

Last updated 19 June 2017

By Erin Lewis

Product: Enterprise Live

Software version no: 8.0.20.1

Document version no: 1.0

Country: Australia

CONTENTS

PROMOTIONS	4	
CREATING A NEW PROMOTION	4	
EDITING AND DEACTIVATING PROMOTIONS	14	
REVERTING PROMOTION DETAILS TO PARENT REGION	16	

ABOUT THIS DOCUMENT

The promotions feature gives you the freedom to set up your own specials and other client benefits. You can create anything from a 'buy 1 get 1 free' promotion, to even the most detailed and complex promotions.

The promotions feature allows you to determine what makes a client eligible for a promotion, based on which items they purchase or how much they spend. You can also choose to apply the promotion to the entire sale or to specific products/services.

There are 3 main steps in the promotion setup process:

- **1. Specify general promotion details:** What is the promotion? When is it available? Who is it available to? How many times can the promotion be used?
- **2. Specify eligibility criteria:** What does the client need to buy (or how much do they need to spend) to become eligible for the promotion?
- **3. Specify promotion benefits:** What benefits will the client receive when they participate in the promotion?

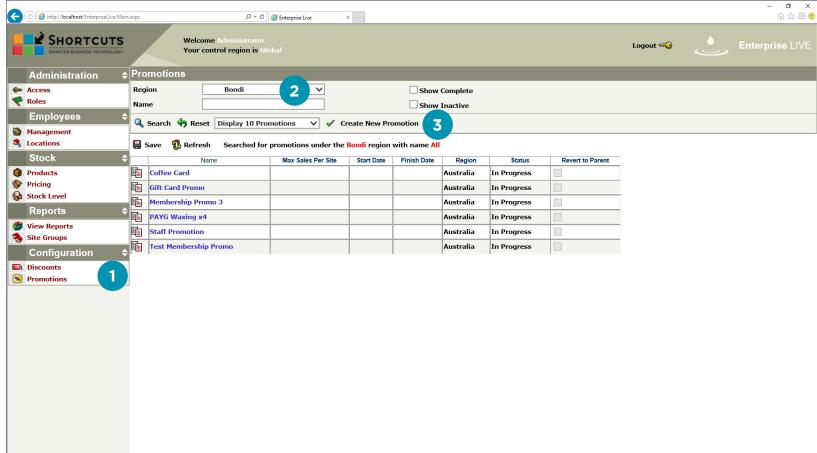
Promotions are created via a 'promotions wizard' which will guide you step by step through the process of setting up a promotion.

