X-SpecialOffers add-on module

for X-Cart 4.1.11

User Manual

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X-SpecialOffers add-on module

for X-Cart 4.1.11

User Manual

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This User Manual is intended for X-SpecialOffers add-on module for X-Cart v. 4.1.11. It covers most of the areas of the add-on module's installation and use and is applicable for both X-Cart GOLD and X-Cart PRO versions.

X-SpecialOffers add-on module for X-Cart 4.1.11. User manual.

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1 General information

X-SpecialOffers is an X-Cart add-on module that allows you to create special offers. By special offers we mean a great variety of discounts and bonuses which customers can get under certain conditions.

X-SpecialOffers does not impose any ready-made schemes, but provides you extreme flexibility in defining bonuses/discounts and setting up conditions under which they will be made available to your customers.

1.1 Key features

- allows to create an unlimited number of special offers based on 5 combinable types of bonuses;
- allows to set up complex conditions defining when this or that special offer can be applied;
- informs customers about available special offers by means of promo blocks, 'Special offers' page and clickable 'Special offer' labels added to thumbnail images of products;
- detects situations in which a customer is eligible for getting discounts/bonuses;
- automatically applies bonuses to qualified orders (performs deduction of discounts and shipping charges; adds bonus points to customer accounts);
- provides optional bonuses (free products and memberships) to eligible customers;
- keeps the list of available offers up-to-date (automatically disables expired offers);
- provides customers with a means for managing earned bonuses (including a tool for converting bonus points to Gift Certificates).

X-SpecialOffers is a reliable up-to-date solution that can help your online business succeed in the competitive market of today.

More products of X-Cart family are available at http://www.x-cart.com/.

1.2 Special offers

Special offers which can be created by means of **X-SpecialOffers** add-on module are extremely diverse. Each offer is supposed to give a customer some kind of bonus: a discount, some bonus points, a privileged membership, free products or free shipping. Bonuses may be combined within one special offer (for example, a customer may be offered both a discount and a membership for buying a specific amount of some product).

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Customers become eligible for getting bonuses as a result of certain conditions being met. For example, you can create offers that will be applicable if a customer:

a) buys a certain product/combination of products/product(s) from a certain category;

b) belongs to a specific membership group;

c) has a certain amount of bonus points;

d) comes from a specific geographic location;

e) orders products for a sum of money that is larger than a certain amount.

Conditions can be combined with one another to form complex conditions.

It is possible to define a validity period for each of your special offers. Expired offers get disabled automatically.

Detailed information on how to create special offers is available in the chapter 'Creating and Configuring Special Offers'.

1.3 'Special offers' page

After you create and enable some special offers, the visitors of the Customer area of your store can obtain information about currently available special offers from a page titled 'Special offers'. This page can be accessed by clicking on Special offers in the Special menu.

Figure 1. Special menu -> Special offers.

The 'Special offers' page displays detailed offer descriptions which you create while configuring your special offers (Information on how to create detailed offer descriptions is available in the "Promo texts" section of the chapter "Creating and Configuring Special Offers". See: Detailed promo blocks).

Please note that the set of offers displayed on the 'Special offers' page may change depending on who is viewing the page. Special offers which may be used only by customers with a certain membership or customers from a specific geographic location are displayed on the 'Special offers' page only to customers logged into the store with a profile corresponding to that membership or geographic location.

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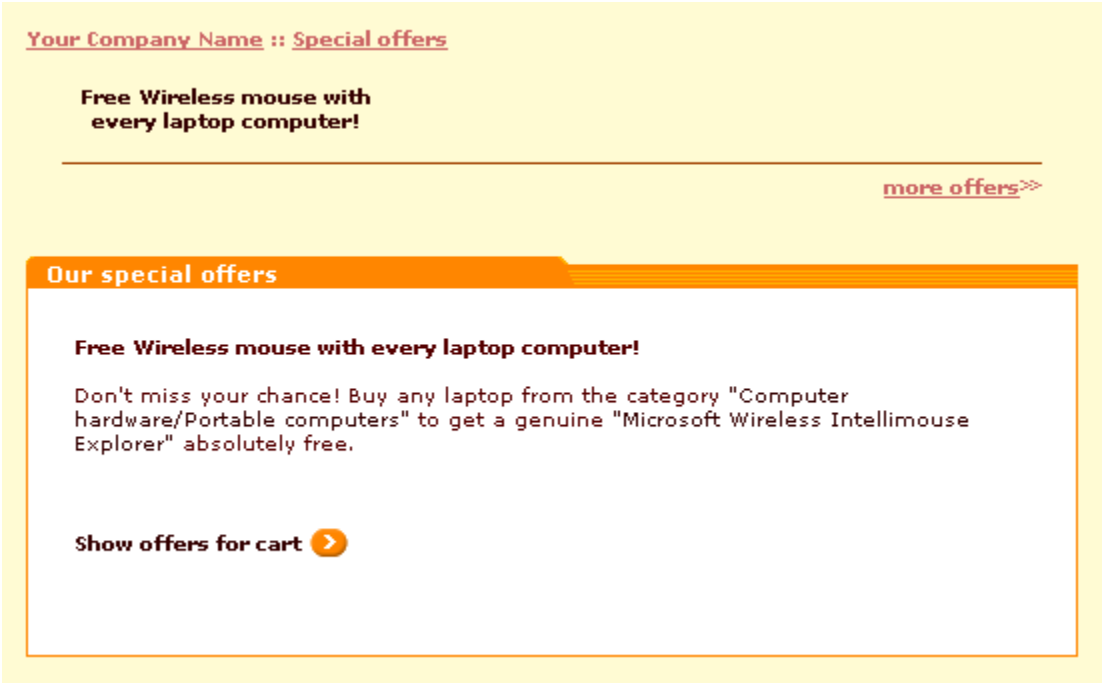

