

Coupon, Promo, Voucher, Gift Certificate and Gift Card Setup – Online Redemption and Checkout

Setting up – redeeming Coupons, Promos, Vouchers, Gift Cards and Certificates.

This training document will walk you through setting up your Coupon/Promo Code(s) Along with Gift Cards, Vouchers and Certificates for the purpose of online ordering and order fulfillment.

**You can mix and match different Promos, Coupons, Vouchers, Gift Cards and Certificates with any valid webstore Tender.*

Coupon & Promo Setup/Configuration

Menu Path POS-22-25-22

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ID	Description	Value	Start Dt	End Date
20OFF	20 % OFF	20.00	07/11/19	10/03/20
COUPON	COUPON 10.00\$	10.00	09/09/19	01/17/20
TWENTY	20% OFF	20.00	02/25/18	09/14/18

Maintain Coupon Parameters

Item not on file. Do you wish to add or copy?

Maintain Coupon Parameters

Coupon Code: 20OFF ?? Description * 20 % OFF

Tran/Item/Class* T Receipt Text* 20 % OFF

Redemption Value* 20.00 %/\$* % Min Purchase Amt* 10.00

Mfgr or Store Coupn* S Start Date* 07/11/19

Max # same coupon* 100 Ending Date* 10/03/20

Factor* 1

Valid with other coupons?* Y Apply to all qtys/same item? (Y/N)*

Markdown or Discount* D Max # Items this coupon can Redeem*

Identify any specific SKUs or Classes that are valid for this coupon:

##	Specific SKUs	Description	##	Beg. Class	End Class
1	100	??	900	??	??
2	??	??	??	??	??
		??	??	??	??
		??	??	??	??
		??	??	??	??
		??	??	??	??
		??	??	??	??

- You can add a new Coupon Code by either typing in and Select the “Add” or “Copy” Option. You can also modify any previous coupon. You can also use the standard period “.” for the next numeric sequence number. **If you modify coupons after a Web Order has been placed the modified coupon will not be applied to any suspended transactions only to new Orders.*
- You will need to fill-in all of the required fields. For detailed field information input a single question mark for more help.
- Selecting the “Tran/Item/Class” type of discount will determine your choices throughout the setup.
T=Tran type discounts will apply the discount to the whole order.
I=Item type discounts will apply the discounts to the “Specific SKUs” you list for the discount.
C=Class type discounts will use the table defined in the “Beg. Class – End Class”. **note if you are adding*

groupings of class codes you will need to make sure they are in sequential order, example: 100-200 600-700.

The CA option behaves the same as C but the discount will apply to all items in the defined class instead of just the first item added to the transaction.

- Choosing either the Mfgr or Store Coupon will make a difference on if the coupon is treated as a discount or as a tender amount.
 - A Manufacturer coupon will be treated as a TENDER amount and is normally issued by the manufacturer. As such it will decrease the balance due and will report as a tender amount.
 - A store coupon is issued by the store, maybe as a promotion to get people to shop at the store, and will be treated as a normal discount. These items will be treated as taxable, in other words, tax will be charged on the original retail amount before applying the coupon. The discount will be reported as any other discount.
- Min Purchase Amt* – The way this field is applied depends on the coupon type (Tran/Item/Class) you set up.
 - Transaction – The transaction Subtotal amount must meet the minimum, once the subtotal meets the minimum then the coupon will apply the coupon amount.
 - Item – The line item amount must meet the minimum before the discount will be applied. If the item sells for 10.00 and the minimum is 30.00 then the item will not apply unless the quantity is more than 3 to meet the 30.00 minimum. The coupon will only be applied 1 time regardless of how many items meet the minimum.
 - Class – The class must meet the minimum, the coupon will only be applied to the first item of the class. The total is not cumulative.
 - Class All – When the minimum is met by a cumulative of all the classes in the coupon then

the discount will be applied to the total amount for the valid classes or the dollar amount will be applied 1 time.

Applying Coupon(s) Promo(s)

During the Checkout process the online user will have the option to enter the Promo/Coupon Code that was setup. Users can add additional Codes using the instructions listed online.

Checkout - Shipping

Cart Details 

Item	Details	Quantity	Price	Extended
Training Item Documentation		1	\$11.00	\$11.00

Address Information 

Shipping Options 

Checkout Options 

Add any Gift Cards or Promo Codes you want to use (comma separated).

Gift Cards / Promo Codes **Submit**

Used Promo Code: 20OFF

Order Comments

We accept the following methods of payment.

- Visa
- Master Card
- Discover Card
- American Express
- Financial Aid

Please read the checkout policy before continuing. [Checkout Policy](#)

☐ I have read and agree with the checkout policy.

Cart Totals	
Subtotal	\$11.00
Shipping	\$0.00
Tax	\$0.00
Promo Codes	-\$2.20
Total	\$8.80

User

1 item

 Manage

Web:

Gra

Nei

Gir

Be

Sal

Cap

Tec

Dip

App

Dir

Lic

Kid

Kid

T-S

Wa

Gift

NIK

Tes

Search

 Search

Selecting the "Submit" Button will apply the Codes to the users cart.

Resuming Orders Promo/Coupon

From: TCS Demo Store <demostore@total-computing.com> ☆

Subject: Order Received

To: support@total-computing.com ★

Thank you for your order! Below is a copy of the order for your records.
Your Order Confirmation Number is: **133108**

Thank you!

