E-Commerce Voucher Set User Guide

E-Commerce Voucher Set Actions

Add E-Commerce Voucher Set

To start this action, click the   Add E-Commerce Voucher Set   button above the E-Commerce Voucher Set listing.

Creates a new E-Commerce Voucher Set.

When this action starts a form is displayed to enter the details of the E-Commerce Voucher Set.

Each field customises or controls some aspect of the E-Commerce Voucher Set display or behaviour.

Some fields are required and must be entered before the E-Commerce Voucher Set can be added, the required fields are Code Prefix, Voucher Value.

Although some fields are not required, it is best practice to populate these, including .

Most fields are optional, and are often prefilled with a good default so these may not need to be changed. These optional fields allow further customisation.

Alongside most fields is a small ? icon with further help for each field. This information is included at the end of this document.

View

To start this action, select the E-Commerce Voucher Set you need to work on, and click the 🔍 View button in the ⋮ More Menu on that row.

Display the selected E-Commerce Voucher Set.

This action displays the E-Commerce Voucher Set similarly as for an Edit Action, except none of the fields are editable.

Useful for reviewing records without making any changes.

Edit

To start this action, select the E-Commerce Voucher Set you need to work on, and click the ✏ button on that row.

Edits an existing E-Commerce Voucher Set.

When this action starts a form is displayed with the existing E-Commerce Voucher Set and any previous information entered.

Each field customises or controls some aspect of the E-Commerce Voucher Set display or behaviour.

When editing it is advisable to only change what is needed and most fields may not need to be changed. These other fields allow further customisation.

Alongside most fields is a small ? icon with further help for each field. This information is included at the end of this document.

Copy

To start this action, select the E-Commerce Voucher Set you need to work on, and click the ⧉ Copy button in the ⋮ More Menu on that row.

Copies an existing E-Commerce Voucher Set.

The selected E-Commerce Voucher Set is copied and the word (Copy) will be added to the name of the new Copy

Search

To start this action, click the 🔍 button above the E-Commerce Voucher Set listing.

Allows a Search of E-Commerce Voucher Sets.

This allows a simple text search across all E-Commerce Voucher Sets.

To search a specific field select the field from the drop down list

Adv. Search

To start this action, click the 🔍 Adv. Search button above the E-Commerce Voucher Set listing in the ⋮ More Menu.

Allows an Advanced Search of E-Commerce Voucher Sets.

The Advanced Search opens a new section at the bottom of the E-Commerce Voucher Sets and allows several distinct features:

- Multiple Search Lines : allows E-Commerce Voucher Set matches to be identified where more than one search criteria is required

- Nested Searches : allows a combination of AND and OR logic to find results

- Saved Filters : allows a search to be saved as a Filter

- Export : allows the results of the search to be exported and worked on separately

Refresh

To start this action, click the ↻ Refresh button above the E-Commerce Voucher Set listing in the ⋮ More Menu.

Refresh the list of E-Commerce Voucher Sets.

Allows the list of records to be refreshed.

Although the records in the system will automatically update if a another Admin is using the system at the same time, the Refresh button allows the list to be manually updated.

Export to List

To start this action, click the ☁ Export to List button above the E-Commerce Voucher Set listing in the ⋮ More Menu.

Export the E-Commerce Voucher Set results shown to a List.

An Export List can be downloaded as a CSV file, or through any number of customised Export Templates.

Export to List will begin the process of Exporting the E-Commerce Voucher Sets shown.

Once the data is exported it is available to download as a CSV file with all columns.

A list of Export Templates for E-Commerce Voucher Sets will be shown, select the Export Template to Print, Export to Document, Export to CSV or Email.

Before using a template an opportunity to amend the template is provided.

See Export Templates for more information on Managing Export Templates.

Export All

To start this action, click the ⤓ Export All button above the E-Commerce Voucher Set listing in the ⋮ More Menu.

Export all the E-Commerce Voucher Sets to a List.