PROMOTIONS

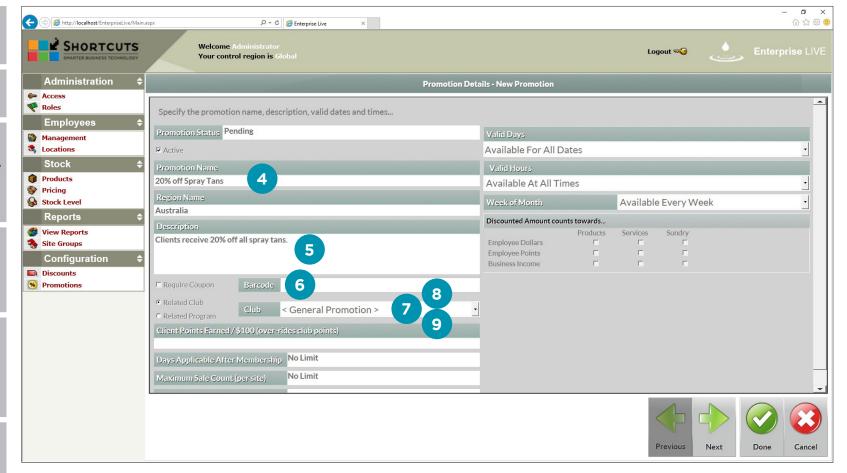
CREATING A NEW PROMOTION

ADDING GENERAL PROGRAM DETAILS

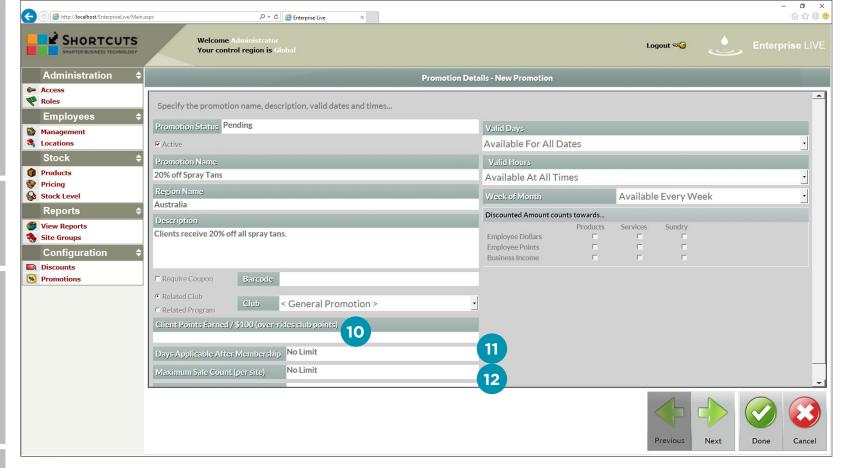




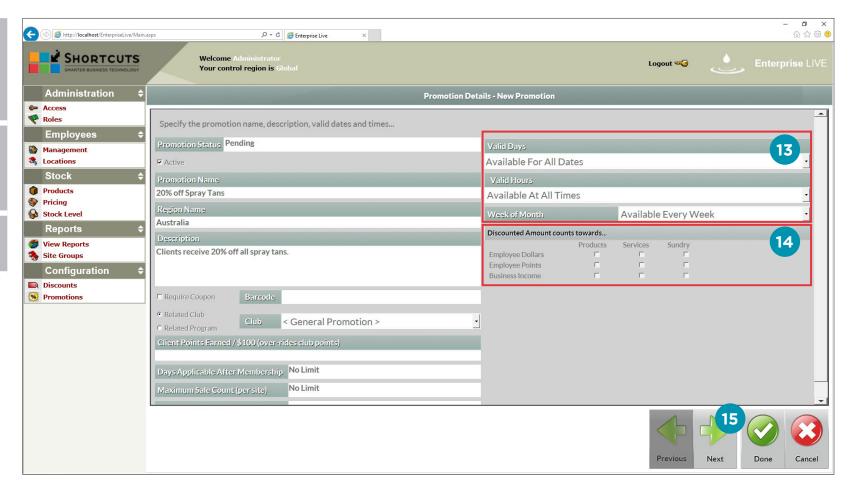
- Enter the name of the promotion into the **promotion name** field.
- **Optional:** Enter a description.
- If your clients will need to present a coupon for this promotion, tick the **require coupon** box and enter the coupon barcode into the **barcode** field.
- If you want this promotion to be available to all your clients, select <general promotion> from the drop-down menu.
- If you want this promotion to be exclusive to members of a club, choose related club, then select the relevant club from the drop-down menu.
- If you want this promotion to be exclusive to members of a membership or loyalty program, choose **related program**, then select the relevant program from the dropdown menu.



- If the promotion is clubspecific, you can change
 the number of client
 points a client will earn for
 every \$100 they spend.
 If you wish to change it,
 enter the number of points
 clients will earn per \$100
 spent. This will override
 the points value specified
 in the club setup screen.
- If your promotion is linked to a club, clients will still receive their normal club discounts on top of the promotion.
- If you want to make the promotion exclusive to new members of the club (i.e. a "welcome" promotion), enter the number of days after signing up that a new member will be eligible for the promotion. Skip this step if the promotion is not club-specific.
- If you only want this promotion to be applied to a limited number of sales per site, enter the number into the **maximum** sale count field.



- Select the valid dates and times from the drop-down menus. If you want the promotion to be available at all times, simply leave this section as is.
- Tick the boxes in areas where you want employees to receive credit prior to the promotional discount.
- Click **next**. The promotion eligibility screen will appear.



SPECIFYING ELIGIBILITY CRITERIA

Select the type of eligibility this promotion is based on. This is the condition the client must meet in order to receive the promotion.