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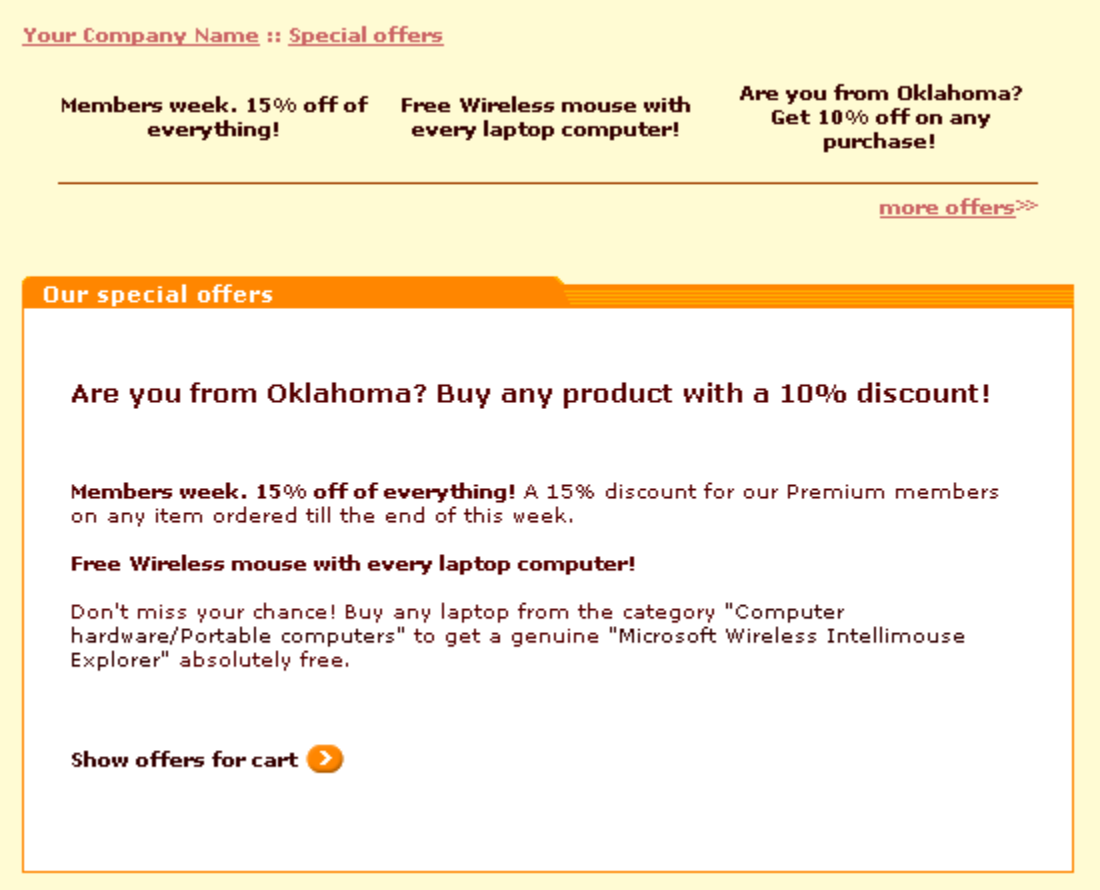

Figure 2. Example: the same 'Special offers' page as seen by a Premium member from Oklahoma (1) before login (2) after login.

1.4 Promo blocks and 'Special offer' labels

In addition to the 'Special offers' page, information about available special offers can be provided to customers via short promo blocks. A short promo block is a compact offer description which may appear at the top of store pages displaying text and/or graphics and providing a link to the detailed description of the corresponding offer. Short descriptions for use in promo blocks may be easily created in the process of configuring individual special offers (Information on how to create short offer descriptions is available in the "Promo texts" section of the chapter "Creating and Configuring Special Offers". See: Short promo blocks).

Short promo blocks concerning specific products or product categories appear at the top of product and category pages (on the pages of the product/category itself and the pages of their parent categories).

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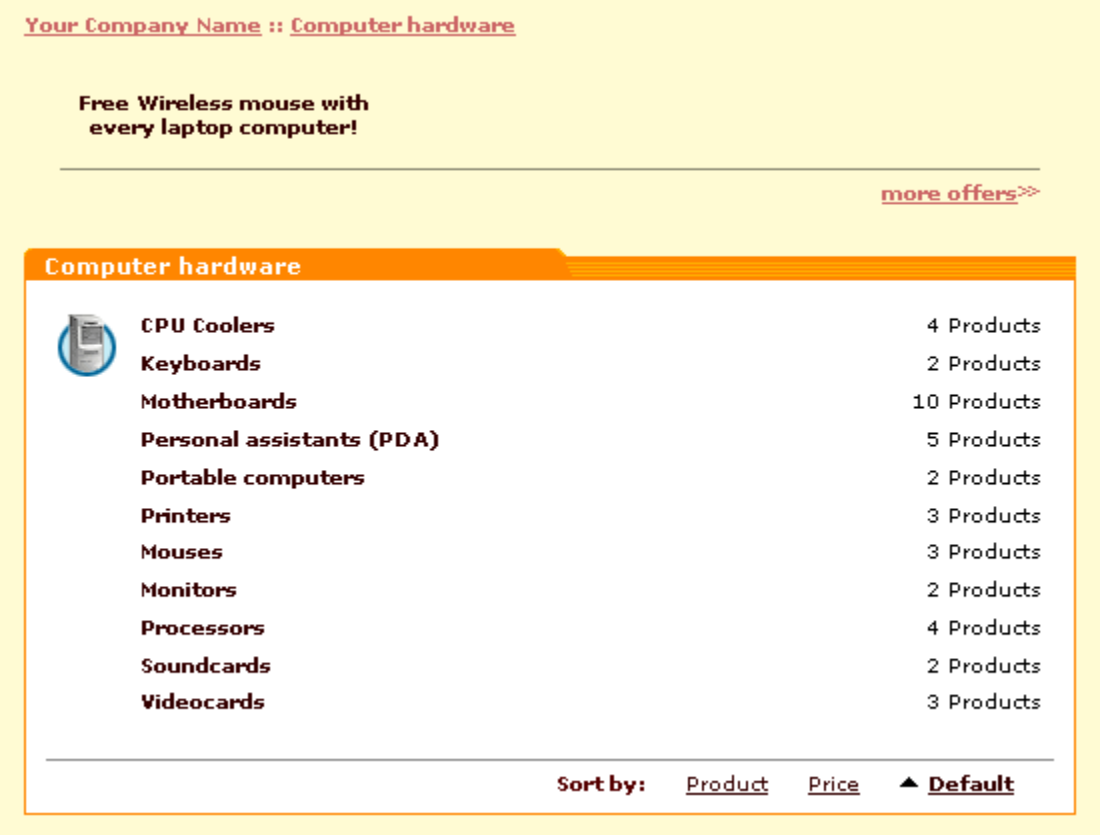

Figure 3. A short promo block displayed on 'Computer hardware' category page.

The number of short promo blocks that may be displayed simultaneously on one product/category page can be defined by setting the option Maximum number of offers in the list in General settings/Special Offers options.

You can adjust the module so that multiple short promo blocks appearing on one product/category page will be displayed in 1-3 columns. The number of columns can be defined by setting the option Display offers list in multiple columns (1-3) in General settings/Special Offers options.

More information on Special Offers options is available in the section "Configuring the module" of the chapter 'Installing and Configuring X-SpecialOffers'.

The link 'more offers >>' which may appear on category/product pages allows your customers to access a list of detailed descriptions of all the offers available for the category/product they are currently viewing. The link is especially helpful for situations in which the number of special offers available for a category/product exceeds the number of short promo blocks which can be displayed on one page.

Short promo blocks with information about special offers not concerning specific products/categories can appear on any store page (except for product/category pages already used for displaying promo blocks of

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offers concerning products/categories). The module shows only one such promo block per page based on random selection.

When a short promo block is made clickable, clicking on it allows a customer to view the detailed description of the offer.

Figure 4. A detailed offer description obtained by clicking on a short promo block.

The detailed offer description page provides some additional links:

- the link **Show all available offers** allows a customer to access the 'Special offers' page with detailed descriptions of all the offers currently available;
- the link **Show offers for cart** allows a customer who has products in his shopping cart to view descriptions of all the offers which can be or are already being applied to the contents of the cart;
- the link **Continue shopping** allows a customer to return to the category/product page from which he was redirected to the detailed offer description.

All the products affected by special offers receive labels saying there is a special offer available. Customers can click on these labels to find out more information about the offers.

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Figure 5. 'Special offer' labels mark products on which special offers are provided.

1.5 Cart and checkout

The shopping cart page allows a customer to see what bonuses will be applied to his order after checkout and to find out if there are any other bonuses that may be applied.

