

How-To Guide Configuring Coupons

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Introduction

The purpose of this guide is to provide a foundational understanding of the options and capabilities of Coupons. The use of Coupons provides the retailer a flexible method to issue a document or code that can be used as a promotion trigger on a future purchase.

Overview

The following concepts will be used to configure Coupons:

- Product Configuration
- Promotion Configuration

Prerequisites

Resources

Before starting, you should have the following resources in place:

- Enactor Estate Manager
- Enactor POS (configured within the UK Region, connected to the Estate Manager)
- Standard Configuration, including:
 - Base Configuration
 - UK Retail (I have used UK in this example, but it could be other regional config packs.)
- Regionally appropriate data including Product, Localisation, Tenders, etc.

Prior Training/Experience

You should be familiar with the following:

- Estate Manager configuration
- Enactor configuration concepts, including Locations, POS Terminals, Products, Promotions, Tenders, Discounts etc.
- Data broadcasting
- Standard POS Sales processes

Coupons

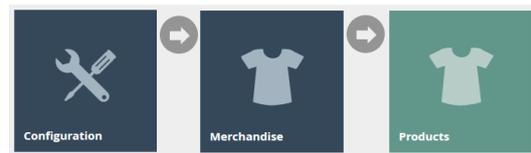
Coupons are a mechanism used to convey a discount or offer to a customer. Historically, Coupons were a printed document that were surrendered at the time of use but are now frequently issued digitally or as a short code to be used during online checkout. Coupons can be distributed externally from Enactor or issued at POS as a Promotion Reward Type. Coupon redemption is processed through the Enactor Promotions Engine where the Coupon Product is used as an item that is required to qualify for the Promotion.

Configuration

Coupon Product

To facilitate the use of the Promotions Engine for Coupon redemption, each Coupon is associated with a Promotional Coupon Product which is used as a qualifying item in the redemption offer. The basics of Promotional Coupon Product configuration mimic those of Merchandise Product configuration.

Access Product Maintenance using the Products option, obtained via the selection sequence shown at right, starting from the Main Menu:



Product Maintenance ? || X

Product ID	Starts With <input type="text"/>	Description	Starts With <input type="text"/>	Hide
Product Type	Style Colour Size Product	Product Group	-	
Brand	-	MM Group	-	
Fascia	-	Range	-	
Supplier	-	Supplier Product ID	Starts With <input type="text"/>	
Selling Code	Starts With <input type="text"/>			

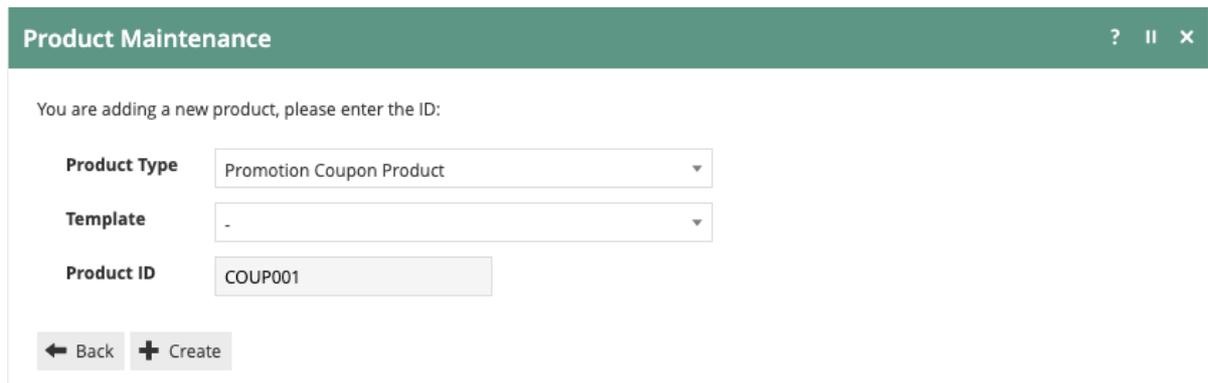
Apply Filters | Reset Filters

	Product ID	Product Description
	DF517XM	Button Down Collar Western Sh
	ID816BN	Ben Sherman Short Oxford
	KD092JS	Nike Capri Trainer
	MB229XM	Crinkle Day Dress
	MB7095N	Rose Print Tea Dress
	NL117CN	Love Heart Hard Cased Clutch
	NL616HN	Envelope Handbag
	SPS901	Hugo Men's Glasses
	VV639JS	Vans Canvas Shoes

