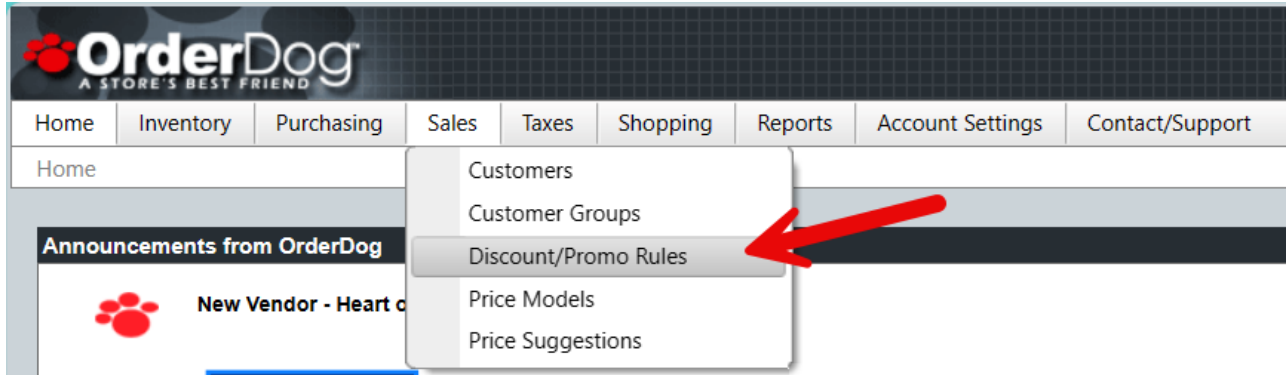




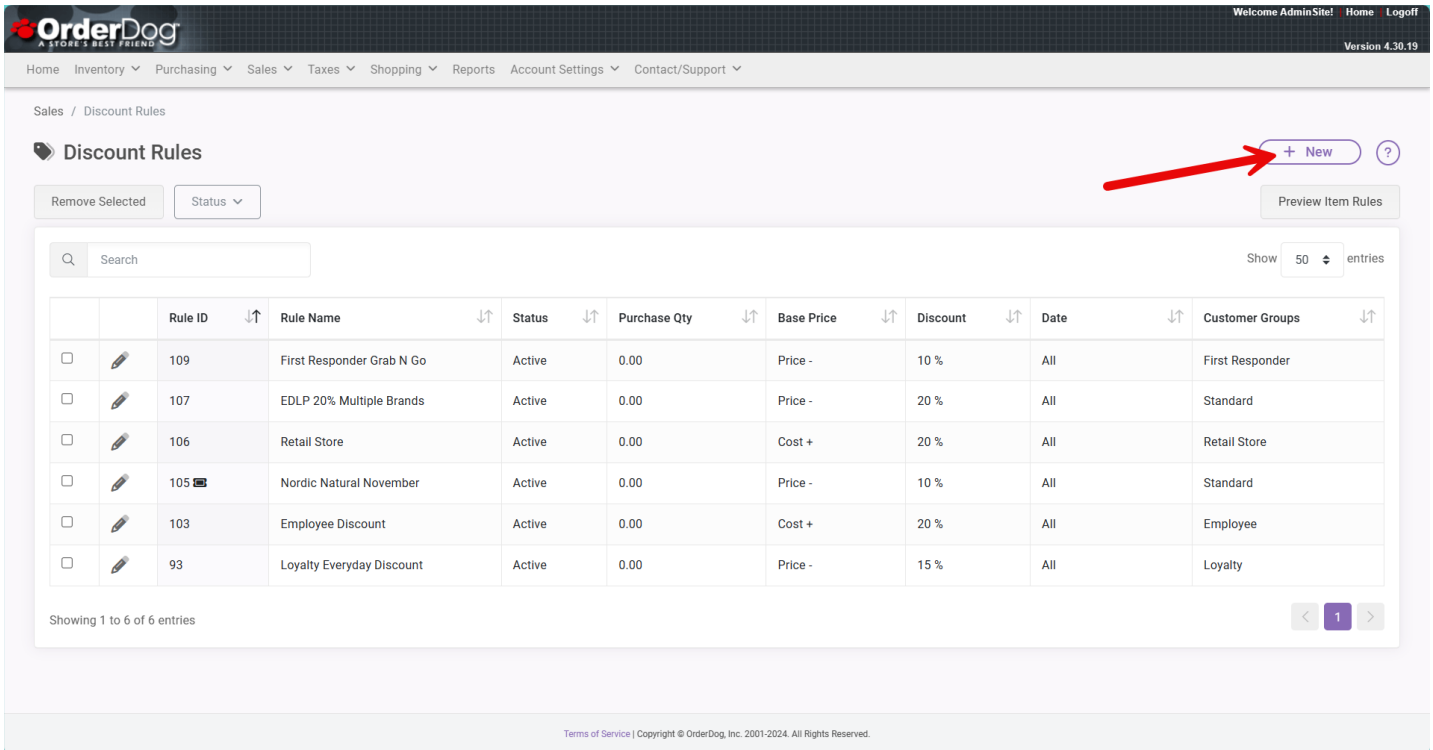
Creating a Discount Rule for a Customer Group

User Guide > Discount Rules

1. Starting on the OrderDog portal, navigate under “Sales” and select “Discount/Promo Rules”.



2. This is the “Discount Rules” page. Here, you can create and edit all your discount rules. Click the “New” button in the upper right-hand corner to create a discount rule.



