

ORDER POWER!

Coupons and Promotions

User Guide

Release 4.0.2



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Solutions,
Inc.**

Since 1978

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ORDER POWER! Coupons and Promotions

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Coupons

In **ORDER POWER!**, as in common usage, a coupon is a discount ticket, usually found in an advertisement or flier, that a buyer can redeem for a discount. A **Promotion** is a **Coupon** that is predefined so that **ORDER POWER!** will offer the discount to the order-taker when its conditions are met.

Setting up Coupons

Setting up **Coupons** involves defining all the conditions of the discount being offered.

Steps for setting up Coupons	See page...
Define the Coupon record	2
Define the Coupon requirements	7

In the example that follows, we will define a coupon that appears in the local news. The coupon offer is: Buy a baseball cap, and receive another one for free. The coupon's limit is one order of 10 caps per customer, or a maximum value of \$100. The offer expires October 1, 2002.

Working with Coupons

1. From the **ORDER POWER! Main Menu**, select: **Work with Files** **o** **Coupon** **o** to display the *Coupon Code Inquiry panel (figure 1)*.

```

OP! 4.0 DEVELOPMENT * CO# 001
Coupon/Promotion Code Inquiry          Show Delete: _

Position to:
2=Change 5=Display 6=Ext Desc 7=Coupon Code Requirement
Coupon/Promotion Code      Description      Del
-   $1.00          Mary Maxim Test
-   $1.00OFF      $1.00 off merchandise
-   $1OFFEACH     $1 Off For Every Unit Ordered
-   $10 OFF ON LINE $10 Off On Line
-   $10OFF        $10 Off An Order
-   $100 OFF COUPON $100 off Any Merchandise
-   $100 OFF MERCH $100 off Merchandise
-   $100 OFF ORDER $100 Off Order
-   $2 DISC       $2 Discount
-   $2 OFF        $2 off the merchandise
-   $2 OFF ANYTHING $2 Off Any Item
-   $200 OFF      $200 off Order
-   $5            $5.00 Off Any Order Over $50
-   $5 DISC       $5 Discount
-   $5/20         $5 off of $25.00

More...
F1=Help F3=Exit F6=Create F7=Bkwd F8=Fwd F10=Top F12=Cancel F18=Bot F21=Print
    
```

Coupon Code Inquiry panel (figure 1)

These actions are available, in addition to the standard **ORDER POWER!** functions:

Action	Description
2=Change	Display <i>Coupon Code Prompt panel (figure 2)</i> to work with an existing Coupon
5=Display	Display the <i>Coupon Code Display window</i> similar to <i>Coupon Code Prompt panel (figure 2)</i> to view a <i>Coupon's set up</i>
6=Ext Desc	Display Extended Description Inquiry window (figure 5) to work with Coupon Extended Descriptions
7=Coupon Code Requirement	Display <i>Coupon Code Requirements window (figure 7)</i> to work with Coupon Requirements
F6=Create	Display <i>Coupon Code Prompt panel (figure 2)</i> to create a new Coupon

To create a new Coupon

1. From the *Coupon Code Inquiry panel (figure 1)*, press **F6** (Create) to display the *Coupon Code Prompt panel (figure 2)*.

OP! 4.0 DEVELOPMENT - CO# 001
 Coupon Code Prompt

Coupon Code

F1=Help F3=Exit F12=Cancel

Coupon Code Prompt panel (figure 2)

- 1a. Complete this field:

Coupon Code

Type a name (the code printed on the coupon itself) for the **Coupon**, or a descriptive name such as BUY/GET 1 FREE.

- 1b. Press **Enter** to display the *Coupon Code Update panel 1 (figure 3)*.