Discounts, bonus points and free shipping are applied to qualified orders automatically.

When a discount is applied to a product in a customer's shopping cart, the shopping cart page displays two prices for this product:

- **common price** – a price defined for this product by the product provider;
- **special price** – a discounted price made available to the customer according to the special offer that was applied.

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Figure 6. A shopping cart displaying common and special prices as a result of a discount being applied.

To order the product(s) at the special price, the customer simply needs to proceed to checkout: the discount amount will be subtracted from the order subtotal automatically.

When a customer's purchase allows him to get bonus points, the customer is informed about it by a special message displayed in the shopping cart: "After checkout you will get: *N* bonus points", where *N* is the number of bonus points.

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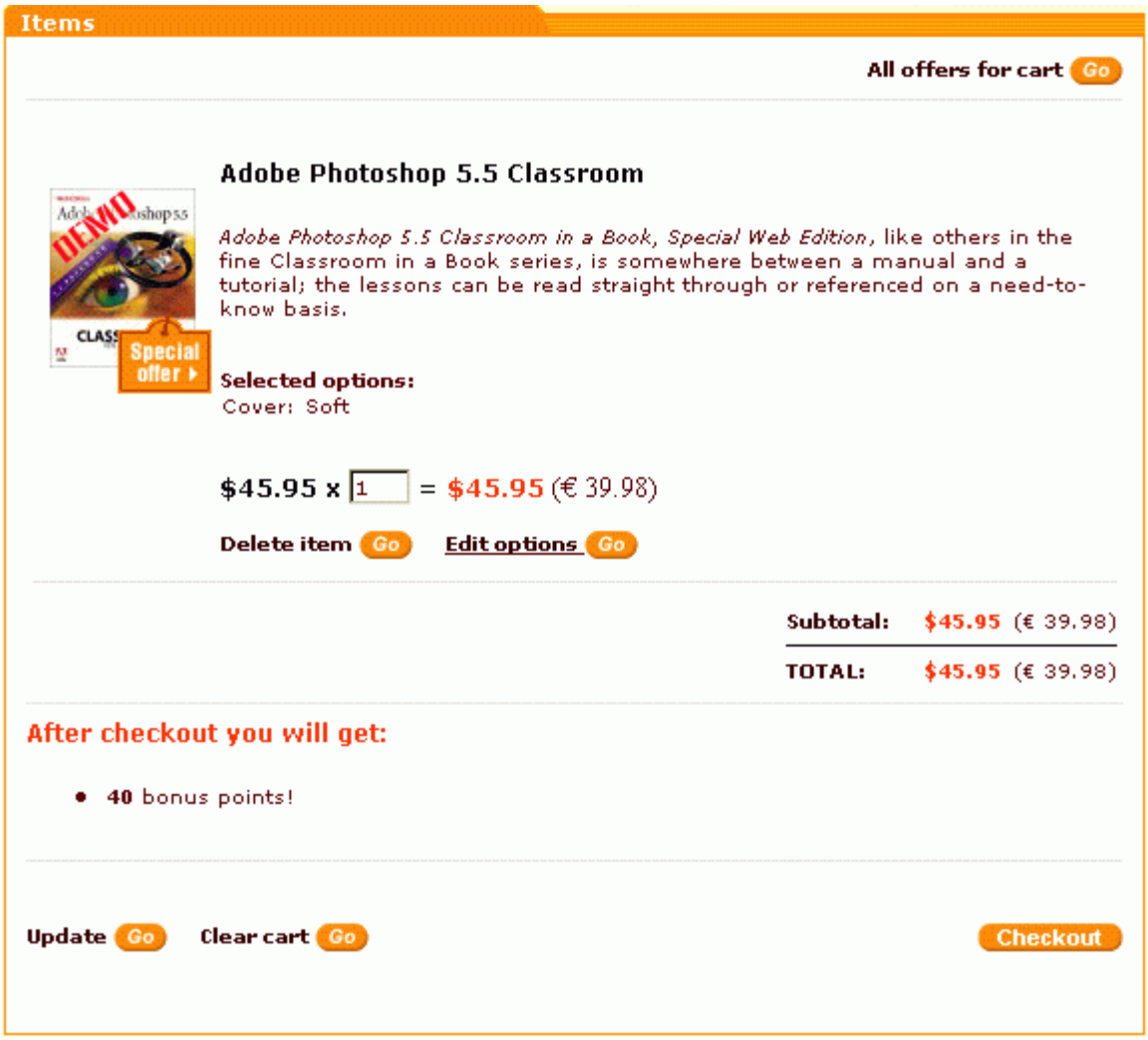

Figure 7. A shopping cart displaying a message about an opportunity to get bonus points.

The invoice provided at the end of checkout procedure shows the number of bonus points awarded for the purchase (‘Bonuses’ section):

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Figure 8. Invoice showing the number of awarded bonus points in the 'Bonuses' section.

As bonus points are awarded not immediately, but after order completion, you might want to inform your customers that they will need to allow enough time for the bonus points to reach their account.

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Customers can view the number of bonus points they have earned by clicking on **Bonuses** in Your cart menu.

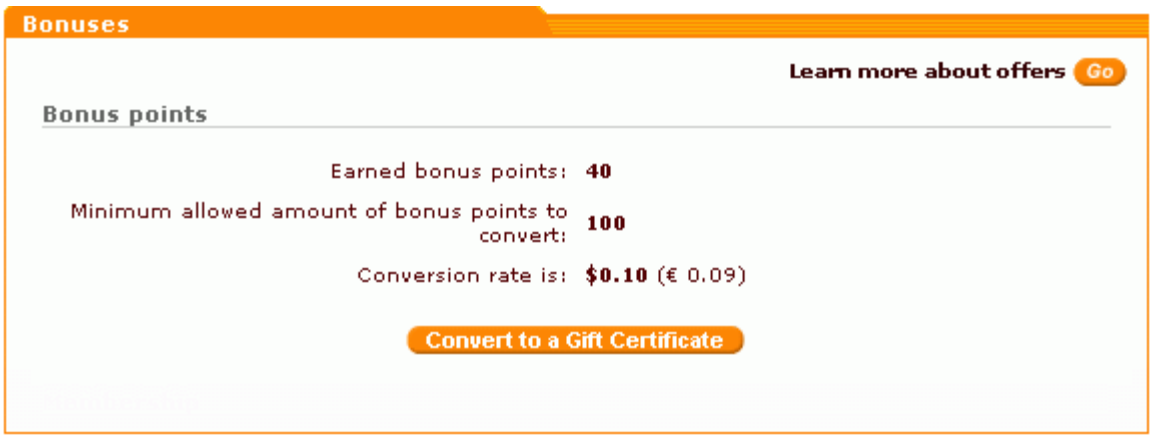

Figure 9. 'Bonuses' section showing the number of bonus points earned by a customer.

When a special offer applied to a customer's cart involves free shipping, the customer does not get any additional messages, but shipping charges are not applied. The invoice provided at the end of checkout procedure shows that the cost of shipping in this case is counted as 0.00.