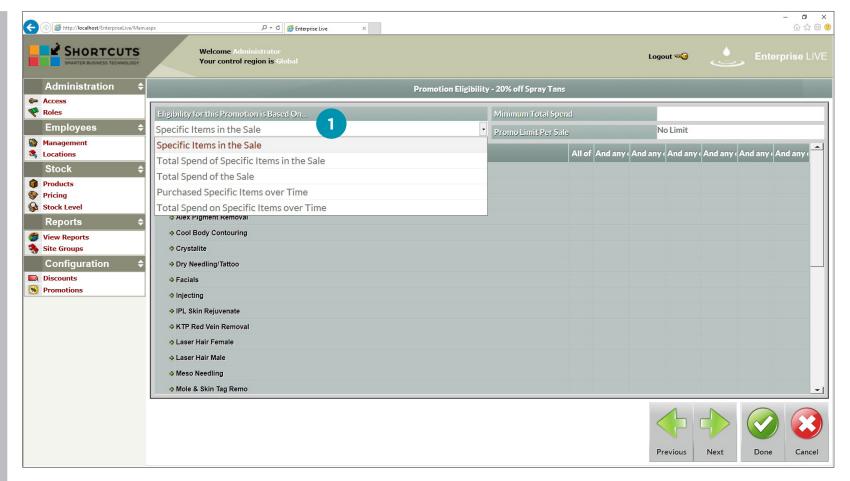
Specific items in the sale: The client will be eligible if they buy a specific number of certain items.

Total spend of specific items in the sale: The client will be eligible if they spend a certain amount on specific items.

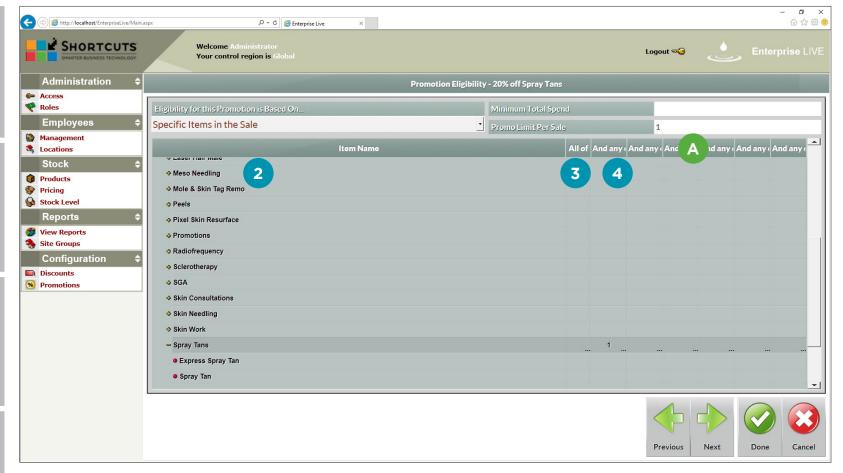
Total spend of the sale: The client will be eligible if they spend a certain total amount.

Purchased specific items over time: The client will be eligible if they buy a specific number of certain items. These purchases need not be made at once, and can accumulate over time.

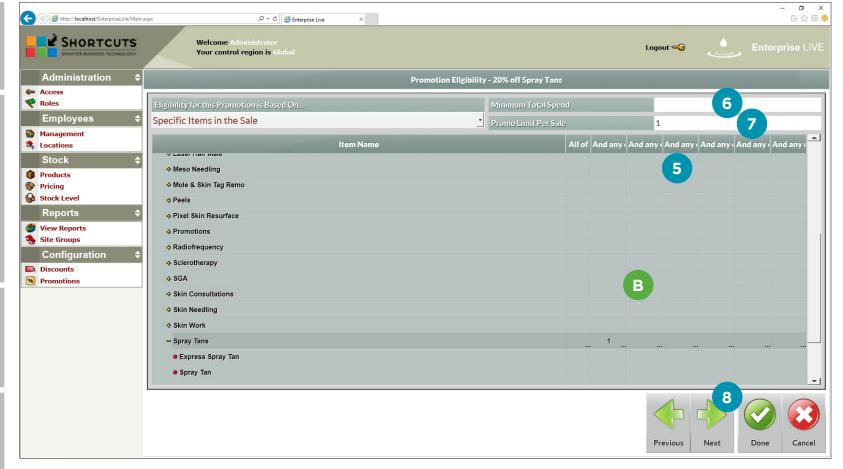
Total spend on specific items over time: The client will be eligible if they spend a certain amount on specific items. These purchases need not be made at once, and can accumulate over time.