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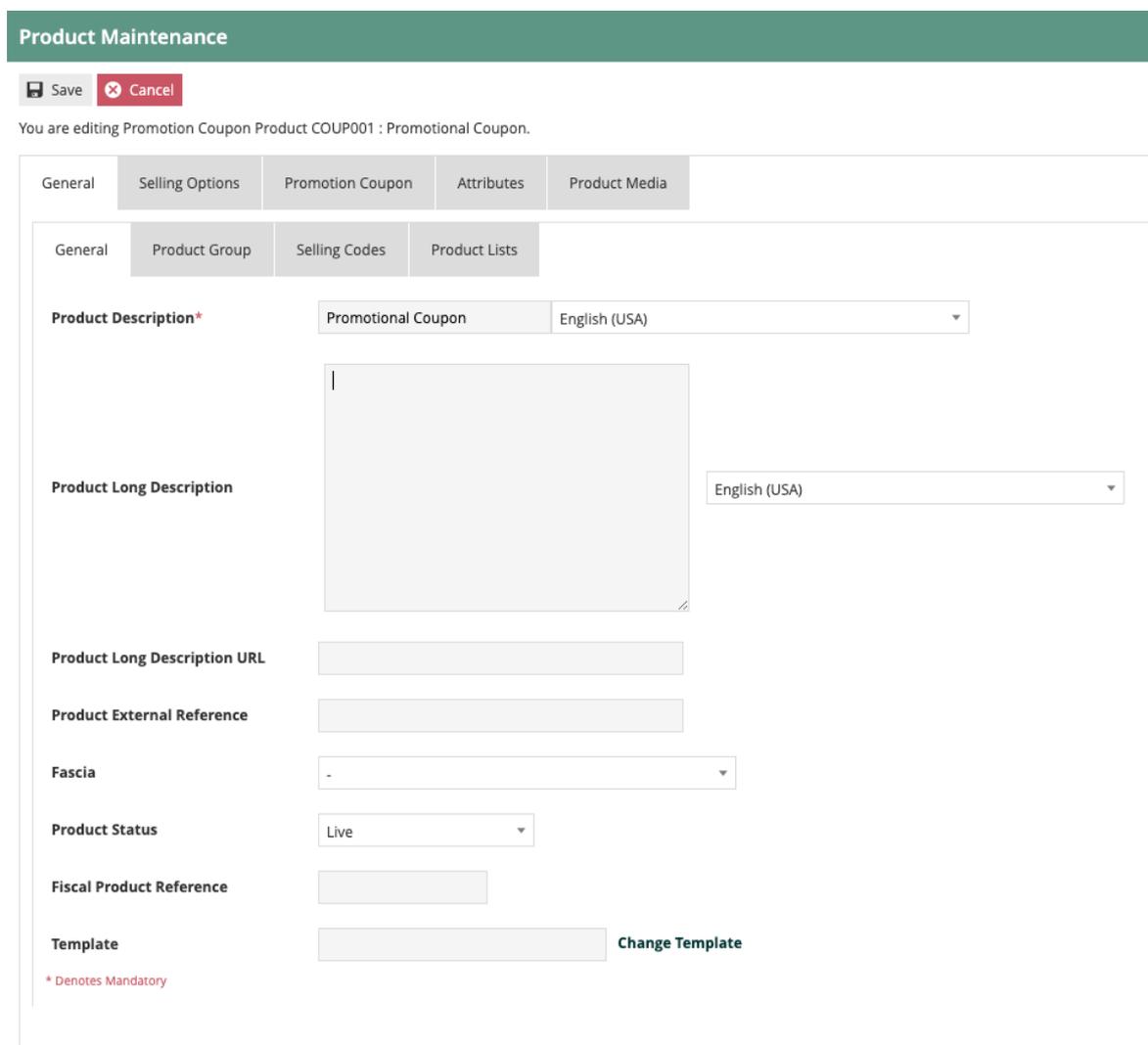
+ Create a new Product | Export Products

On the Product Maintenance page, select “Create a new Product”.