3. First, fill out the following according to your preferences:
 - a. Rule name
 - b. Discount Formula – Using “Regular Price”, choose the percent amount that will be taken off items under this rule. You can also choose if the amount is rounded as well.
 - c. Minimum Purchase Qty – Leave this as “0.00” if the discount should apply every time the item is rang up. Change it to “1.00” if the customer needs to buy an additional one before the discount will take effect. Similarly, any number higher than “0.00” will function in this way.

Sales / Discount Rules / Discount Rule - A...

Discount Rule - Add

Discount Details

Is Rule Active?

Rule name
Senior Discount

Discount Formula
Regular Price - 10 % Nearest 5

Minimum Purchase Qty
0.00

Discount Conditions

Effective Dates Coupon Customers Departments Brands Items

Discounts can be setup for continuous use, one-time use or recurring

- For continuous use, select Always
- For one-time use, select Use Date Range and enter dates the discount will be applied
- For recurring use, select either Weeks of the Month or Days of the Week and choose when the recurring discount will be applied

4. Now, let's set the "Discount Conditions".
- Effective Dates – Discounts can be setup for continuous use, one-time, or recurring. "Always" means that the discount will always be active, on every day of the week. "Use Date Range" means that your discount will not be active outside of the selected date range. "Use Weeks of the Month" or "Use Days of the Week" will make the discount always active, but only on certain weeks of the month, or days of the week.

Discount Conditions

Effective Dates Coupon Customers Departments Brands Items

Discounts can be setup for continuous use, one-time use or recurring

- For continuous use, select Always
- For one-time use, select Use Date Range and enter dates the discount will be applied
- For recurring use, select either Weeks of the Month or Days of the Week and choose when the recurring discount will be applied

Frequency

Always

- Coupon – Here, you can enter a code you would like customers to enter first before getting access to the discount, if applicable to the rule.

Discount Conditions

Effective Dates Coupon Customers Departments Brands Items

Enter a code to create a coupon that customers can use when checking out

- Customers – Every customer group that is found under the "Included" section will have this discount applied to them. Any customer group not found on the list will be excluded from the discount. Use the drop down menu to select which customer groups you would like to include.

Discount Conditions

Effective Dates Coupon Customers Departments Brands Items

- To include ALL customers, choose every group from dropdown and select Include
- To include ONLY certain groups, choose from dropdown and select Include

Select

Standard Include

Included

Senior

- d. Departments– All departments are included by default. If you would like to include only certain departments, search the department(s) you would like to include in the dropdown menu and select “Include”. Do this until all included departments have been added to the list. To exclude certain departments, use the dropdown menu again, and click “Exclude” for each department you would like to exclude.

Discount Conditions

Effective Dates Coupon Customers Departments Brands Items

All departments are included by default. Leave blank to include all departments

- To include ONLY certain departments, enter the department and select Include. This discount will apply ONLY to the departments listed as Included
- To exclude certain departments, enter the department and select Exclude. This discount will apply to all departments EXCEPT those listed as Excluded

Select

Include Exclude

Included Excluded

- e. Brands – All brands are included by default. Use the “Included” and “Excluded” lists as explained in the “Departments” section until all brands have been sorted as desired.

Discount Conditions

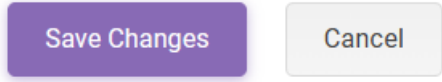
The screenshot shows the 'Brands' tab selected in the 'Discount Conditions' interface. At the top, there are navigation tabs: 'Effective Dates', 'Coupon', 'Customers', 'Departments', 'Brands', and 'Items'. Below the tabs is a light blue informational box with the following text: 'All brands are included by default. Leave blank to include all brands'. It contains two bullet points: 'To include ONLY certain brands, enter the brand and select Include. This discount will apply ONLY to the Brands listed as Included' and 'To exclude certain brands, enter the brand and select Exclude. This discount will apply to all brands EXCEPT those listed as Excluded'. Below this is a search section with a text input field labeled 'Brand name' and two buttons: 'Include' and 'Exclude'. At the bottom, there are two empty list containers labeled 'Included' and 'Excluded', each with a vertical scrollbar and a red 'x' icon on the right side.

- f. Items - All items are included by default. Use the “Included” and “Excluded” lists as explained in the “Departments” section until all items have been sorted as desired.