To change a Coupon

1. On the *Coupon Code Inquiry panel (figure 1)*, type **2** (Change) beside the **Coupon** code you want to work with, then press **Enter** to display *Coupon Code Update panel 1 (figure 3)*.

```

OP! 4.0 DEVELOPMENT - CO# 001
Coupon Code Update

Coupon Code
BUY/GET 1 FREE

Description Buy A Baseball Cap, Get 1 Free      # Issued _____

Coupon Type L L - Applies to Line, O - Applies to Order

Automatically offer in Order Entry _ Y/N

Min. Purchase $ _____ Applies to Purch. Up To $ _____
Max. Purchase $ _____
Minimum Quantity _____ Applies to Quantity _____
Expiration Date 10/01/01 Allow Override : $ Amt Y Y/N Expir. Date N Y/N
Merch. Maximum Value _____ 1.00 A A/P
S/H Maximum Value _____ - A/P
Misc. Max. Value #1 _____ - A/P
Misc. Max. Value #2 _____ - A/P
Personalization Value _____ - A/P

F1=Help F3=Exit F12=Cancel Delete _

```

Coupon Code Update panel 1 (figure 3)

2. Complete these fields:

Description

Type a description of the **Coupon** you are defining.

Issued

Type the number of coupons issued. You can use this information to calculate the percentage of coupons redeemed.

Coupon Type

Type the code that indicates whether this coupon applies to an entire order, or a specific line on the order.

- L coupon applies to a line
- O coupon applies to an order

Automatically offer in Order Entry

Type **Y**(es) or **N**(o) to indicate whether or not you want to if you want **ORDER POWER!** to automatically offer the **Coupon** you are defining (when it is applicable) in **Order Entry**. This is also known as a **Promotion**.

Min. Purchase \$

Type the minimum purchase amount that the coupon can be used against.

Applies to Purch. Up To \$

Type the maximum purchase amount that the coupon can be used against.

Max. Purchase \$

Type the maximum purchase amount that the coupon can be used against.

Minimum Quantity

Type the minimum purchase quantity that the coupon can be used against.

Applies to Quantity

Type the maximum purchase quantity that the coupon can be used against.



The amounts in these fields:
- **Min. Purchase \$**
- **Applies to Purch. Up To \$**
- **Minimum Quantity**
- **Applies to Quantity**
apply to either an order line, or an entire order, depending on the code used in the **Coupon Type** field.

Expiration Date

Type the last day that the coupon can be used.

Allow Override: \$ Amt

Type **Y**(es) to allow the order taker the ability to override the minimum purchase restriction during **Order Entry**.

Allow Override: Expir. Date

Type **Y**(es) to allow the order taker to override the **Expiration Date** restriction during **Order Entry**.

- 3. Complete each of the fields as instructed below. In the **A/P** field, indicate if each one represents an **A**(mount) or a **P**(ercentage).

Merch. Maximum Value

Type the maximum value that can be used against merchandise.

Misc. Max. Value #1

Type the maximum value that can be used against (user-defined) **Miscellaneous 1** field.

Misc. Max. Value #2

Type the maximum value that can be used against (user-defined) **Miscellaneous 2** field.

Personalization Value

Type the maximum value that can be used against **Personalization** charges.

- 3. Press **Enter** to display *Coupon Code Update panel 2* (figure 4).

```

OP! 4.0 DEVELOPMENT - CO# 001
Coupon Code Update

Coupon Code
BUY/GET 1 FREE

Per Customer:
1st Qualifying Order _____ Max # of Uses _____

Combine with Others Coupons N Y/N      ?Must Apply To Item CAP1

Deal:
?Item CAP1      ?whse _____      Quantity 1.000      Per Order Qty
Unit Price _____ Shipping & Handling _____ Allow Disc 1 _____ Allow Disc 2 _____
                                     A/P      N      N

Cpn Info 1 _____
Cpn Info 2 _____
Cpn Info 3 _____

F1=Help F3=Exit F4=?List F12=Cancel

```

Coupon Code Update panel 2 (figure 4)

- 2. Complete these fields:

Per Customer: 1st Qualifying Order

Type a number to indicate the first qualifying order, per customer, for which this coupon can be used.