The screenshot shows the 'Product Maintenance' interface with a green header. Below the header, there is a message: 'You are adding a new product, please enter the ID:'. The form contains three fields: 'Product Type' with a dropdown menu set to 'Promotion Coupon Product', 'Template' with a dropdown menu set to '-', and 'Product ID' with a text input field containing 'COUP001'. At the bottom left, there are two buttons: 'Back' with a left arrow icon and 'Create' with a plus icon.

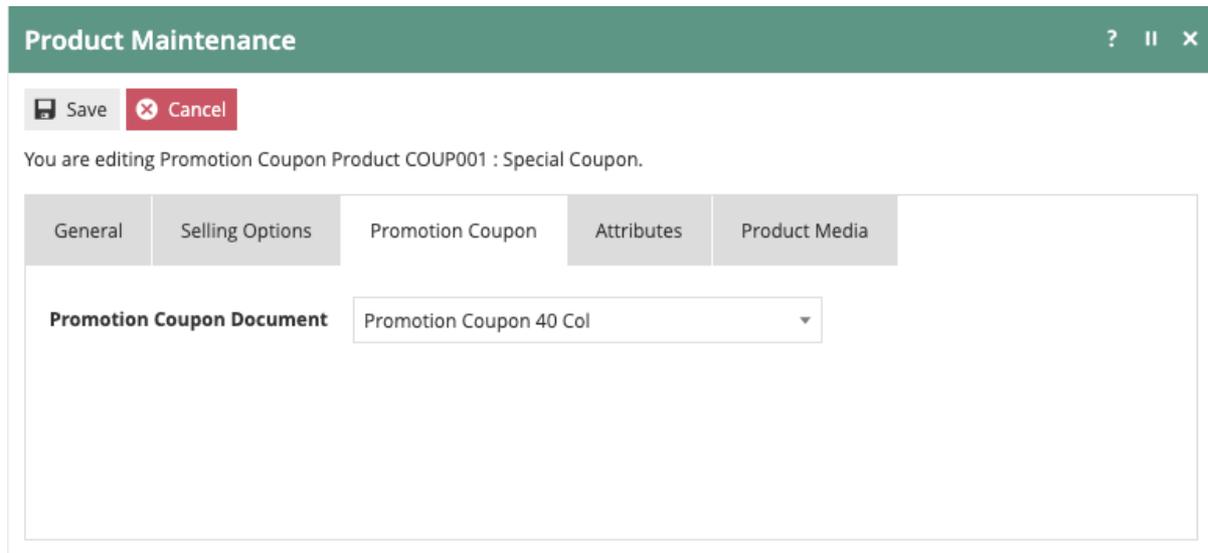
Select Promotional Coupon Product from the Product Type dropdown and enter the desired Product ID.



The screenshot shows the 'Product Maintenance' interface with a green header. Below the header, there are two buttons: 'Save' and 'Cancel'. A message reads: 'You are editing Promotion Coupon Product COUP001 : Promotional Coupon.'. The interface has a tabbed layout with tabs for 'General', 'Selling Options', 'Promotion Coupon', 'Attributes', and 'Product Media'. The 'General' tab is active, and it has sub-tabs for 'General', 'Product Group', 'Selling Codes', and 'Product Lists'. The 'General' sub-tab is active. The form contains several fields: 'Product Description*' with a dropdown set to 'Promotional Coupon' and a language dropdown set to 'English (USA)'; 'Product Long Description' with a large text area and a language dropdown set to 'English (USA)'; 'Product Long Description URL' with a text input field; 'Product External Reference' with a text input field; 'Fascia' with a dropdown menu set to '-'; 'Product Status' with a dropdown menu set to 'Live'; 'Fiscal Product Reference' with a text input field; and 'Template' with a text input field and a 'Change Template' button. A red asterisk note at the bottom left states: '* Denotes Mandatory'.