Exactly as for "Export to List" except rather than just Exporting the E-Commerce Voucher Set results shown, all E-Commerce Voucher Sets will be expored.

Export Item

To start this action, select the E-Commerce Voucher Set you need to work on, and click the ☁ Export Item button in the ⋮ More Menu on that row.

Export only the selected E-Commerce Voucher Set to a List.

Exactly as for "Export to List" except rather than just Exporting the E-Commerce Voucher Set results shown, only the selected E-Commerce Voucher Set is exported.

Choose Columns

To start this action, click the ⚙ Choose Columns button above the E-Commerce Voucher Set listing in the ⋮ More Menu.

Changes the Columns shown in the E-Commerce Voucher Set Listing.

The Choose Columns screen shows the Selected Columns on the left, and the E-Commerce Voucher Set Columns available on the right.

Drag and Drop column names between the two columns.

Alternatively double click on a column name to move it from one list to the other.

On the left the Selected Columns can be dragged up and down to change the ordering in the E-Commerce Voucher Set Listing.

Manage Filters

To start this action, click the ▽ Manage Filters button above the E-Commerce Voucher Set listing in the ⋮ More Menu.

Creates custom Filters for E-Commerce Voucher Sets.

A Filter is a saved Advanced Search. Multiple Filters can be created for E-Commerce Voucher Sets.

These Filters appear at the top of the E-Commerce Voucher Set listing.

When the Filter is selected the results are restricted to only include those which match the Filter.

The Manage Filters action shows a list of existing Filters for E-Commerce Voucher Sets where these can be managed.

E-Commerce Voucher Set Field Reference

Voucher Activated

If set, customers can use this voucher set

Code Prefix

This field is mandatory.

The unique three alphanumeric character prefix to every voucher of this type.

The first Voucher Code is formed by attaching the Base Value to the Code Prefix,

each subsequent voucher code value will be formed by adding the Multiplier each time.

Example:

> Code Prefix: VOU
>
> Base Value: 100000
>
> Multiplier: 13

the first four Voucher Codes will be:

> VOU100000 (Code Prefix 'VOU' followed by the Base Value '100000')
>
> VOU100013 (Code Prefix 'VOU' followed by the Base Value '100000' plus 13 x 1)
>
> VOU100026 (Code Prefix 'VOU' followed by the Base Value '100000' plus 13 x 2)
>
> VOU100039 (Code Prefix 'VOU' followed by the Base Value '100000' plus 13 x 3)Discount TypeSelect what type of discount the voucher allows

Voucher Value

This field is mandatory.

If the Discount Type is 'Value' this will be interpreted as a monetary amount,

If the Discount Type is 'Percentage' this will be interpreted as a percentage

Minimum Amount

The minimum total item value of the order before the voucher can be used

Note: If the Discount Type is 'Value', the Minimum Amount must be equal or

greater than the Voucher Value.

Single Use

Controls if this voucher may be re-used

Don't set if a voucher code may be used in more than one order

- No : this voucher can be used multiple times by anyone, useful for magazine vouchers

- Single Use : this voucher may only be used once, once used nobody else can use the voucher

- Account Single Use : this voucher may only be used once per User Account, useful for restricting a magazine voucher to one use per reader

Note: Account Single Use checking can be skipped if the User creates a new account, so it adds some extra protection but is not unbreakable.

Global

When checked this voucher applies to the entire order.

When unchecked, this voucher must be selected at the category or product level and will then only apply to those products. So in an order containing Products A, B and C, where product A and B use this voucher, the discount will only be applied to the line prices of product A and B.

Item Based

When checked and using 'Value' discount, the value discount is applied to each applicable item is the order.

This allows a voucher to apply to multiple items, so a £5 off applies ten times if ten applicable products are bought.

When unchecked, the voucher will only apply once to the order.

Quantity Maximum

Maximum line quantity this voucher may apply to, only applies to non Global vouchers

Quantity Minimum

Minimum line quantity this voucher may apply to, only applies to non Global vouchers