustomerMaximumTimesPromotionAllowed	Used to limit the number of times each Customer may take advantage of the promotion. E.G.: One Freebie Per Customer	Text field to enter the maximum number of times a single Customer may receive the promotion
MaximumPromotionUsedQuantity	Used for limited availability promotions, such as: The First 100 Customers Will Receive…	Text field to enter the maximum number of times the promotion may be used across the board

Note: †May require implementation of additional Advanced module

Promotion Result Index

Result Name	Description	Result Header Fields to be Updated
AddFreeProduct	Often used for BOGOs or similar GWP type promotions, sampling campaigns and suchlike	Search/Lookup of Product names and a text field to enter the quantity of said Product
AddFreeProductFromCategory	Often used for BOGOs or similar GWP type promotions, sampling campaigns and suchlike	Search/Lookup of Category names and text fields for minimum and maximum value of the free products to be added
DiscountProductsinCategory†	Used to offer Category-wide discounts. E.G.: 20% off all Children's Books	Search/Lookup of Category names, text field to enter the discount, and checkbox to indicate if that discount is a percentage instead of a dollar amount
DiscountProductsOfVendor†	Generally paired with OrderContainsOrderedProductOfVendor Rule. Used for Vendor specific special offers	Dropdown of Vendor names, text field to enter the discount, and checkbox to indicate if that discount is a percentage instead of a dollar amount
DollarOffOrder	Flat dollar amount discount. Often paired with: OrderProductTotalGreaterThan rule	Text field to enter flat dollar amount to be discounted
DollarOffProduct	Usually paired with OrderContainsOrderedProduct rule, to offer Product specific promotions	Text field to enter flat dollar amount and dropdown to select specific Product to be discounted
DollarOffShipping	Usually paired with OrderShipViaMatches rule, in order to offer freight/shipping specials	Text field to enter flat dollar amount and dropdown to select specific Ship Via/Service to be discounted
PercentOffOrder	Percent amount discount. Often paired with: OrderProductTotalGreaterThan rule	Text field to enter percentage to be discounted
PercentOffProduct	Usually paired with OrderContainsOrderedProduct rule, to offer Product specific promotions	Text field to enter percentage and dropdown to select specific Product to be discounted
PercentOffShipping	Usually paired with OrderShipViaMatches rule, in order to offer freight/shipping specials	Text field to enter percentage and dropdown to select specific Ship Via/Service to be discounted
SetOrderedProductToAmount	Optional method of over-ride pricing in a promotional context	Text field to over-ride price and search/lookup to select specific Product to be discounted
SetOrderedProductToFree	Alternative method of offering free products. Customers must add it to their cart, rather than having a free item automatically added. Often used to promote Customer engagement	Search/Lookup of Product names

Note: †May require implementation of additional Advanced module