The basics of configuring a Promotional Coupon Product are the same as a Merchandise Product which are described in the configuration guide on Product setup. The only setting unique to the Promotional Coupon Product type is found on the Promotion Coupon tab.

Select the desired Promotion Coupon Document from the dropdown which will be used when a Coupon is issued from POS.



The screenshot shows a software window titled "Product Maintenance" with a green header bar. Below the header, there are "Save" and "Cancel" buttons. A message states, "You are editing Promotion Coupon Product COUP001 : Special Coupon." Below this, there are five tabs: "General", "Selling Options", "Promotion Coupon", "Attributes", and "Product Media". The "Promotion Coupon" tab is active. Under this tab, there is a label "Promotion Coupon Document" and a dropdown menu currently displaying "Promotion Coupon 40 Col".

No offer-related configuration is done within the Promotion Coupon Product setup.

It is worth noting that the Promotion Coupon Product Type supports the use of multiple Selling Codes in the same manner as regular Merchandise Product. A retailer may find this especially useful when setting up a Promotion Coupon Product. While a complex Selling Code presented in the form of a barcode may be suitable for store use, a short code can also be assigned for use with e-commerce checkout. Additionally, retailers can use different selling codes to represent different distribution methodologies for the same offer. This can help the retailer understand the various response rates without creating multiple versions of the same offer.

Issuing Coupons

Coupons can be issued at the POS by creating a Promotion using the Promotion Coupon Promotion Type. The Promotion Coupon Promotion Type is available with transaction or item-based offers. Promotion qualification is configured in the same way as with other Promotion Types. Please refer to the configuration guide on Promotions for more information.

Promotion Maintenance

Save Cancel

You are editing Item Set '1' for Promotion 'EARNCOUP1' for Region 'All Regions'.

Type	Threshold	Products	Context	Brands	Product Groups	MM Groups	Prices
Description*	<input type="text" value="Coupon"/>						
Promotion Type*	<input type="text" value="Promotion Coupon"/>						
Promotion Coupon Product ID*	<input type="text" value="COUP001"/>		<input type="button" value="Select Product"/>				

* Denotes Mandatory

After selecting the Promotion Coupon Promotion Type, enter the Promotional Coupon Product ID. If the ID is not known, click the magnifying glass icon which will open Product Maintenance to facilitate searching for the item.

Product Search

Product ID: Description: Hide

Product Type: Product Group:

Brand: MM Group:

Fascia: Range:

Colour: Size:

Style ID: Selling Code:

Apply Filters Reset Filters

	Product ID	Product Description
<input type="button" value="eye"/> <input type="button" value="pencil"/> <input type="button" value="info"/> <input type="button" value="arrow"/>	COUP001	Special Coupon

Page 1 of 1 Page Size:

Back

Once the Product ID has been found, click the arrow to return to the Promotion Maintenance application and complete any remaining aspects of Promotion configuration.

When the Promotion is triggered during a sale, a Coupon will be printed using the Promotion Coupon Document selected during Product setup. Be aware that since the Promotion Coupon Promotion Type does not modify any basket items, there is no indication within POS that the offer has been triggered. If a notification is desired, use the Force Acknowledge Triggered Alert option along with the Triggered Alert Message in Promotion setup on the General – General tab.

