

# MANAGING PROMO CODES

The details outlined below will show you how to enable, create, and manage promotional coupon codes within your CaterTrax site.

## GET STARTED

To start, visit your CaterTrax website.

1. Click **Admin Sign In** in the bottom right corner of the homepage. (Figure 1)
2. Complete all required fields on the **Administrative Sign In** page and click Sign In.

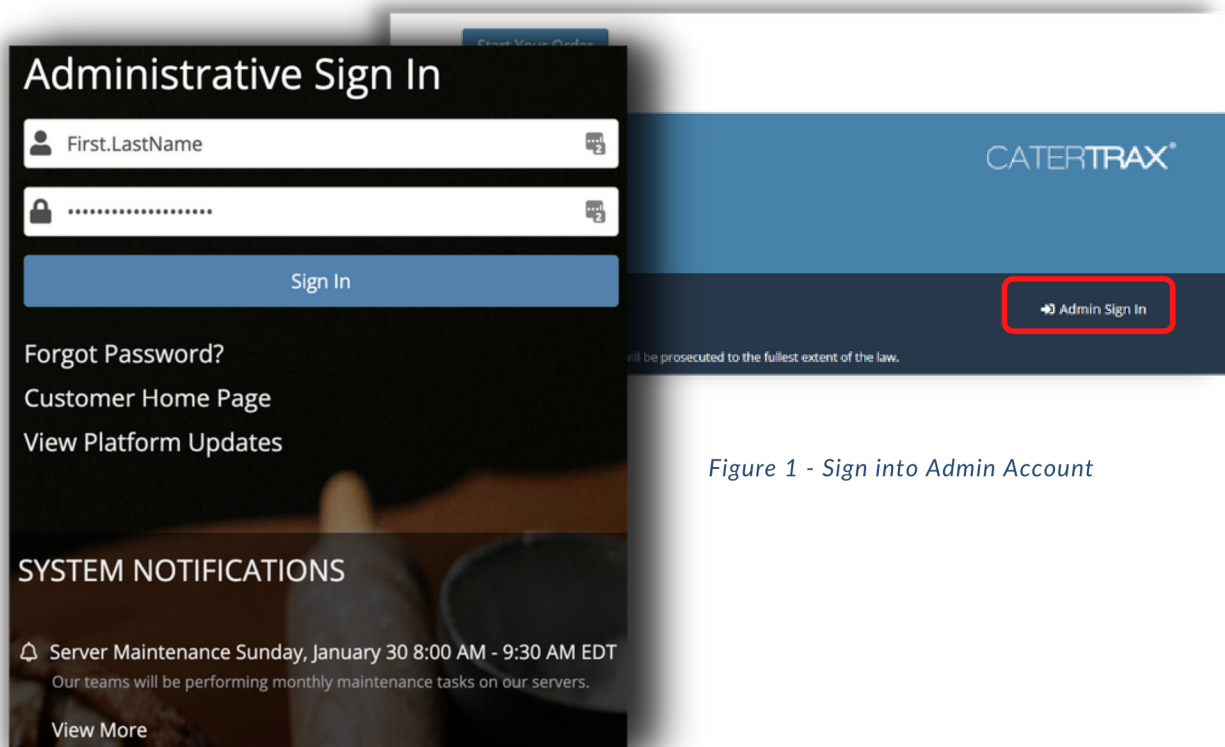


Figure 1 - Sign into Admin Account

# MANAGING PROMO CODES

## ENABLING PROMO CODES

1. Ensure you are signed into the CaterTrax site as an administrator and navigate to the **Support** icon. (Figure 1)
2. Select **Support Requests**, followed by the **Website Content Adjustment** category. (Figure 2)

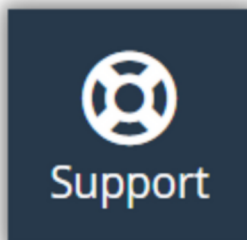


Figure 1 -  
Support Icon

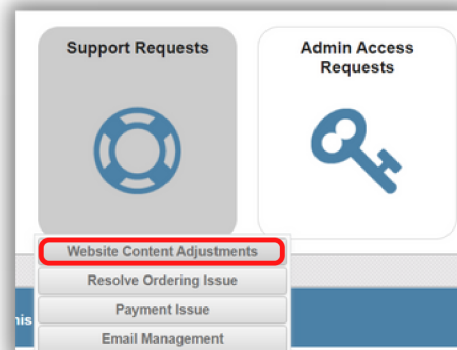


Figure 2 - Website Content  
Adjustment Request

## ENABLING PROMO CODES REQUIREMENTS

The Support Team will require specific information to begin enabling promotional coupon codes on your site.