- You now need to select the products/services/ sundry items that the client must purchase in order to be eligible for the promotion (if applicable). Double click on categories to view/hide the contents.
- The numbers you enter in the **all** and **any** columns define how many of each item the client must purchase. You can use combinations of the **any** and **all** columns to create complex promotions.
- If the client must purchase a specific combination of items (e.g. the client must purchase both a spray tan and a leg wax), enter the number of each item the client must purchase in the all column.
- If the client must buy specific items, but they will be eligible as long as they buy any of these items (e.g. the client must purchase a spray tan, massage, or a leg wax), click inside the first any column next to each item and enter the amount the client must purchase.



- You can apply the promotion to all/any items within a category by entering a value in the category row.
- If you enter numbers into different **any** columns, then the client must purchase an item (or the specified number of items) from each column. This method can be useful for setting up a promotion where the client must purchase a number of items from various categories.
- If your promotion is based on one of the 'total spend' options, enter the minimum amount the client must spend to be eligible for the promotion.
- If you wish to restrict the number of times the promotion can be applied to a particular transaction, enter the limit in the **promo limit per sale** field. Promotions based on 'total spend' can only be applied once per transaction.
- 8 Click **next**. The promotion benefit screen will appear.



SPECIFYING PROMOTION BENEFITS

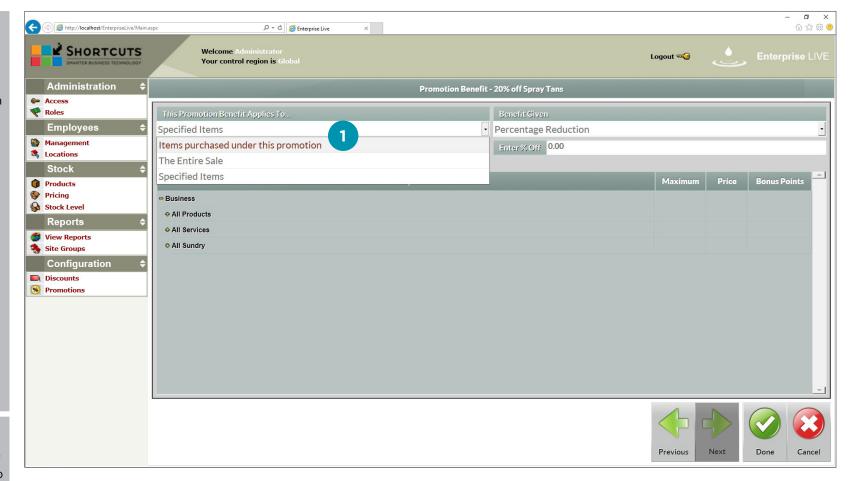
You now need to specify the benefits that are applied to a client's transaction when they are eligible for the promotion. Select what the promotion benefit will be applied to from the drop-down list:

Items purchased under this promotion: The promotion's benefit will apply to the same items purchased by the client that made them eligible for this promotion.

The entire sale: The promotion's benefit will apply to the client's entire transaction (total price).

Specified items: The promotion's benefit will apply to certain items that you will specify on this screen.

If you chose the **specified items** option, continue to
step 3. If you chose one of
the other two options, skip
to step 5.



- If you only want clients to be able to receive an item of equal or lesser value than their original purchase, tick the limit to equal or lesser value than eligibility box.
- If you want Shortcuts to notify you when a client is eligible for a promotion, tick alert when benefit is available.
- Select the benefit that will be applied to the items from the **benefit given** drop-down list:

