Promo Codes and Other Discount Criteria

In most cases, you want to set up a set of conditions a customer or an order must meet to qualify for a discount, trial, upsell, or pay plan. The criteria options are the same for each type of promotion and can be used in combination with one another. When you set up more than one criteria, they **all** must be met for the customer to be eligible for the promotion.

First, you will define a set of criteria for each promotion and define how they work together to apply the discount, trial, upsell, or pay plan.

Example:
Goal: Get customers to spend at least $90 net on each purchase during the month of June. Make the offer feel exclusive for the people on my newsletter list by offering a promo code.
Promotion: Order Total Discount - receive 10% off of the total purchase after other discounts have been applied (Net.)
Criteria: (all must be true)

- Purchase between June 1, 2011 and July 1, 2011 (Date Range)
  AND
- Order Total is greater than $100
  AND
- The promo code "NLCUST" is entered during checkout

Date Range

This criteria sets a fixed date range during which the customer must purchase in order to qualify for a promotion or pay plan. You set up a start date and end date. The promotion automatically expires after the end date passes. Date range criteria help you increase urgency, which can often lead to faster purchase. This option does not set up a rolling date range (e.g., within the next 30 days.)

NOTE: Date Range is Eastern Standard Time (EST) Not user/app or contact time zone

Promo Code

This criteria requires a customer enter a specific promo code while checking out through your shopping cart or order form. Promo codes can be a great way of tracking where the purchase originated (i.e. email offer, print ad, mailer, etc.) and foster a sense of

exclusivity.

You can manage existing promo codes by clicking the **Manage Promo Codes** link found on the **Promotions** tab below the **Add New** drop-down box.

> **Important Note!** Promo Codes are text-case sensitive and will **not** operate on legacy order forms or legacy shopping cart.

Product / Qty

This criteria requires a customer purchase a certain number of a specific product. You can use this option to set up volume pricing discounts and / or to run a special on overstocked or discontinued products.

Subscription Program

This criteria requires a customer sign up for a specific subscription program. This can increase interest in a subscription program, and /or encourage the customer to purchase a recommended product/subscription program combination.

Order Total

This criteria requires a customer to spend a minimum amount of money on products (not including taxes, shipping, or subscription programs). It can be used to increase the dollar value of each purchase by encouraging customers to purchase products with a larger profit margin.