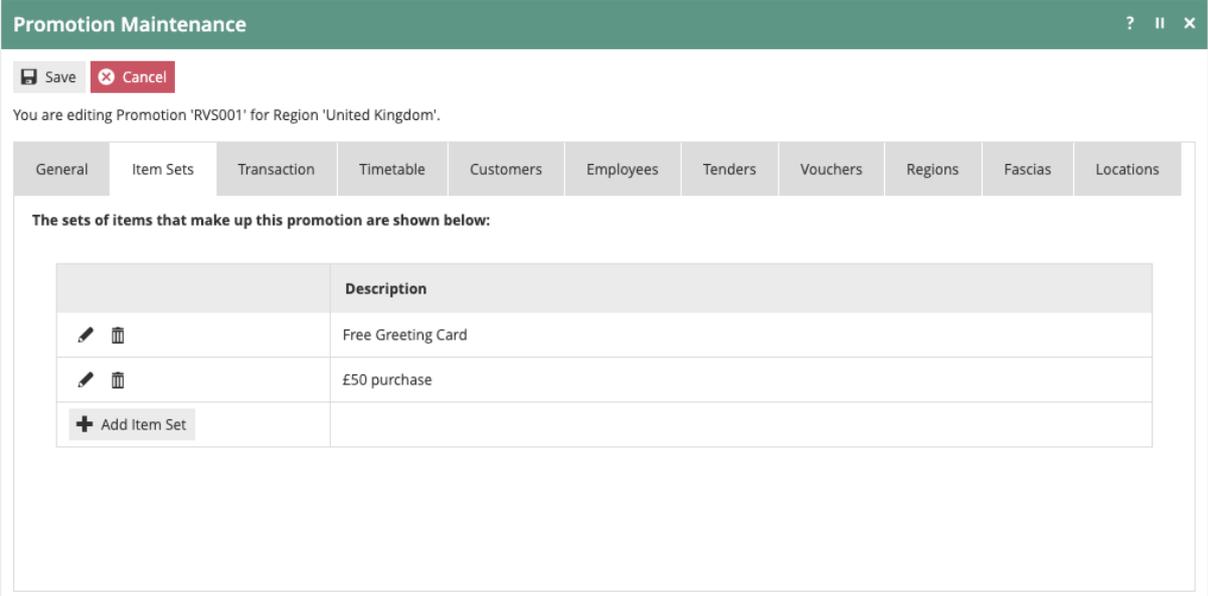


While Coupons are similar to Vouchers, one important difference is that Coupons do not have the ability to be tracked. Since Coupons are not tracked, they are not associated with a known Customer and will not appear on the Rewards tab of the Customer record.

Redeeming Coupons

Coupons are redeemed by using them as a qualifying condition on a Promotion. This allows the maximum flexibility in determining what types of offers can be triggered by a Coupon. A Coupon triggers an offer by adding the Promotion Coupon Product as an Item Set within the Promotion.

To setup a Promotion to be triggered by a Coupon, begin by completing the standard Promotion setup using Item Sets or Transaction Promotions. For additional information about Promotions, refer to the configuration guide on setting up Promotions.



The screenshot shows the 'Promotion Maintenance' interface. At the top, there is a green header bar with the title 'Promotion Maintenance' and icons for help, full screen, and close. Below the header, there are 'Save' and 'Cancel' buttons. A message states: 'You are editing Promotion 'RV5001' for Region 'United Kingdom'.'. Below this is a tabbed interface with the following tabs: General, Item Sets (selected), Transaction, Timetable, Customers, Employees, Tenders, Vouchers, Regions, Fascias, and Locations. Under the 'Item Sets' tab, a message reads: 'The sets of items that make up this promotion are shown below:'. Below this message is a table with two columns: an icon column and a 'Description' column. The table contains two rows of item sets and an 'Add Item Set' button at the bottom.

	Description
 	Free Greeting Card
 	£50 purchase
 Add Item Set	

The Promotion shown above uses Item Sets and is configured to provide a Greeting Card free when the customer spends £50.

As seen in POS, the Promotion is triggered when all items are added to the basket:

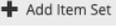
The screenshot shows the enactor POS interface. At the top, there's a navigation bar with 'enactor' logo, 'HOME', 'PRODUCTS', and user information: 'Trans - 118', 'Mar 23, 2021 4:06:20 PM', 'Till 26 - Mike Carrell', and 'LOG OUT'. Below this is a table of items in the basket:

ITEM	SIZE	PRICE
 Stuffed Bear		£24.99
 Get Well Bouquet		£49.95
 Greeting Card		£4.95
Free Greeting Card with £50 Purchase		-£4.95

On the right side, there's a prompt: 'Please scan or enter a product or select another function.' Below it is a numeric keypad with buttons for digits 0-9, a decimal point, and 'CLR'. A large green button labeled 'TOTAL' is at the bottom right, showing a total of £74.94. At the bottom left, there are navigation buttons for 'Sales', 'Loyalty', 'Voids', 'Returns', 'Discount / Overrides', 'Management', 'Orders', and 'SignOff'.