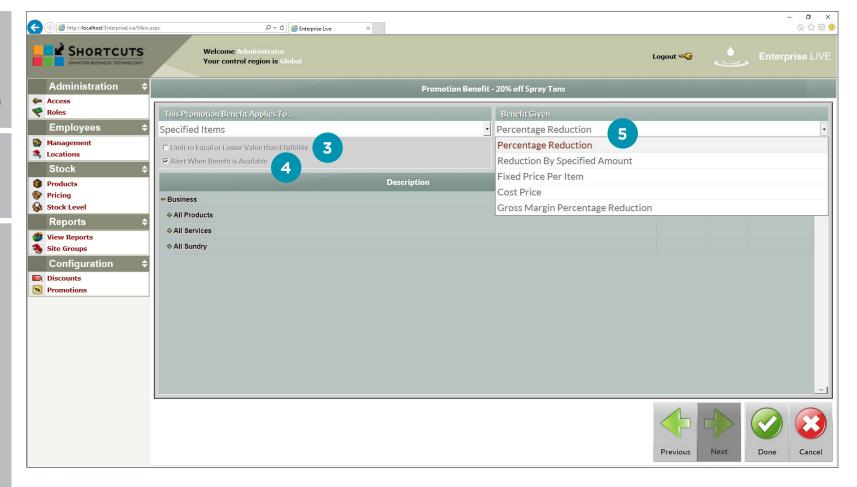
Percentage reduction: Apply a discount percentage.

Reduction by specified amount: Apply a fixed amount discount.

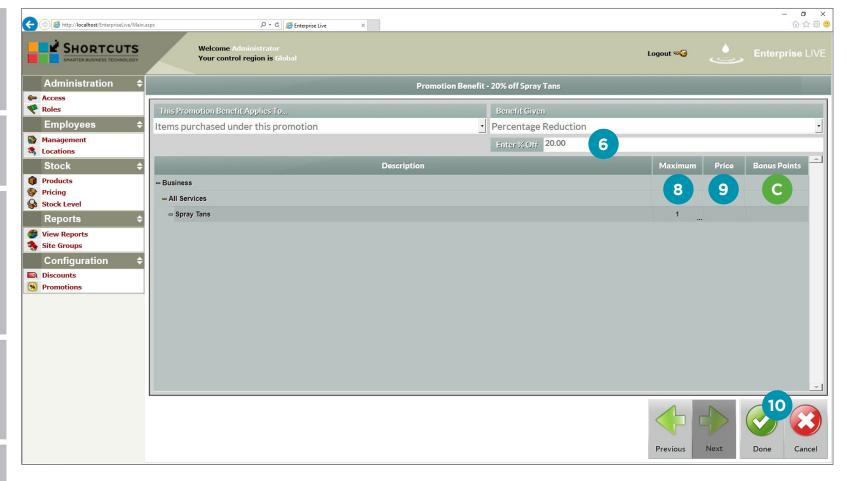
Fixed price per item: Specify a fixed price for the discounted item(s).

Cost price: Sell the discounted item(s) to the client at cost price.

Gross margin % reduction: Apply a discount by a percentage of the gross profit margin. This option only applies to products.



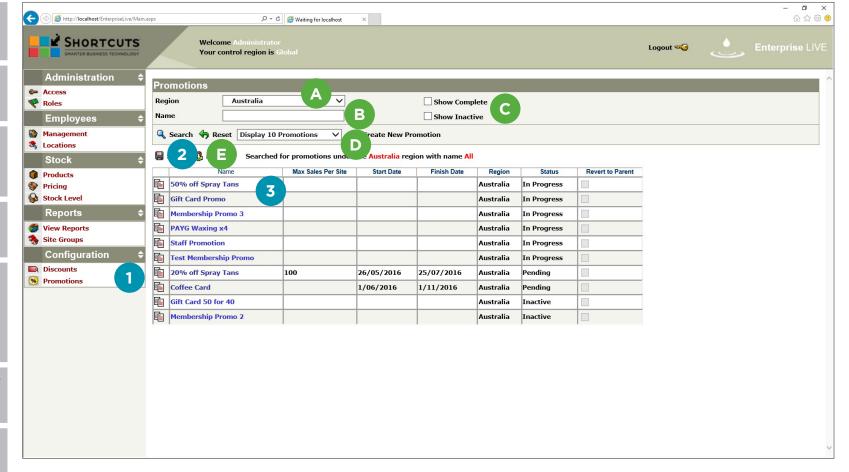
- If you chose percentage reduction, reduction by specified amount, or gross margin % reduction in step 5, enter the desired discount into this field.
- 7 If you chose **the entire** sale in step 1, skip to step 10. Otherwise, continue to step 8.
- Enter a value of 1 or more in the **maximum** column for each item you want to include as a promotional benefit. This is the maximum quantity a client can purchase at the promotional price in one transaction.
- If you selected **fixed price per item** in step 5, click
 to select the **price** field
 beside the relevant item(s)
 and enter the desired
 price.
- If this promotion is linked to a club, you can award clients extra points for an item by entering a value in the **bonus points** field.
- Click **done** to finish creating your promotion.