If a purchase makes it possible for a customer to get a bonus membership, the customer is informed of the fact by a message displayed to him on the shopping cart page. The membership message appears in the same way as the message displayed when a customer gets bonus points:

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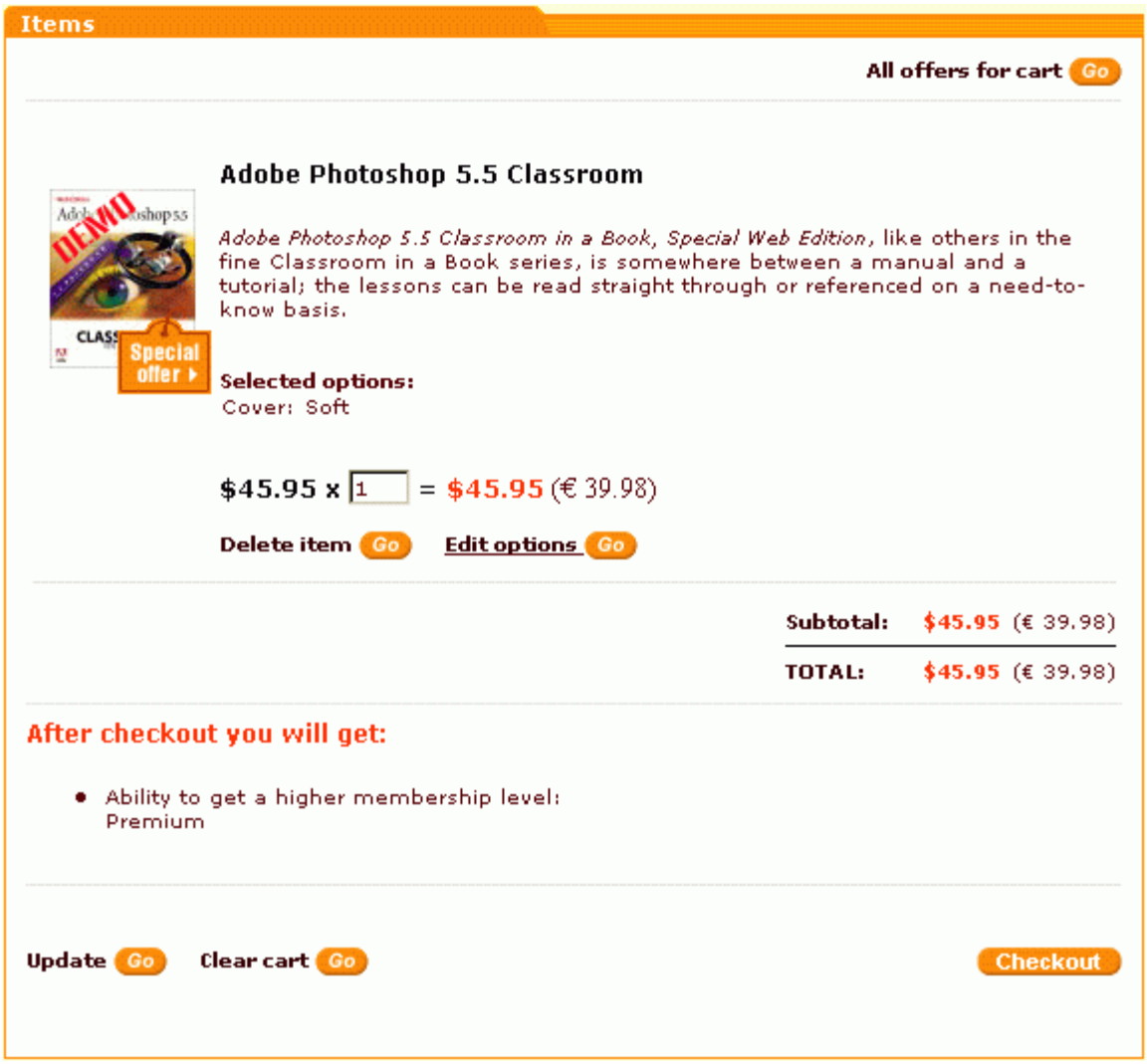

Figure 11. A shopping cart displaying a message about an opportunity to get a membership.

Similarly, the invoice issued at the end of checkout contains a record of the awarded bonus:

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Invoice

COMPANY NAME

INVOICE

Date: 04-07-2005 15:48:51
Order id: #10
Order status: Queued
Payment method:
Phone Ordering
Delivery method:
n/a

Your Company Name
Test address, Test city
50001, California
United States
US TOLL FREE: 1-800-555-5555
International: 500-555-5555
Fax: 1-800-555-5555

Company:
First Name: John
Last Name: Smith
Phone: n/a
Fax:
E-Mail: john_s@example.com
URL:

Billing Address

First Name: John
Last Name: Smith
Address: test
City: test
State: Oklahoma
Country: United States
Zip/Postal code: 12345

Shipping Address

First Name: John
Last Name: Smith
Address: test
City: test
State: Oklahoma
Country: United States
Zip/Postal code: 12345

Products ordered

SKU	Product	Item price	Quantity	Total
SKU63	Adobe Photoshop 5.5 Classroom **Options:** Cover: Soft	$45.95	1	$45.95

Subtotal: $45.95
Shipping cost: $0.00
Total: $45.95

Bonuses

Bonus memberships: Premium

Thank you for your purchase!

Print invoice Go

Continue shopping

Figure 12. Invoice showing the membership granted to a customer in the 'Bonuses' section.

The principal difference between getting bonus points and getting a bonus membership is that a

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membership will not be granted to a customer automatically. If a customer wants to get a membership offered to him, he needs to wait till his order status is set to *'completed'*, then visit the section '**Bonuses**' (*Your cart* menu -> *Bonuses*) and sign up for the desired membership.

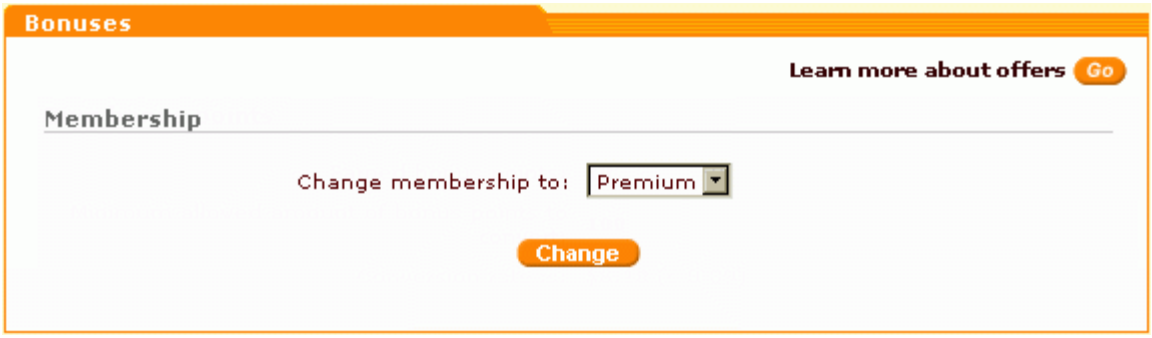

Figure 13. 'Bonuses' section allowing a customer to sign up for a granted membership.

If putting some products into the shopping cart entitles a customer to getting free products or some kind of discount on products which have not yet been placed into the cart, a button **Check for special offers** appears at the bottom of the 'Items' form.

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Figure 14. Cart displaying the button Check for special offers.

Clicking on this button allows the customer to view the list of products offered at special prices (including zero price on free products).