SKU	Description	Author	Type	QTY	Price	Ext Price
3863	A.M. ARCHED LOGO T-SHIRT	GM	1	\$11.00	\$11.00	
GM - COLOR-OX/PINK/SIZE-S,M,L,XL,2X						

Transaction Totals.....	Order Information
Subtotal: \$11.00	Shipped Via: Instore Pickup
Taxes: \$0.00	Payment Info: *****
Shipping: \$0.00	Promo Code: 20OFF
Total: \$11.00	Device: DESKTOP

Shipping Instructions: **This is a test...**

Order Comments: **This is a test...No order comments**

TCS DEMO STORE

		Balance
		8.80

	Qty	Price	Extended
LOGO T-SHIRT	1	11.00	11.00
GM			
HANDLING	1	0.00	0.00
POS			
	1		

example

Modifier or Tender	Amount	SubTotal
0BL		11.00
		Disc/Mkdn
		Sales Tax
		Total

8.80

1-1 Add Mov Ins

CHECK	GIFT CARD	ABORT
DEBIT CARD	ONE CARD	TRAN DISC

- You will need to print Pick Slips or the email confirmation to see the type of Promo Code that your customer used at checkout.
- To enter a Promo/Coupon code, after selecting TOTAL, you need to select the 'coupon' key or int the 'Modifier or Tender' field enter CPN and press enter. You will then enter the promo/coupon code in the pop up box.
- Depending on the type of Promo/Coupon Code that was used on the online store will determine where the Code is applied in the transaction. See Gift, Voucher and Card Setup. to see how to check the types of Codes that are being used. *example: T=Transaction I=Item C=Class*

Adding and Maintaining Vouchers and Gift Certificates.

*See Gift, Voucher and Card Setup.

Redeeming Voucher, Certificates and Cards at Online Checkout.

During checkout the user will have the option to Apply Gift Cards, Certificates and/or Promo Codes.

Checkout - Shipping

Cart Details

Item	Details	Quantity	Price	Extended
Training Item Documentation		1	\$11.00	\$11.00

Address Information

Shipping Options

Checkout Options

Add any Gift Cards or Promo Codes you want to use (comma separated).

Gift Cards / Promo Codes

10001776

Submit

Used Card(s)

- Card 10001776: Amount used \$10.00, Balance Remaining \$0.00

Order Comments

We accept the following methods of payment.

- Visa
- Master Card
- Discover Card
- American Express
- Financial Aid
- Store Account

Please read the checkout policy before continuing. [Checkout Policy](#)

☐ I have read and agree with the checkout policy.

Cart Totals	
Subtotal	\$11.00
Shipping	\$0.00
Tax	\$0.00
Gift Cards	-\$10.00
Total	\$1.00

- When a valid Voucher is entered and applied using the "Submit" button the shopping cart will update and reflect the new total.
- The balance on the voucher will also be shown to the user on their checkout page.

**note that Vouchers, Gift Certificates and Cards follow the same rule as Credit Cards for Bookstore Clients. Funds are not changed until order fulfillment at the register.*

Resuming Orders Vouchers, Cards and

Certificates

From TCS Demo Store <demostore@total-computing.com> ☆
Subject **Order Received**
To support@total-computing.com ★

Thank you for your order! Below is a copy of the order for your records.
Your Order Confirmation Number is: **133109**

Thank you!

SKU	Description	Author	Type	QTY	Price	Ext Price
3863	A.M. ARCHED LOGO T-SHIRT	GM	1	\$11.00	\$11.00	
GM - COLOR-OX/PINK/SIZE-S,M,L,XL,2X						

Transaction Totals..... Order Information

Subtotal:	\$11.00	Shipped Via:	Instore Pickup
Taxes:	\$0.00	Payment Info:	*****
Shipping:	\$0.00	Promo Code:	10001776
Total:	\$11.00	Gift Card:	
		Device:	DESKTOP

Shipping Instructions: **This is a test...**

example

The screenshot shows the TCS Demo Store POS interface. At the top, it displays 'Sales Clerk: TCS SUPPORT', 'Tran Type: MO', 'Mail Order Sale', and 'Tran Number: 3219'. The 'Balance' is shown as 11.00. Below this is a table of items: 1 A.M. ARCHED LOGO T-SHIRT (Price 11.00, Extended 11.00) and 2 SHIPPING & HANDLING (Price 0.00, Extended 0.00). A pop-up window titled 'TCS DEMO STORE' is open, asking to 'Enter the Voucher number' and showing the number '10001776' entered. The bottom of the screen shows a 'Transaction Modifiers' table with '1 GC' entered, and a 'SubTotal' of 11.00. The 'Total' is also 11.00. At the bottom, there are buttons for 'CASH', 'EXIT', 'CHECK', 'GIFT CARD', 'ABORT', 'GO BACK', 'CREDIT CARD', 'DEBIT CARD', 'ONE CARD', and 'TRAN DISC'.

- You will need to print the order Pick Slip or the email confirmation to see the type of Voucher, Gift Certificate or Card that your customer used at checkout.
- To enter a Promo/Coupon code, after selecting TOTAL, you need to select the 'coupon' key or int the 'Modifier or Tender' field enter CPN and press enter. You will then enter the promo/coupon code in the pop up box.
- You can utilize the TCS standard types of Tender Codes and their rules e.g. Splitting Tenders between the Voucher, Gift Certificate or Card and other valid Tenders for web checkout.

**note you must be running webstore version 3.x.x or greater for these features to be available.*