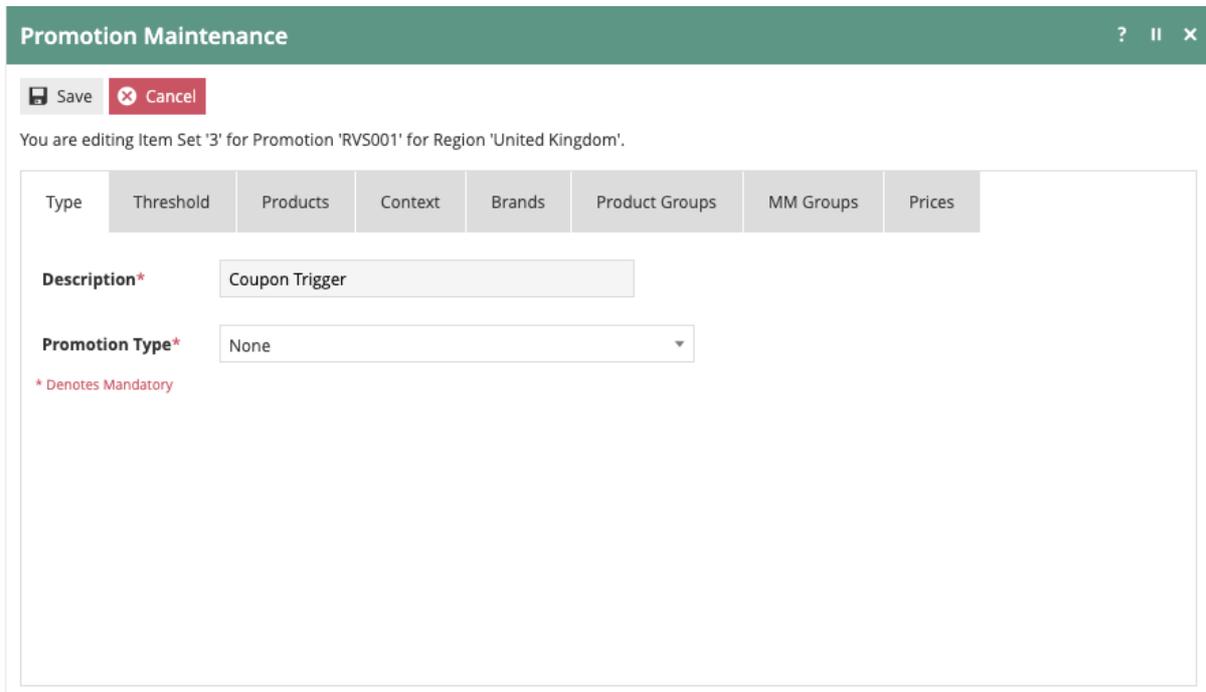
To require the Coupon, an additional item set is needed.

The screenshot shows the 'Promotion Maintenance' screen. At the top, there's a green header with 'Promotion Maintenance' and icons for help, pause, and close. Below the header, there are 'Save' and 'Cancel' buttons. A message states: 'You are editing Promotion 'RVS001' for Region 'United Kingdom'.' Below this is a tabbed interface with tabs for 'General', 'Item Sets', 'Transaction', 'Timetable', 'Customers', 'Employees', 'Tenders', 'Vouchers', 'Regions', 'Fascias', and 'Locations'. The 'Item Sets' tab is selected, and it displays the following table:

	Description
 	Free Greeting Card
 	£50 purchase
	

Click 'Add Item Set'.

When creating the Item Set, provide a meaningful Description and leave the Promotion Type set as None.