Per Customer: Max # of Uses

Type a number to indicate the maximum number of times, per customer, this coupon can be used.

Combine with Others Coupons

Type **Y**(es) or **N**(o) to indicate whether or not you want to allow this coupon to be used in conjunction with others.

?Must Apply To Item

Type an **Item** number to restrict the coupon's use to a sale involving that **Item** only.

4. Complete the following fields that apply when a "Deal" is being offered. A **Deal** is price reduction (possibly free) on an **Item**.

Deal: ?Item

Type an **Item** number to select a **Deal Item** being offered with the purchase of the **Must Apply To Item** (see above).

Deal: ?Whse

Type an **Warehouse** number to select a **Warehouse** where the **Deal Item** is stored.

Deal: Quantity

Type the quantity of **Deal Item(s)** being offered if the **Deal** condition is met. When a **Deal Item** is offered, the minimum **Deal Quantity** is one (1).

Deal: Per Order Qty

The quantity of sale **Items** required to fulfill the deal.

Deal: Unit Price

Type the price of **Deal Item(s)** being offered if the **Deal** condition is met. Leave this field blank when the **Deal Item** is free.

Deal: Shipping & Handling

Type the value that can be used against **Shipping and Handling**. Indicate if this number represents an **A**(mount) or a **P**(ercentage).

Deal: Allow Disc 1 / 2

Type **Y**(es) or **N**(o) to indicate whether or not you want to permit the coupon may be combined with **Discount 1** and **Discount 2** defined for that **Item**.

Coupon Info fields fields 1, 2, and 3

These user-definable fields are used to collect miscellaneous information about each **Coupon**. The fields are defined in the **Company Profile** (see page 13) and can be inquired upon using search functions.

5. Press **Enter** to update the **Coupon** record.

To create a Promotion

A **Promotion** is a **Coupon** that is predefined so that **ORDER POWER!** will offer the discount to the order-taker when its conditions are met. To cause the display in **Order Entry**, complete the procedure detailed in the "To create a new Coupon" section on page 2. When you come to it, type **Y**(es) in the **Automatically offer in Order Entry** field on *Coupon Code Update panel 1 (figure 3)*. You can define any other requirements or conditions as you would for any **Coupon**.

Working with Coupon Extended Descriptions

A Coupon Extended Description in **ORDER POWER!** is free form text that you may choose to make available online for information purposes.

To work with Item Extended Descriptions

From *Coupon Code Inquiry* panel (figure 1), type **6** (Ext Desc) beside the **Coupon** you want to work with, then press **Enter** to display the *Extended Description Inquiry* window (figure 5).

```

OP! 4.0 DEVELOPMENT * CO# 001
Coupon/Promotion Code Inquiry          Show Delete: N

Position to:
2=Change 5=Display 6=Ext Desc 7=Coupon Code Requirement
Cou
$10OFF          Extended Descriptions Inquiry
$10 Off An Order
$1. Comment
$10 Code Extended Description          Line
6 $10 1 This coupon was advertised in    1
  $10 1 the Miami Herald only          2
  $10
  $10
  $10
  $2
  $2
  $2
  $20
  $5
  $5
  $5/
F1=Help F3=Exit F6=Create/Change F7=Bkwd F8=Fwd F9=Copy
F10=Top F12=Cancel F21=Print
F1=Help
  
```

Extended Description Inquiry window (figure 5)

These actions are available, in addition to the standard **ORDER POWER!** functions:

Action	Description
F6=Create/Change	Display <i>Item Extended Description Update</i> panel (figure 6) to work with the Item Extended Description
F16=Sort Sequence F16=Line Sequence	Toggles the display between sorting on the Comment Code and sorting on the line number

To create or change an Item Extended Description

1. On the *Extended Description Inquiry* window (figure 5), press **F6** (Create/Change) to display the *Item Extended Description Update* panel (figure 6).