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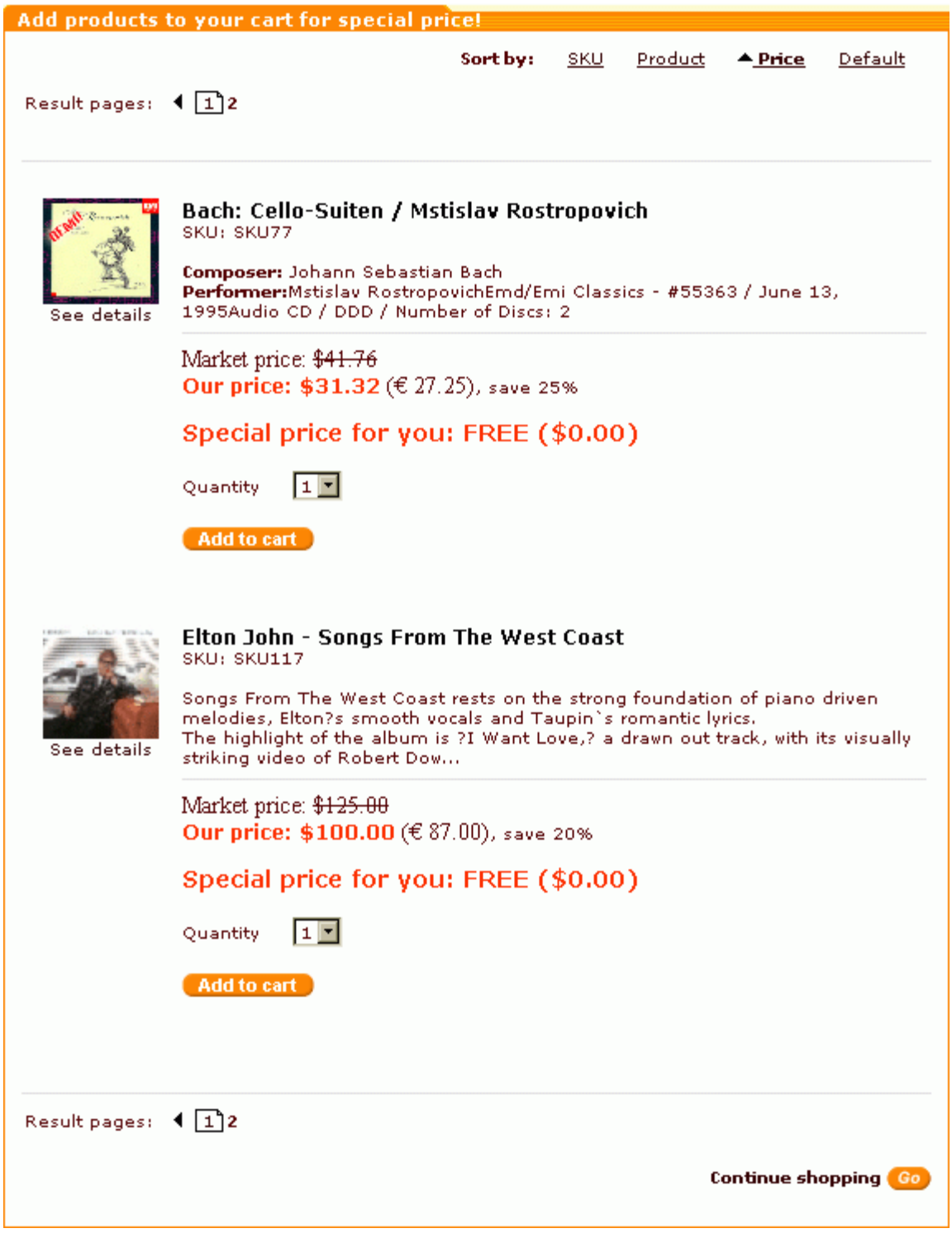

Figure 15. List of products which can be added to cart at special prices.

The customer can choose any product from the list and add it to the shopping cart.

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If a customer adds to his shopping cart some discounted products, both the regular and the special prices are shown for each of them. Free products are simply marked by a note “This item is FREE for you!”, their price appears as 0.00.

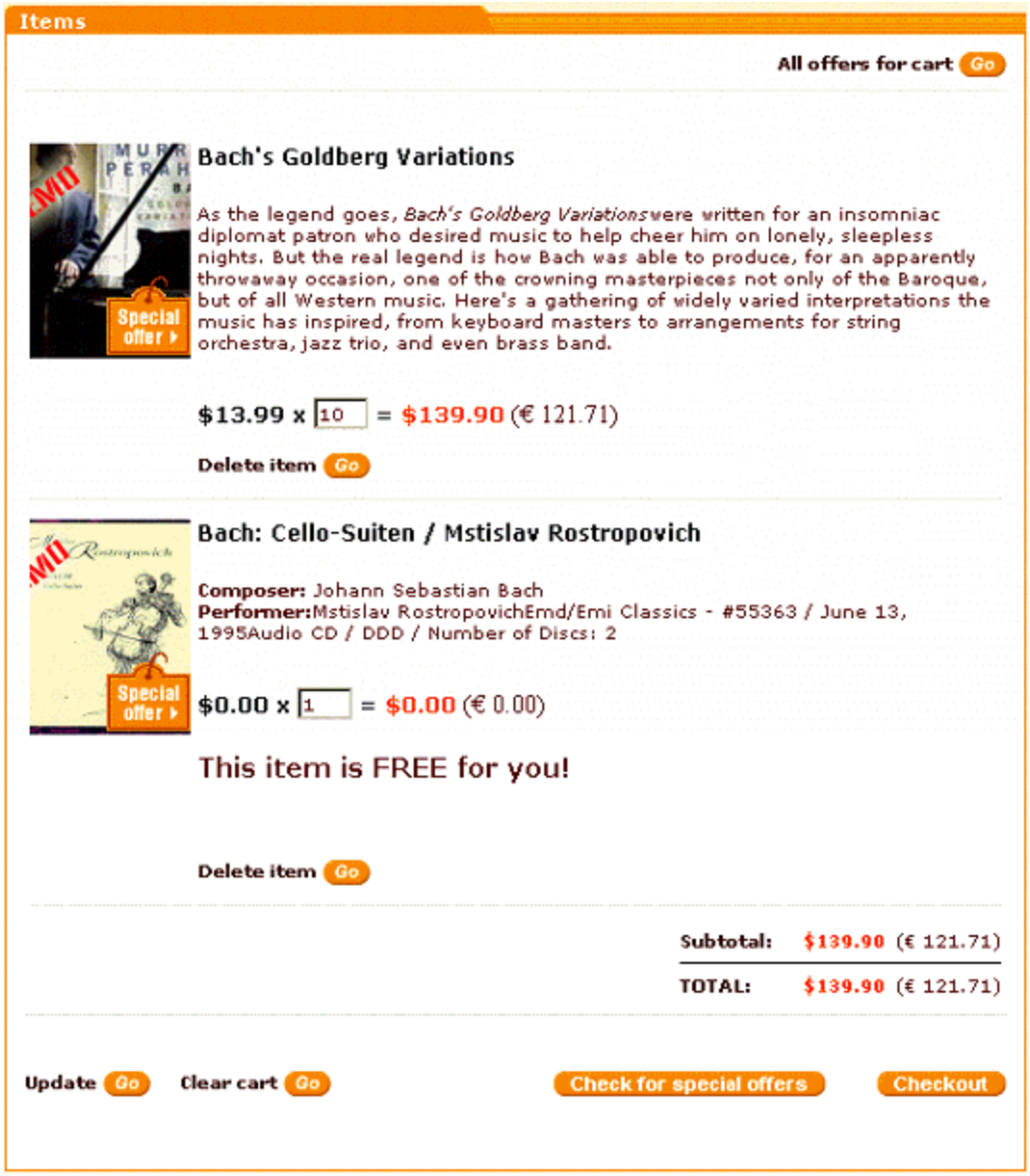

Figure 16. A shopping cart containing a free product.