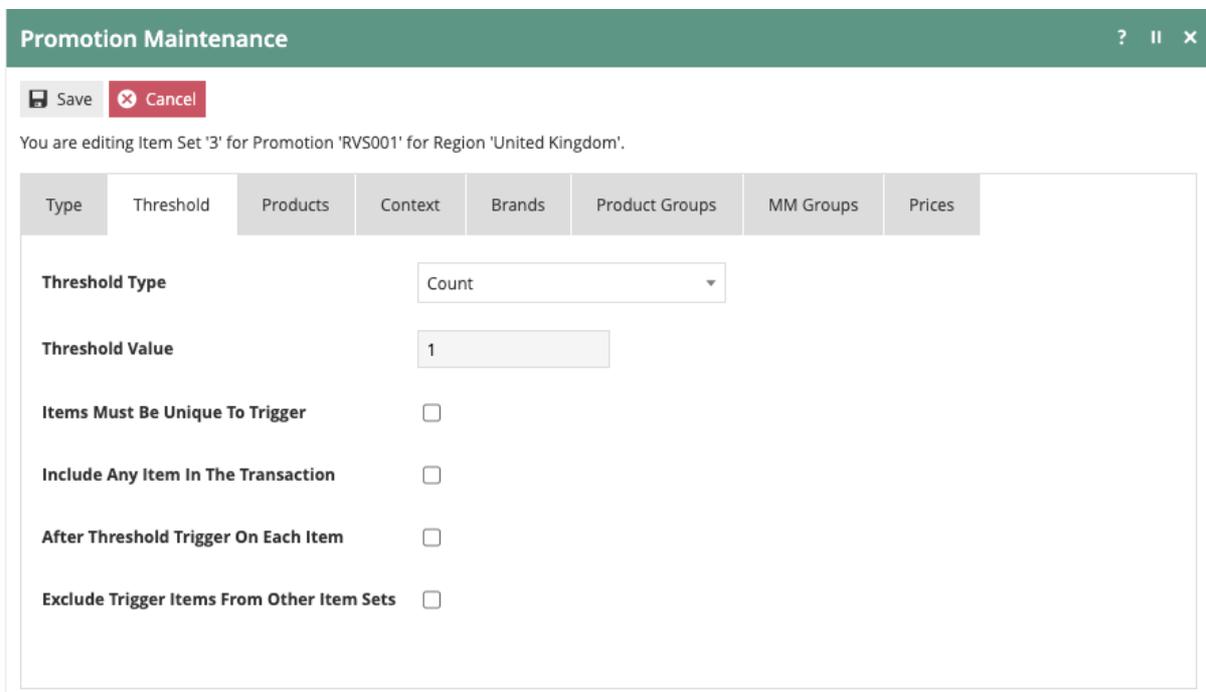


The screenshot shows the 'Promotion Maintenance' window with the 'Type' tab selected. The window title is 'Promotion Maintenance' and it includes a 'Save' button and a 'Cancel' button. Below the buttons, a message states: 'You are editing Item Set '3' for Promotion 'RVS001' for Region 'United Kingdom''. The 'Type' tab is active, and the 'Description*' field contains 'Coupon Trigger'. The 'Promotion Type*' dropdown menu is set to 'None'. A red asterisk indicates that these fields are mandatory.

Type	Threshold	Products	Context	Brands	Product Groups	MM Groups	Prices
Description*	Coupon Trigger						
Promotion Type*	None						

* Denotes Mandatory

On the Threshold tab, set the Threshold Type to Count and the Threshold Value to 1.



The screenshot shows the 'Promotion Maintenance' window with the 'Threshold' tab selected. The window title is 'Promotion Maintenance' and it includes a 'Save' button and a 'Cancel' button. Below the buttons, a message states: 'You are editing Item Set '3' for Promotion 'RVS001' for Region 'United Kingdom''. The 'Threshold' tab is active, and the 'Threshold Type' dropdown menu is set to 'Count'. The 'Threshold Value' field contains '1'. There are five checkboxes, all of which are unchecked: 'Items Must Be Unique To Trigger', 'Include Any Item In The Transaction', 'After Threshold Trigger On Each Item', and 'Exclude Trigger Items From Other Item Sets'.

Type	Threshold	Products	Context	Brands	Product Groups	MM Groups	Prices
Threshold Type	Count						
Threshold Value	1						
Items Must Be Unique To Trigger	<input type="checkbox"/>						
Include Any Item In The Transaction	<input type="checkbox"/>						
After Threshold Trigger On Each Item	<input type="checkbox"/>						
Exclude Trigger Items From Other Item Sets	<input type="checkbox"/>						

Select the Products tab to enter the Promotion Coupon Product information.