A31 First Wives Club		** CSI 3.3 Development Co 1 ** Item Extended Description Update		Show Delete : <u>N</u>
?Comment Code	Extended Description	Deleted	Line #	
1	This coupon was advertised in	-	1	
1	the Miami Herald only	-	2	
		-	3	
		-	4	
		-	5	
		-	6	
		-	7	
		-	8	
		-	9	
		-	10	
		-	11	
		-	12	
		-	13	
		-	14	
		-	15	
		-	More...	

F1=Help F3=Exit F4=?List F7=Bkwd F8=Fwd F10=Top F12=Cancel F18=Bottom

Item Extended Description Update panel (figure 6)

Each line of the **Extended Description** must have its own **Comment Code**, even if it is actually a continuation of the line above it. Each line can also be deleted separately.

- Complete these fields:

?Comment Code

Type a user-defined code that you want to assign to a line of notes.

Extended Description

Type additional information about the **Coupon**. You can use as many lines as necessary.

Deleted

Type **D**(elete) beside the line(s) you want to delete.

- Press **Enter** to update the **Coupon Extended Description**.

Working with Coupon Requirements

Coupon Requirements specify more conditions under which the **Coupon** may or may not be used. For example, an offer might be valid only for a specific **Item** when presented by phone order.

- On the *Coupon Code Inquiry panel (figure 1)*, type **7** (Coupon Code Requirement) beside the **Coupon** you want to work with, then press **Enter** to display the *Coupon Code Requirements window (figure 7)*.



You can define as many Coupon Requirements as you need to reflect the terms of the advertised offer.

```

OP! 4.0 DEVELOPMENT - CO# 001
Position to: _____ Coupon Code Inquiry Show Delete: N
2=Change 5=Display
Coupon Code
Z BUY/GET 1 FREE
- B1 - LINE
- B1 - ORDER
- CANNOT USE
- CANNOTCOMBINE
- COUPON#1
- C1
- DEALCPN
- DEALCPN1
- DEALITEM
- DEB
- DEBBIE
- DS_BOOK
- DS_MEDIA
- DS_11 1/2 PRICE
F1=Help F3=Exit F6=C

```

```

BUY/GET 1 FREE Coupon Code Requirements Show Del: N
Buy A Baseball Cap, Get 1 Free
2=Change 5=Display
Type Key Code Req/ Den Del
1 Item CAP1 R
Bottom
F1=Help F3=Exit F6=Create F7=Bkwd F8=Fwd F10=Top
F12=Cancel F18=Bot

```

Coupon Code Requirements window (figure 7)

- Press F6 (Create) to display the Coupon Requirements Update window (figure 8).

```

OP! 4.0 DEVELOPMENT * CO# 001
Position to: _____ Coupon Code Inquiry Show Delete: N
2=Change 5=Display
Coupon Code
Z AWBPROM00
- A1
- A5
- BAND
- BONNIE
- BONNIELIN
- BONUS 15%
- BUY/GET 1
- B1 - LINE
- B1 - ORDE
- CANNOT US
- CANNOTCOM
- COUPON_20
- COUPON#1
- C1
F1=Help F3=EX

```

```

AWBPROMO0321 Coupon Code Requirements Show Del: N
Promotion 3/21/02
Coupon Code Requirements Update
AWBPROMO0321
Promotion 3/21/02
?Key Type
?Key Code
Delete _
F1=Help F3=Exit F4=?List F12=Cancel

```

Coupon Requirements Update window (figure 8)

- Complete these fields:

?Key Type

Type a code that describes the condition the buyer must meet to use the Coupon.

- Item
- Product Group only
- Group and Sub Group
- Media
- Book
- Order Origin
- Sub Group only

?Key Code

Type a user-defined code that specifies the exact terms of that condition, so different Codes apply to different Keys.