Discount Conditions

The screenshot shows the 'Items' tab selected in the 'Discount Conditions' interface. At the top, there are navigation tabs: 'Effective Dates', 'Coupon', 'Customers', 'Departments', 'Brands', and 'Items'. Below the tabs is a light blue informational box with the following text: 'All items are included by default. Leave blank to include all items'. It contains two bullet points: 'To include ONLY certain items, enter the item and select Include. This discount will apply ONLY to the items listed as Included' and 'To exclude certain items, enter the item and select Exclude. This discount will apply to all items EXCEPT those listed as Excluded'. Below this is a search section with a dropdown menu labeled 'Select an item...' and two buttons: 'Include' and 'Exclude'. At the bottom, there are two empty list containers labeled 'Included' and 'Excluded', each with a vertical scrollbar and a red 'x' icon on the right side.

5. Double check that your initial discount formula and discount conditions are all accurate. Press “Save Changes” once you have confirmed that everything looks good.



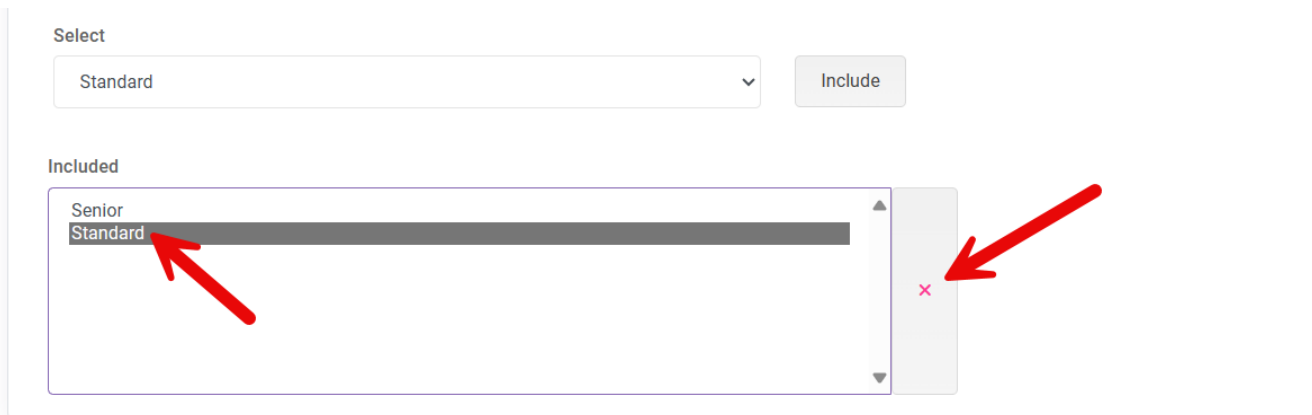
6. When you need to update your discount rules, you can click on the pencil icon next to the discount rule you wish to edit and update the details as described above.

The screenshot shows the "Discount Rules" interface. At the top right, there is a "+ New" button and a help icon. Below that are "Remove Selected" and "Status" dropdown menus, and a "Preview Item Rules" button. A search bar is present with the text "Search". The table has columns for Rule ID, Rule Name, Status, Purchase Qty, Base Price, Discount, Date, and Customer Groups. The table contains 7 entries. A red arrow points to the pencil icon next to the rule with ID 92, "Senior Discount".

		Rule ID	Rule Name	Status	Purchase Qty	Base Price	Discount	Date	Customer Groups
<input type="checkbox"/>		109	First Responder Grab N Go	Active	0.00	Price -	10 %	All	First Responder
<input type="checkbox"/>		107	EDLP 20% Multiple Brands	Active	0.00	Price -	20 %	All	Standard
<input type="checkbox"/>		106	Retail Store	Active	0.00	Cost +	20 %	All	Retail Store
<input type="checkbox"/>		105	Nordic Natural November	Active	0.00	Price -	10 %	All	Standard
<input type="checkbox"/>		103	Employee Discount	Active	0.00	Cost +	20 %	All	Employee
<input type="checkbox"/>		93	Loyalty Everyday Discount	Active	0.00	Price -	15 %	All	Loyalty
<input type="checkbox"/>		92	Senior Discount	Active	0.00	Price -	10 %	All	Senior

Showing 1 to 7 of 7 entries

7. To remove categories from an included or excluded list, highlight the category you wish to remove and press the red x next to the corresponding category.



8. If you want to make your discount rule inactive for the time being, click on the pencil icon next to the rule you wish to deactivate and uncheck the box that says “Is Rule

Active?” Press “Save Changes” at the bottom of the screen, and the rule will disappear from the “Active Rules” list.

Discount Rule - Edit

Discount Details

Is Rule Active?

Rule name

Senior Discount

Discount Formula

Regular Price - 10

9. To see a list of all of your currently inactive rules, press the “Status” dropdown menu and select “Show All”. You’ll be able to edit all inactive rules under this view and reactive them as you need to, by checking the same box we unchecked in the previous step.

Discount Rules

Remove Selected Status

Only Active

Show All

Rule ID Rule Name

YOU'RE DONE!

If you have any questions or concerns regarding this tutorial, or any other inquiries, please feel free to contact us at:

Email: support@orderdog.com

Call: 1-866-673-3736

Our hours: 8 AM – 6 PM CST

Monday – Friday

After Hours Support Available

Visit our website for more tutorials and resources:

<https://orderdog-inc.kayako.com/>