- **Homepage Verbiage**
  - If necessary, provide any promotional messaging to present on your site's homepage.
- **Minimum Dollar Amount**
  - Provide the minimum dollar amount required to utilize the promo code, if there is no minimum, enter \$0.
- **Tax Calculation**
  - Determine and advise if the tax will be calculated to the order prior to or after the coupon is applied to an order. (Ex. Tax is applied to the \$10 total, or the \$5 remaining after a 50%OFF coupon is used.

## MANAGING PROMO CODES

Promotional coupon codes can be created by either submitting a support ticket or from within your CaterTrax site should you have the ability.

### REQUESTING PROMO CODE CREATION

Similar to how you would submit a **Support Ticket** (Figure 1) to enable promo codes, you will create and submit a new ticket with the same **Website Content Adjustment** (Figure 2) category to request a code to be created by our **Support Team**.

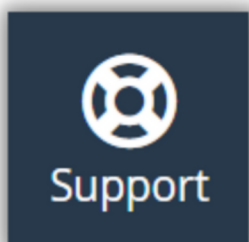


Figure 1 -  
Support Icon

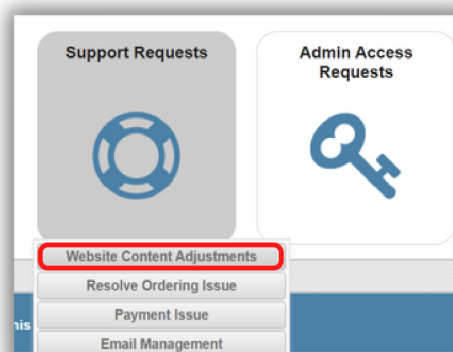


Figure 2 - Website Content  
Adjustment Request

### CREATING PROMO CODES REQUIREMENTS

The Support Team will require specific information to begin creating the promotional coupon codes on your site.

- **Promo Code Name**
  - The name will act as the code entered by customers to redeem the discount. (Ex. **Reward10** - Provides 10% off)
- **Promo Code Value Type**
  - Determine and provide whether the discount will provide a flat dollar amount or percentage off of an order.
- **Promo Code Value**
  - Determine and provide the actual value for the code. (Ex. \$10 off, or 10% off, etc)
- **Time Frame**
  - Determine and provide, if any, a date range that will restrict usage of the promo code within the defined time frame.

# MANAGING PROMO CODES

## CREATING PROMO CODES REQUIREMENTS CONTINUED

The CaterTrax platform provides additional optional details that can be applied when creating promo codes.

- **Limited Uses**
  - Codes can be limited to allow only a specific number of times a code can be used to redeem the discount. By default, it can be redeemed for an unlimited amount. (Ex. If set to 100, the 101st attempt will not apply the discount)
- **Limited Uses Per Customer**
  - A limit to each customer can be placed to restrict them from using it multiple times or allow them to use it as many times as they'd like. If no limit is provided the code can only be used one time per customer.
- **Specific Products or Categories**
  - Codes can be created and only redeemable for specific products or categories, such as Breakfast. By default, the code can be used for any item within the menu.
- **Specific Customers**
  - If there is a code needed to only be redeemable by specific customers on your site you can provide the customer(s) information. By default, the created code can be used by all customers.
- **First Time Order**
  - For codes that are only to be used for the first order made by a customer, please advise, if not, the code can be used on any order by default.

The screenshot displays the 'New ticket' form in the CaterTrax system. The form is divided into two main sections. The left section, highlighted with a red border, contains the ticket details: 'Ticket Category' is set to 'Website Content Adjustments', 'Subject' is 'New Promo Code', and the 'Description of Ticket' includes the promo code name '25OFF', a value type of 'Percentage %', a value of '25%', and a time frame of 'June 1st - August 31st'. The right section contains customer information: 'Your Name\*' is 'John Doe', 'Your Email\*' is 'John.Doe@caterer.com', 'Your Phone #' is '595-323-7849', 'Best time to reach you\*' is 'Early Morning (7am-9am)', and 'Order/Invoice #s, separated by commas: (if applicable):' is empty. At the bottom left, there is an 'attach a file...' link and a note about 'File types accepted'.