For example, if the **Key Type** selected is **1** (Item), the valid **Key Codes** are a list of **Items**. If the **Key Type** selected is **2** (Product Group), then the valid **Key Codes** are a list of **Product Groups**.

Required/Denied

Type **R**(equired) or **D**(enied) to indicate whether the **Coupon** *must* or *may not* be used with the condition described in the **Key Type** and **Code**.

Min Qty of Items

Type the minimum purchase quantity that the coupon can be used against.

Min Merch Purch

Type the minimum purchase amount that the coupon can be used against.

4. Press **Enter** to update the **Coupon Requirement** record.

Using Coupons and Promotions in Order Entry

Once you have defined a **Coupon** or **Promotion** in **ORDER POWER!**, you can apply them to an order in **Order Entry**. The difference between a **Coupon** and a **Promotion** is that the order-taker must actively request to use a **Coupon**. **ORDER POWER!** will offer a **Promotion** when its conditions are met.

To use Coupons in Order Entry

These steps are written for **ORDER POWER!** users already familiar with the existing **Order Entry** process.

1. In **Order Entry**, complete the order header information, then complete the following fields:

Item

Type the number of the **Item** that the **Coupon** applies to.

Quantity

Type the total number of units of this **Item** you are ordering.



The **Item** and **Quantity** fields refer to the **Must Apply to Item**, not the **Deal Item** (see page 5).

2. Press **Enter**, then press **F24** (More Opt) to display the *Additional Options window* (figure 9).

OP! 4.0 DEVELOPMENT * CO# 001			
Order #	117441	Order Entry Item Selec	
Customer #	9473		
CSI'S FAVORITE CUSTOMER			

	Qty	Item	Items Being Ordere Description
	1.000	BOBZILLA	4' Galapagos Iguan

Select Item ---			
?Item / Search words	Quantity	?Price	N/
N			
F1=Help F2=Unprotect F3=Exit F4=?List F9=Retrie			
F12=CncI F13=Prc Media F14=Cust Notes F16=Cust I			
F19=Qty Available F20=Totals F21=Fold F22=Delete			

Additional Options

1=Select

— Items Ordered

— Work with Coupons

— View Personalization

— Sold Outs Inquiry

— Order Statistics

— Change Ship Via

— Chg Sched Ship Date

— Crt Ord/Item Activity

— Activity Tracking Inq

— Item Extended Search

Bottom

Additional Options window (figure 9)

3. Type **1** (Select) beside **Work with Coupons**, then press **Enter** to display the *Coupon Entry window* (figure 10).

```

OP! 4.0 DEVELOPMENT * CO# 001

Coupon Entry
Order # 117441          Show Del: N
Current Total Value of Coupons: .00

1=Add 2=Change 4=Delete 6=Extended Description
Opt ?Coupon Code Description Expires Deleted
- $50FFREPTILES 5 Bucks Off Cold-Blooded Pet 3/22/02

Bottom

F3=Exit F4=?List F7=Bkwd F8=Fwd F10=Top F12=Cancel F18=Bottom

```

Coupon Entry window (figure 10)

- Complete these fields:

Opt

Type 1 (Select).

Coupon Code

Type a user-defined code for a **Coupon** that you have created.

- Press **Enter**. If the **Coupon** applies to a line item rather than the entire order, **ORDER POWER!** displays *Coupon Assignment window (figure 11)* to select which line the **Coupon** will be applied to. Otherwise, **ORDER POWER!** redisplay the *Order Entry Item Selection panel*.

```

OP! 4.0 DEVELOPMENT * CO# 001

Coupon Assignment
Order # 117441
Coupon Code $10 OFF ON LINE $10 Off On Line
Coupon Applies to 1 Item Only
Total Coupon .00

1=Applies to Item Deleted
Opt Ln Quantity Item Description Price
- 1 1 BOBZILLA 4' Galapagos Iguana 75.00
- 2 2 TRAINS Train and tracks II 12.00

Bottom

F3=Exit F7=Bkwd F8=Fwd F10=Top F11=Coupon Value F18=Bot

```

Coupon Assignment window (figure 11)

- Type 1 (Applies to Item) in the **Opt** field beside that line, then press **Enter** to redisplay the *Coupon Entry window (figure 10)*.
- Repeat steps 4 and 5 for any additional **Coupons**, then press **Enter** to redisplay the *Order Entry Item Selection panel*, and complete the remaining parts of the order as usual.