Important! Please be aware that when a free product that gets added to a shopping cart comes from the same category as some of the products already contained in the shopping cart, the zero price is assigned to the most expensive of the category products added to the cart.

Example: Suppose, there is a special offer that allows anyone to order any 2 books and get a third book free (all the books are in the same category). If a customer adds to cart book A ($3) and book B ($5), and then selects some book C ($2) as a free gift to go with his purchase, X-SpecialOffers will readjust the prices of the products in the shopping cart so that the books A and C will cost $3 and $2

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respectively, while the book B will be offered at zero price.

The link **All offers for cart** located at the top of the 'Items' form on the shopping cart page provides access to descriptions of special offers available for the current state of the shopping cart. Customers can use this link to view the complete list of offers which can be applied or are already being applied to their cart.

Note. Only one discount may be applied to any item. If several discounts might apply to the same product, the greatest of the applicable discounts is used. For example, one discount offers 10% off on red T-shirts, and a different discount offers 20% off on any purchase to customers with "Premium" membership. When a "Premium" member adds a red T-shirt to his shopping cart, he can see both the discounts in the list of offers available for his cart; however, only the 20% discount for "Premium" members is applied to his purchase at checkout.

1.6 'Bonuses' section

Registered customers can access information about the bonuses they have earned via Your cart menu -> Bonuses.

Before a customer earns any bonuses, the 'Bonuses' section is empty. Then, as bonuses are collected, 'Bonus points' and/or 'Membership' subsections may be included.

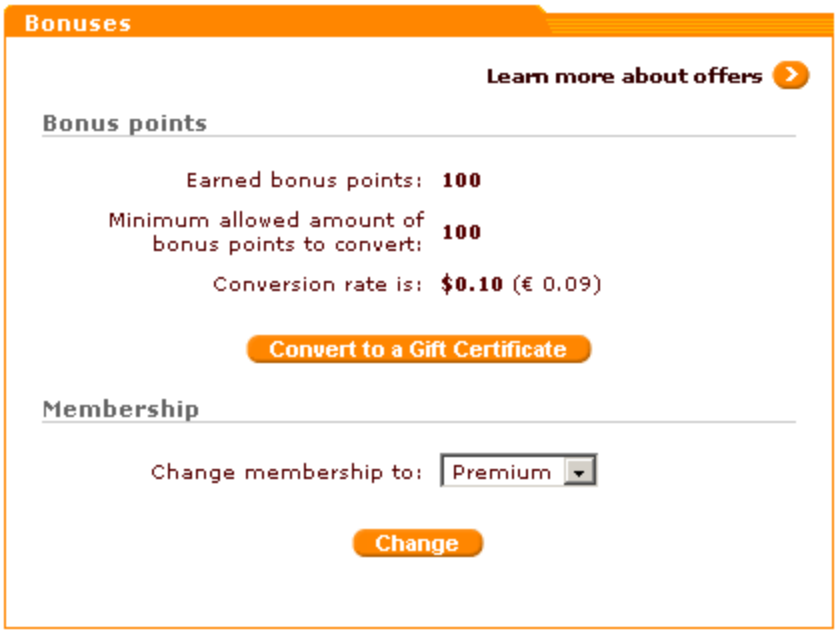

Figure 17. 'Bonuses' section of the Customer interface.

'Bonus points' subsection

'Bonus points' subsection allows a customer to find out how many bonus points he has and, if he wishes to,

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to convert bonus points to a Gift Certificate.

The line **Earned bonus points** in the 'Bonus points' subsection displays the number of bonus points earned by the customer.

The line **Minimum allowed amount of bonus points to convert** shows the minimum amount of bonus points which can be converted to a Gift Certificate. If the number of bonus points that a customer has equals or is larger than this amount, he can convert the bonus points to a Gift Certificate by clicking on the **Convert to a Gift Certificate** button.

The store administrator can set the minimum amount of bonus points which can be converted to a Gift Certificate and the conversion rate via the section General settings/Special Offers options (See: "Configuring the module"). He may also edit the number of bonus points earned by any customer by editing the customer's profile (See: "Managing bonus points").

'Membership' subsection

'Membership' subsection allows a customer to sign up for memberships granted to him as bonuses. Bonus memberships are automatically added to the list in the **Change membership to…** drop-down box. To sign up for a membership, the customer needs to select the desired membership from the drop-down box and click on **Change**. The chosen membership will be given to him automatically (no additional admin approval is needed).

1.7 Functional roles

The administrative part of X-SpecialOffers module is handled by the store administrators and providers.

In **X-Cart GOLD** the store admin/provider fully controls the work of the module: enables the module and adjusts the module settings; configures special offers (defines bonuses and conditions, creates promo-blocks, adjusts availability and duration for each offer); manages existing special offers; has access to information about the number of bonus points earned by specific customers and edits the number of bonus points if necessary.

In **X-Cart PRO** the store admin and provider(s) have different access privileges, so the functions performed by them in connection with X-SpecialOffers are not the same. The administrator installs and configures the module, while all the tasks related to configuring and managing special offers are performed by providers. The administrator also carries out the function of supervision, which enables him to edit the number of bonus points earned by the store users.

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1.8 Installing and configuring SpecialOffers

Learn to install and uninstall X-SpecialOffers:

- installing X-SpecialOffers
- uninstalling X-SpecialOffers

Find out how to configure X-SpecialOffers:

- configuring the module

1.8.1 Installing the module

The process of installing the module X-SpecialOffers is the same for X-Cart Gold and X-Cart Pro.

To install the module, take the following steps:

1. Download the module distributive from the *File area/Software distributives*. The file you need is named **x-offers-x.y.z.tgz**, where x, y and z are the numbers of the module version (must be the same as the version of your X-Cart).

2. Uncompress the archive file **x-offers-x.y.z.tgz** and copy the resulting files to the directory where your X-Cart is installed. The file INSTALL.X-OFFERS provides instructions for installing the module.

3. Run in the browser the installation script: **http://www.yourhost.com/xcart_dir/install-xoffers.php** X-SpecialOffers installation wizard will be launched.

4. Enter your authentication code, read the License Agreement and, if you accept the terms and conditions of the License Agreement, click the **Next** button.

   Note. The authentication code is issued on completion of X-Cart installation. It is used to prevent unauthorized re-installation of X-Cart. You also need to know this code to install any purchased X-Cart modules. If you do not remember your Auth code, you can look it up at any time in the file include/install.php.

5. The installation script will copy the files and make all the necessary changes in the database.

   Note. If, while running the installation, you get any messages marked red, it means some errors were encountered and the installation has not been completed properly. Resolve the issues causing the installation process to be interrupted and run the installation wizard from the beginning.

Click on **Next** to proceed.