The screenshot shows the 'Promotion Maintenance' window. At the top, there are 'Save' and 'Cancel' buttons. Below that, a message states: 'You are editing Item Set '3' for Promotion 'RVS001' for Region 'United Kingdom'.'. A navigation bar contains tabs for 'Type', 'Threshold', 'Products', 'Context', 'Brands', 'Product Groups', 'MM Groups', and 'Prices'. The 'Products' tab is active, and it has sub-tabs for 'Included Products' and 'Excluded Products'. A message reads: 'This is the list of products currently included in the promotion:'. Below this is a table with three columns: 'ID', 'Description', and an action column. The first row shows a trash icon, 'COUP001', and 'Special Coupon'. The second row shows a plus icon and 'Add Product ID', an empty input field, and a magnifying glass icon with 'Select Products'.

	ID	Description
	COUP001	Special Coupon
Add Product ID	<input type="text"/>	Select Products

On the Included Products tab, enter the Promotion Coupon Product ID(s) and click 'Add Product ID'. If you are unsure of the Product ID, click on the magnifying glass to open the Product Maintenance screen and search for the correct item. Save the Item Set and Promotion.

Now at POS, the Promotion is no longer triggered only by adding the items:

enactor  HOME  PRODUCTS  Trans - 119
Mar 23, 2021 4:22:06 PM
Till 26 - Mike Carrell  LOG OUT

ITEM	SIZE	PRICE
 Stuffed Bear		£24.99
 Get Well Bouquet		£49.95
 Greeting Card		£4.95

Please scan or enter a product or select another function.

7	8	9	CLR
4	5	6	ENT
1	2	3	
0	.		

Sales	Loyalty	Voids	Returns
Discount / Overrides	Management	Orders	SignOff

TOTAL £79.89

TOTAL

The Promotion Coupon Product specified in the Item Set must now be added to the transaction to trigger the Promotion.

enactor
HOME
PRODUCTS
Trans - 123
Mar 23, 2021 4:43:19 PM
Till 26 - Mike Carrell LOG OUT

ITEM	SIZE	PRICE															
Stuffed Bear		£24.99	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;">Please scan or enter a product or select another function.</div> <div style="border: 1px solid #ccc; height: 30px; margin-bottom: 10px;"></div> <table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <tr> <td style="width: 25px;">7</td> <td style="width: 25px;">8</td> <td style="width: 25px;">9</td> <td style="width: 25px;">CLR</td> </tr> <tr> <td>4</td> <td>5</td> <td>6</td> <td rowspan="3" style="background-color: #00aaff; color: white; font-weight: bold;">ENT</td> </tr> <tr> <td>1</td> <td>2</td> <td>3</td> </tr> <tr> <td>0</td> <td>.</td> <td></td> </tr> </table>	7	8	9	CLR	4	5	6	ENT	1	2	3	0	.	
7	8	9		CLR													
4	5	6		ENT													
1	2	3															
0	.																
Get Well Bouquet		£49.95															
Greeting Card		£4.95															
		Free Greeting Card with £50 Purchase															
		Special Coupon															

Sales	Loyalty	Voids	Returns
Discount / Overrides	Management	Orders	SignOff

TOTAL £74.94

TOTAL

About This Document

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The amendment history of this document can be found in the table below.

Current Document Version information

Document Context

This document is part of the Enactor Product Documentation Series. All Enactor products include a comprehensive documentation set designed to improve understanding of the product and facilitate ease of use.

Document Inquiries

At Enactor we aspire to producing the highest quality documentation to reflect and enhance the quality of our product. If you find that the document is inaccurate or deficient in any way, please assist us in improving our standard by letting us know.

For matters of document quality or any other inquiries regarding this document please contact:

By Email: documentation@enactor.co.uk

Document History

The following versions of the document have been produced:

VERSION	STATUS	ISSUE DATE	AUTHOR	REASON FOR ISSUE
1.0	Initial Draft	24 March 2021	Michael Tolson	Initial Version