If the **Coupon** is a discount on the cost of the order, that is reflected on the **Order Totals** panel. If any **Deal Items** are included in the **Coupon**, **ORDER POWER!** automatically adds those to the order (at the appropriate charge).

To use Promotions in Order Entry

These steps are written for **ORDER POWER!** users already familiar with the existing **Order Entry** process.

1. In **Order Entry**, complete the order header information, then complete the following fields:

Item

Type the number of the **Item** that the **Coupon** applies to.

Quantity

Type the total number of units of this **Item** you are ordering.



The **Item** and **Quantity** fields refer to the **Must Apply to Item**, not the **Deal Item** (see page 5).

2. Press **Enter** to display *Promotions Selection window (figure 12)*. The *Promotions Selection window (figure 12)* displays automatically based on the criteria you set up when you defined that **Promotion**.

Order #	117441	OP! 4.0 DEVELOPMENT * CO# 001	Limit	
Customer #	9473	Order Entry Item Selection	Used	.00
CSI'S FAVORITE CU				

2=Change	4=Delet	Promotions Selection		
8=View Personaliz	Quantit	Order #	117441	
---	1.00	1=Add 4=Remove 5=Display 7=Display Requirements		
---	2.00	Opt Promotion	Description	Se1
---		- ASEPROM	Test ase promotion	
---		- AWBPRMO0321	Promotion 3/21/02	Y

?Item / Search wor		Bottom		
F1=Help	F3=Exit	F1=Help F3=Exit F12=Cancel		
F15=Orders				
F20=Totals				

Promotions Selection window (figure 12)

3. Type **1** (Add) beside the **Promotion** you want to use, then press **Enter**. Repeat for each **Promotion** you want to use, then press **Enter** again to redisplay the *Order Entry Item Selection panel*, and complete the remaining parts of the order as usual.

If the **Promotion** is a discount on the cost of the order, that is reflected on the **Order Totals** panel. If any **Deal Items** are included in the **Promotion**, **ORDER POWER!** automatically adds those to the order (at the appropriate charge).

Setting up Coupon Info fields in the Company Profile

The information you enter in the **Company Profile** customizes **ORDER POWER!** to meet your company's unique business requirements.

To set up Coupon Info fields in the Company Profile

1. From the **ORDER POWER! Main Menu**, select: **Work with Files** **Company Profile** **F15 (Maintenance)** **Coupons** to display *Company Profile Update Panel 14* (figure 13).

Company # 001	OP! 4.0 DEVELOPMENT * CO# 001 Profile Update	Panel 14
Coupons:		
Coupon Info Fields:		
1	Cpn Info 1	Mandatory Y Y/N
2	Cpn Info 2	Y Y/N
3	Cpn Info 3	Y Y/N
F1=Help F3=Exit F12=Cancel		

Company Profile Update Panel 14 (figure 13)

2. Complete the following fields:

Coupon Info Fields 1, 2, and 3

Type names for three 10-character user-defined fields that are used by many functions of **ORDER POWER!**. The first of these fields can be inquired upon using search functions.

Mandatory

Type **Y**(es) or **N**(o) to indicate whether the operator is required to fill the respective **Coupon Info Field** when you are creating a **Coupon** (see the Coupon Info fields fields 1, 2, and 3 on page 5)S.

3. Press **Enter** to update the **Company Profile**.