6. After the installation is completed, you will get a message informing you of the completion of the installation process.

Now you need to enable the module and configure it for work with your X-Cart based store.

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1.8.2 Uninstalling the module

To uninstall X-SpecialOffers, do the following:

1. Launch the Installation Wizard (Point your browser at the location of your store with the addition of /install-xoffers.php)
2. At the first step of the Installation Wizard (**Step 1: License agreement**), select the 'Un-install the module' radio button.
3. Click the **Next** button.
4. The Installation Wizard will remove the module files and deactivate the module (**Step 2: Uninstalling the module**). Click **Next** to proceed.
5. **Step 3: Uninstallation complete** is the final step of the uninstallation process. It notifies you that the module has been successfully uninstalled.

Important: After uninstalling X-SpecialOffers, be sure to remove the module distribution package from your web directory.

1.8.3 Configuring the module

Log in to the Admin area. Go to the 'Modules' section.

Enable the module **Special Offers** by selecting the checkbox next to it.

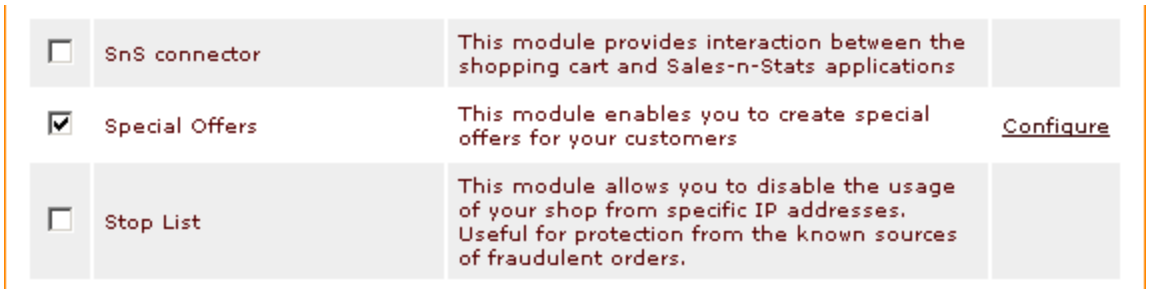

Figure 1. X-Cart admin area, 'Modules' section: enabling X-SpecialOffers.

Click on **Update** at the bottom of the page.

1. Go to the General settings/Special Offers options section and adjust the module settings:

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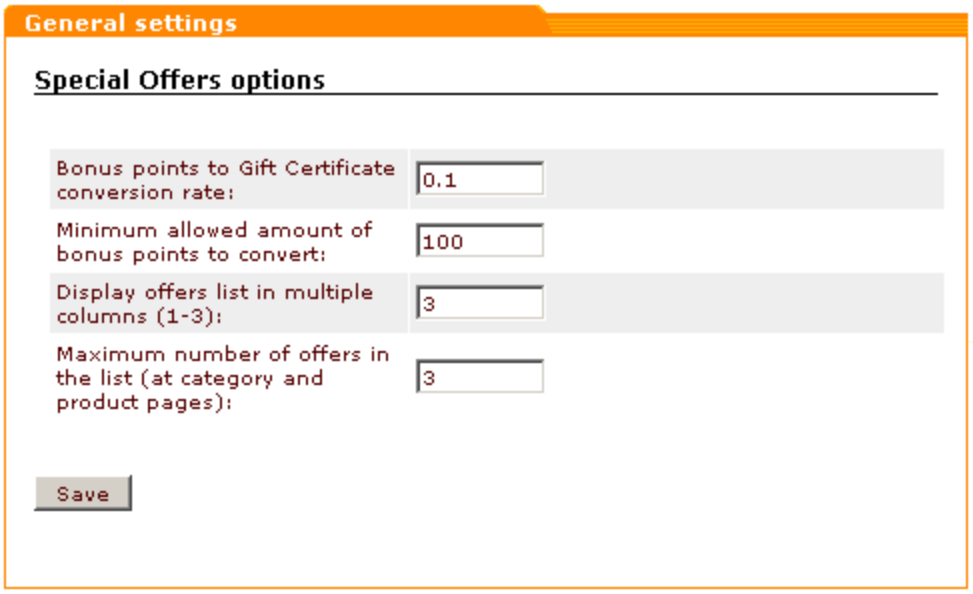

Figure 2. X-Cart admin area, 'General settings/Special Offers options' section.

- **Bonus points to Gift Certificate conversion rate:** Specify the conversion rate which should be used when converting bonus points to a Gift Certificate (The amount of the resulting GC will be calculated as the number of bonus points multiplied by the number entered into this field). For example, if the store currency is US dollars, the conversion rate is 0.1, and the customer has 100 bonus points, the GC amount will be $10 (100 bonus points x 0.1 = $10). Please note that bonus points will only be converted to a GC if their amount is larger or equal to the amount specified in the 'Minimum allowed amount of bonus points to convert'.

- **Minimum allowed amount of bonus points to convert:** Enter the minimum amount of bonus points which a customer can convert to a Gift Certificate.

- **Display offers list in multiple columns (1-3):** Specify how many columns you would like the short promo blocks of your special offers to be displayed in on the store pages.

- **Maximum quantity of offers in the list (at category and product pages):** Specify the maximum number of short promo blocks with information about special offers that will be simultaneously displayed to your customers on category and product pages.

Click on **Save** to apply the changes.

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2 Creating and configuring special offers

Special offers are configured via the section 'Special offers' located in the administrative (*X-Cart GOLD*) or provider (*X-Cart PRO*) zone of your store. To access this section, select Special offers from the Inventory menu.

Figure 1. Inventory menu -> Special offers.

The page you will find yourself at is supposed to provide a list of all the special offers in your store. As no special offers have been configured yet, on your first visit to this page the list of special offers will be empty.

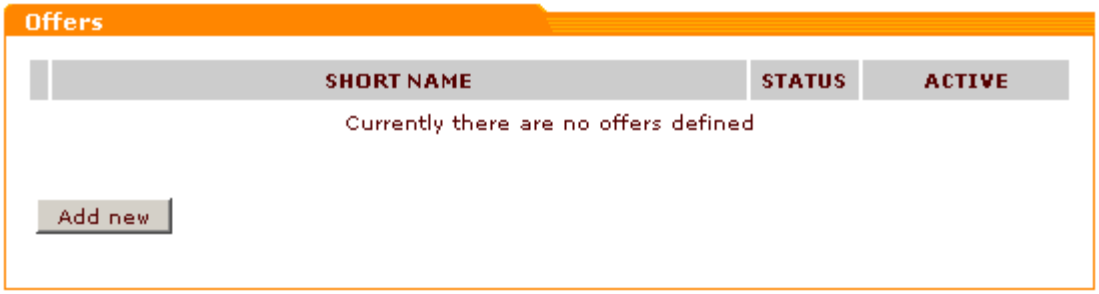

Figure 2. 'Special offers' section (no special offers configured).

As you start creating special offers, they will be added to the list.

To add a special offer, click on **Add new** at the bottom of the 'Offers' dialog. You will be given access to the offer configuration dialog. Use it to configure the new offer.

Configuring any special offer involves the following steps:

1. Setting up offer conditions;
2. Selecting bonuses;
3. Creating promo texts for short and detailed offer descriptions;
4. Defining the validity period of the offer; activating the offer.