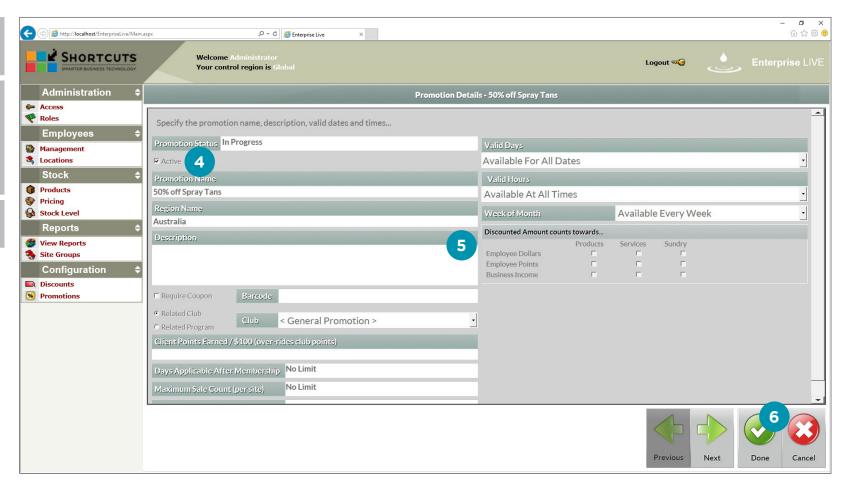
EDITING AND DEACTIVATING PROMOTIONS



- To search for a promotion, enter your desired search criteria, then click **search**.
- A You can search via region by select the relevant region from the dropdown menu.
- B You can search by entering the promotion name into the **name** field.
- You can tick the **show**inactive and **show**complete boxes to include
 inactive and complete
 (past) promotions in the
 search.
- You can select the number of promotions you want to display.
- You can click on the reset button to clear the selected criteria.
- Once you have found the relevant promotion, click on the name.



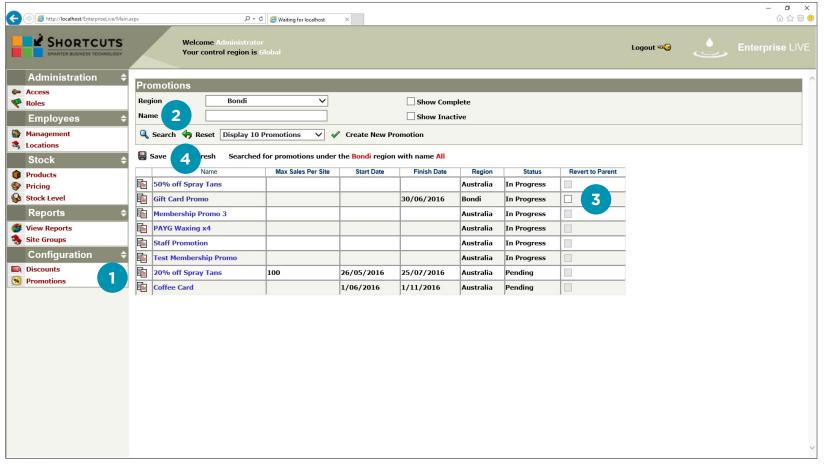
- If you wish to deactivate the promotion, untick the active box.
- To edit the promotion, make your desired changes in the relevant areas. Use the next/previous buttons to navigate between different promotion screens.
- 6 Click **done** when you are finished making changes.



REVERTING PROMOTION DETAILS TO PARENT REGION

If a promotion currently overrides the parent region's promotion and you no longer want it to differ, you can change the promotion back so that it matches the parent region.







it suits you

AUSTRALIA AND ASIA

166 Knapp Street Fortitude Valley QLD 4006 Tel: +61 7 3834 3232

www.shortcuts.com.au

UK AND EUROPE

Dalton House Dane Road, Sale Cheshire M33 7AR Tel: +44 161 972 4900

www.shortcuts.co.uk

NORTH AMERICA

7711 Center Avenue Suite 650 Huntington Beach CA 92647 Tel: +1 714 622 6682

www.shortcuts.net