Figure 3 - Creating Promo Code Support Ticket Example

## MANAGING PROMO CODES

Once the Promo Code feature has been enabled on your site, you can also request access to create your own promo codes rather than needing to submit a ticket each time.

### CREATING YOUR OWN PROMO CODE

1. Once you are signed into your site as an Administrator, navigate and select the **Config** icon. (Figure 4)
2. On the menu displayed on the left-hand side select **Manage DB Tables**, then select **Coupons**. (Figure 5)
3. Once on the Coupons page, you can begin creating a code by clicking **Add a Record**. (Figure 6)

*Note: The Promo Code feature will be displayed on the administrative side of your CaterTrax side as Coupons.*

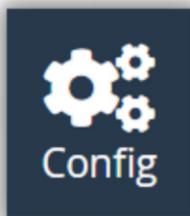


Figure 4 -  
Config Icon

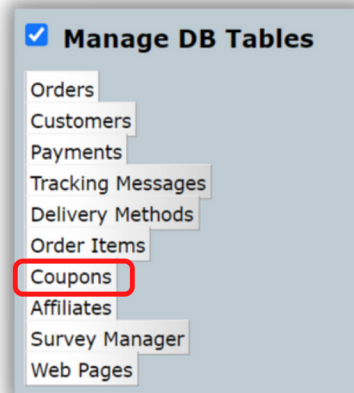


Figure 5 - Manage DB  
Tables > Coupons

Table name : coupons

Sort: Select (dropdown), Ascending (dropdown)

Select: Select (dropdown), Show Expired:

Display Search: All, couponId, couponname, couponamount, couponpercent (list)

Buttons: Add a Record (highlighted), Reset Form, Display Search

Figure 6 - Adding a Promo Code

# MANAGING PROMO CODES

## CREATING YOUR OWN PROMO CODE CONTINUED

4. Complete the **Add New Coupon** record by filling out the display fields. Remember every promo code requires at the minimum; a **Coupon Name**, the **Coupon Value Type**, and the **Coupon Value**. (Figure 7)

5. Once all the necessary fields have been entered, click **Add a Record** to complete the process. (Figure 7)

**Add New Coupon**

Coupon Name	<input type="text"/>
Coupon Text (Max 100)	<input type="text"/>
Coupon Value Type	<input checked="" type="radio"/> Cash <input type="radio"/> Percentage
Coupon Value	<input type="text"/> (Enter percentage in decimal form. Example: .50 = 50% off.)
Coupon Start Date	<input type="text"/>
Coupon End Date	<input type="text"/>
Affiliate Restriction	<input type="text"/> (Limit the products and categories selected by affiliate - leave blank for no restriction.)
Coupon Limit	<input type="text"/> (Limit the number of times this coupon can be used in total - leave blank for unlimited.)
Customer Use Limit	<input type="text"/> (Number of times each customer can use - leave blank for unlimited.)
First Time Order	<input type="checkbox"/> (When checked, coupon can only be applied to a customer's first order.)
Used By	
Expiration	

**Product Names** - Limit the Products for this coupon.  
 **Category Names** - Limit the Categories for this coupon.  
 **Quantity Product Feature Names** - Limit the Quantity Product Features for this coupon.  
 **Customer Names** - Limit the Customers for this coupon.

Figure 7 - Adding a Promo Code Record

# MANAGING PROMO CODES

## MODIFYING PROMO CODES

1. After selecting **Coupons** (Figure 5) you will see a list of any existing promo codes along with the ability to create a new one. To edit any existing promo codes you can click on the **Edit Pencil** icon displayed next to each code. (Figure 8)

2. Once all necessary edits have been made, click **Update Record**. (Figure 9)

*Note: If desired, you can add an image to your promo code. It cannot be added during initial creation, though after it has been saved, it will be displayed at the bottom of the record form labeled as **Upload Coupon Image**. (Figure 10)*



