SHORTCUTS FUSION
PROMOTIONS
UNDERSTANDING PROMOTIONS
The Shortcuts promotions feature gives you the freedom to set up your own specials and other client benefits. You can create anything from a ‘buy 1 get 1 free’ promotion, to even the most detailed and complex promotions.

The promotions feature allows you to determine what makes a client eligible for a promotion, based on which items they purchase or how much they spend. You can also choose to apply the promotion to the entire sale or to specific products/services.

There are 3 main steps in the promotion setup process:

1. **Specify general promotion details:** What is the promotion? When is it available? Who is it available to? How many times can the promotion be used?

2. **Specify eligibility criteria:** What does the client need to buy (or how much do they need to spend) to become eligible for the promotion?

3. **Specify promotion benefits:** What benefits will the client receive when they participate in the promotion?

Promotions are created via a ‘promotions wizard’ which will guide you step by step through the process of setting up a promotion.
Click on the setup menu.

Scroll down and click on the promotions icon.

Any existing promotions will be displayed here.

Click new. The promotion setup screen will then appear.
4 Enter the name of the promotion into the promotion name field.

5 Optional: Enter a description.

6 If your clients will need to present a coupon for this promotion, tick the require coupon box and enter the coupon barcode into the barcode field.

7 If you want this promotion to be available to all your clients, select <general promotion> from the drop-down menu.

8 If you want this promotion to be exclusive to members of a club, choose related club, then select the relevant club from the drop-down menu.

9 If you want this promotion to be exclusive to members of a membership or loyalty program, choose related program, then select the relevant program from the drop-down menu.
If the promotion is club-specific, you can change the number of client points a client will earn for every $100 they spend. If you wish to change it, enter the number of points clients will earn per $100 spent. This will override the points value specified in the club setup screen.

If your promotion is linked to a club, clients will still receive their normal club discounts on top of the promotion.

If you want to make the promotion exclusive to new members of the club (i.e. a “welcome” promotion), enter the number of days after signing up that a new member will be eligible for the promotion. Skip this step if the promotion is not club-specific.

If you only want this promotion to be applied to a limited number of sales per site, enter the number into the maximum sale count field.
13. Select the valid dates and times from the drop-down menus. If you want the promotion to be available at all times, simply leave this section as is.

14. Tick the boxes in areas where you want employees to receive credit prior to the promotional discount.

15. Click next. The promotion eligibility screen will appear.
### SPECIFYING ELIGIBILITY CRITERIA

Select the type of eligibility this promotion is based on. This is the condition the client must meet in order to receive the promotion.

**Specific items in the sale:** The client will be eligible if they buy a specific number of certain items.

**Total spend of specific items in the sale:** The client will be eligible if they spend a certain amount on specific items.

**Total spend of the sale:** The client will be eligible if they spend a certain total amount.

**Purchased specific items over time:** The client will be eligible if they buy a specific number of certain items. These purchases need not be made at once, and can accumulate over time.

**Total spend on specific items over time:** The client will be eligible if they spend a certain amount on specific items. These purchases need not be made at once, and can accumulate over time.

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<thead>
<tr>
<th>Eligibility for this Promotion is Based On</th>
<th>Minimum Total Spend</th>
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<tbody>
<tr>
<td>Specific Items in the Sale</td>
<td>Promo Limit Per Sale</td>
</tr>
<tr>
<td><strong>Specific Items in the Sale</strong></td>
<td>No Limit</td>
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<tr>
<td>Total Spend of Specific Items in the Sale</td>
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<td>Total Spend on Specific Items over Time</td>
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*Click to add conditions*
You now need to select the products/services/sundry items that the client must purchase in order to be eligible for the promotion (if applicable). Double click on categories to view/hide the contents.

The numbers you enter in the **all** and **any** columns define how many of each item the client must purchase. You can use combinations of the **any** and **all** columns to create complex promotions.

If the client must purchase a specific combination of items (e.g. the client must purchase both a spray tan and a leg wax), enter the number of each item the client must purchase in the **all** column.

If the client must buy specific items, but they will be eligible as long as they buy any of these items (e.g. the client must purchase a spray tan, massage, or a leg wax), click inside the first **any** column next to each item and enter the amount the client must purchase.
You can apply the promotion to all/any items within a category by entering a value in the category row.

If you enter numbers into different any columns, then the client must purchase an item (or the specified number of items) from each column. This method can be useful for setting up a promotion where the client must purchase a number of items from various categories.

If your promotion is based on one of the ‘total spend’ options, enter the minimum amount the client must spend to be eligible for the promotion.

If you wish to restrict the number of times the promotion can be applied to a particular transaction, enter the limit in the promo limit per sale field. Promotions based on ‘total spend’ can only be applied once per transaction.

Click next. The promotion benefit screen will appear.
You now need to specify the benefits that are applied to a client’s transaction when they are eligible for the promotion. Select what the promotion benefit will be applied to from the drop-down list:

**Items purchased under this promotion:** The promotion’s benefit will apply to the same items purchased by the client that made them eligible for this promotion.

**The entire sale:** The promotion’s benefit will apply to the client’s entire transaction (total price).

**Specified items:** The promotion’s benefit will apply to certain items that you will specify on this screen.

If you chose the **specified items** option, continue to step 3. If you chose one of the other two options, skip to step 5.
If you only want clients to be able to receive an item of equal or lesser value than their original purchase, tick the limit to equal or lesser value than eligibility box.

If you want Shortcuts to notify you when a client is eligible for a promotion, tick alert when benefit is available.

Select the benefit that will be applied to the items from the benefit given drop-down list:

**Percentage reduction:**
Apply a discount percentage.

**Reduction by specified amount:**
Apply a fixed amount discount.

**Fixed price per item:**
Specify a fixed price for the discounted item(s).

**Cost price:**
Sell the discounted item(s) to the client at cost price.

**Gross margin % reduction:**
Apply a discount by a percentage of the gross profit margin. This option only applies to products.
6. If you chose **percentage reduction**, **reduction by specified amount**, or **gross margin % reduction** in step 5, enter the desired discount into this field.

7. If you chose **the entire sale** in step 1, skip to step 10. Otherwise, continue to step 8.

8. Enter a value of 1 or more in the **maximum** column for each item you want to include as a promotional benefit. This is the maximum quantity a client can purchase at the promotional price in one transaction.

9. If you selected **fixed price per item** in step 5, click to select the **price** field beside the relevant item(s) and enter the desired price.

C. If this promotion is linked to a club, you can award clients extra points for an item by entering a value in the **bonus points** field.

10. Click **done** to finish creating your promotion.