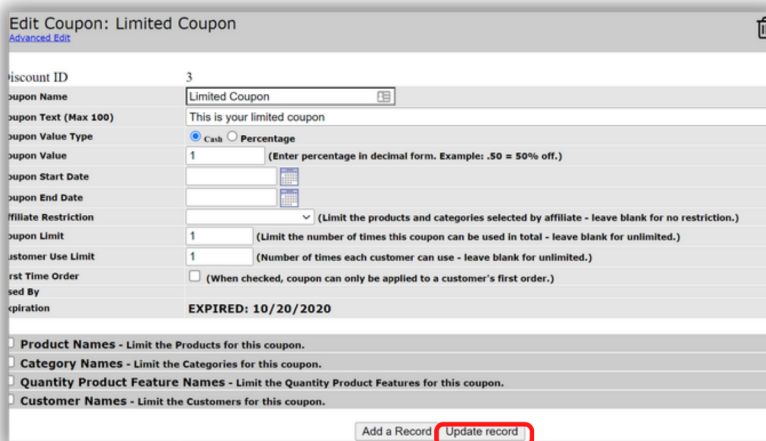
	3	Limited Coupon	1		10/1/2020	10/20/2020	1
	12	Reward10	3				

Figure 8 - Modifying Existing Promo Codes



Discount ID: 3  
 Coupon Name: Limited Coupon  
 Coupon Text (Max 100): This is your limited coupon  
 Coupon Value Type:  Cash  Percentage  
 Coupon Value: 1 (Enter percentage in decimal form. Example: .50 = 50% off.)  
 Coupon Start Date:   
 Coupon End Date:   
 Affiliate Restriction:  (Limit the products and categories selected by affiliate - leave blank for no restriction.)  
 Coupon Limit: 1 (Limit the number of times this coupon can be used in total - leave blank for unlimited.)  
 Customer Use Limit: 1 (Number of times each customer can use - leave blank for unlimited.)  
 First Time Order:  (When checked, coupon can only be applied to a customer's first order.)  
 Expiration: EXPIRED: 10/20/2020

Product Names - Limit the Products for this coupon.  
 Category Names - Limit the Categories for this coupon.  
 Quantity Product Feature Names - Limit the Quantity Product Features for this coupon.  
 Customer Names - Limit the Customers for this coupon.

Add a Record **Update record**

Figure 9 - Update Promo Code Record

**Upload Coupon Image**

**Note:** Uploaded image must be less than 200 kb. Supported file types are .jpg, .gif, .png, and .bmp.

File Name  Choose File No file chosen

Figure 10 - Coupon Image Upload

# MANAGING PROMO CODES

## REDEEMING A PROMO CODE - CUSTOMER GUIDE

1. After products have been selected and added to the cart, a link displayed in the **pop-out cart** will appear labeled, **Apply Promo Code**. (Figure 11)
2. Promo Codes can also be entered during step 1 of the checkout process. (Figure 12)
3. Step 3 of the checkout process will display the discount once the promo code has been applied. (Figure 13)

*Note: Only one promo code can be applied per order.*

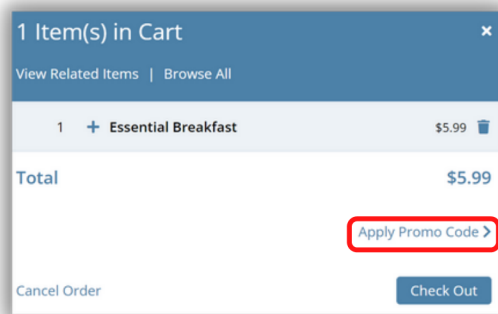


Figure 11 - Pop-Out Apply Promo Code

Quantity	Unit Price	Balance
10	\$5.99	\$59.90
Product Cost:		\$59.90
Coupon Discount (Reward10)		-\$5.99
<b>Balance:</b>		<b>\$53.91</b>

Figure 13 - Checkout Step 3 Discount

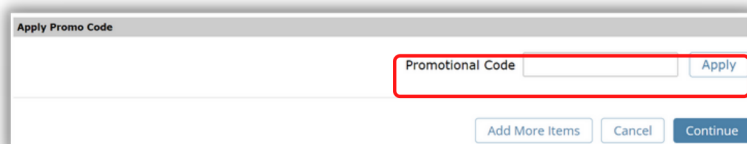


Figure 12 - Checkout Step 1 Apply Promo Code

## QUESTIONS?



Contact Support by filling out a support ticket.