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Each of the named steps corresponds to a specific section of the offer configuration dialog. The sections can be accessed by clicking the links **Conditions**, **Bonuses**, **Promo texts** and **Offer** at the top.

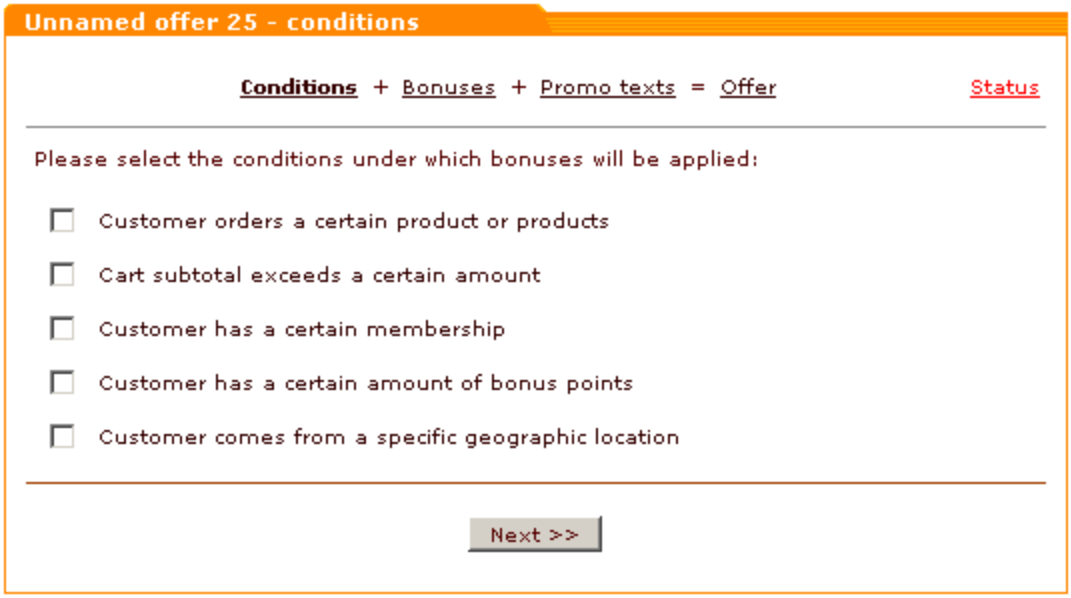

Figure 3. Offer configuration dialog.

The link **Status** in the top right corner of the offer configuration dialog allows you to make sure you have adjusted all the required offer settings. Red color of the link means offer configuration has not been finished. To find out which configuration steps still need to be completed, click the link. You will see a list of required configuration settings and their statuses.

Figure 4. Offer status: red links lead to the sections which need to be configured.

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The status links allow you to access the corresponding settings and (re)adjust them if necessary. Green links mark the settings which are already defined. Red links mark the settings that still need to be taken care of.

2.1 Conditions

The first thing you need to do while configuring a special offer is to set the conditions under which your special offer will be applied.

To set offer conditions, do the following:

1. Open the 'Conditions' section of the offer configuration dialog.

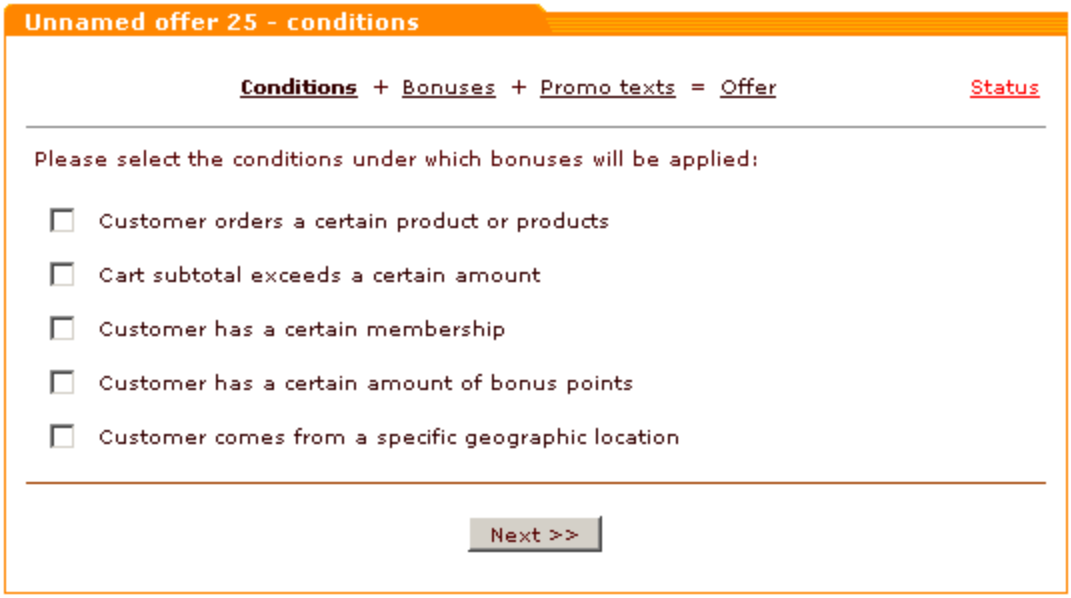

Figure 5. Offer configuration dialog: 'Conditions' section.

Note. This section opens automatically when you click the button **Add new** in the 'Offers' dialog. Another way to access this section is to click the link **Conditions** at the top of the offer configuration dialog or the link **Offer conditions** in the status section of the offer configuration dialog.

In the central part of the dialog window you will see five types of conditions:

- **Customer orders a certain product or products** - for offers similar to "All DVDs – Buy 3, Get 4th FREE" (customer orders 3 DVDs), "30% Off Hardcover Bestsellers Every Day" (customer orders a hardcover book), "Free 256MB expansion card with any Palm computer" (customer orders a Palm computer), "Buy a cell phone and a hands-free kit, get 200 bonus points" (customer orders a cell phone and a hands-free kit).

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- **Cart subtotal exceeds a certain amount** - for offers similar to “Free Shipping on any purchase over $40” (the subtotal order amount exceeds $40), “200 bonus points with orders of $200 or more” (the subtotal order amount is $200 or more).
- **Customer has a certain membership** - for offers similar to “Premium Members Save 20% June 7-23” (customer is a Premium member).
- **Customer has a certain amount of bonus points** - for offers similar to “10% off any purchase for 200 bonus points” (customer has 200 bonus points).
- **Customer comes from a specific geographic location** - for offers similar to “Free shipping on all orders within the Continental USA” (customer resides in the Continental USA), “Free shipping to all addresses within Bayfield county” (customer is from Bayfield county).

2. Decide on the type of condition that you want to set. Click on the selected condition. The dialog window will be expanded allowing you to configure the condition parameters.

3. Configure the condition parameters.

- If you have selected **Customer orders a certain product or products**, select what product(s) a customer will need to buy to become eligible for bonuses. You can select one specific product, several products (which will have to be ordered as a set) or a category. For each of the selected products/categories specify the product quantity that needs to be ordered. Select the action that the system should take if a customer orders more than one product or product set specified here (*Give bonus just once* or *Give bonus for each instance of this set*).

Note: the *Give bonus just once* or *Give bonus for each instance of this set* setting is only applicable to **'Offer products for free'** bonus option.

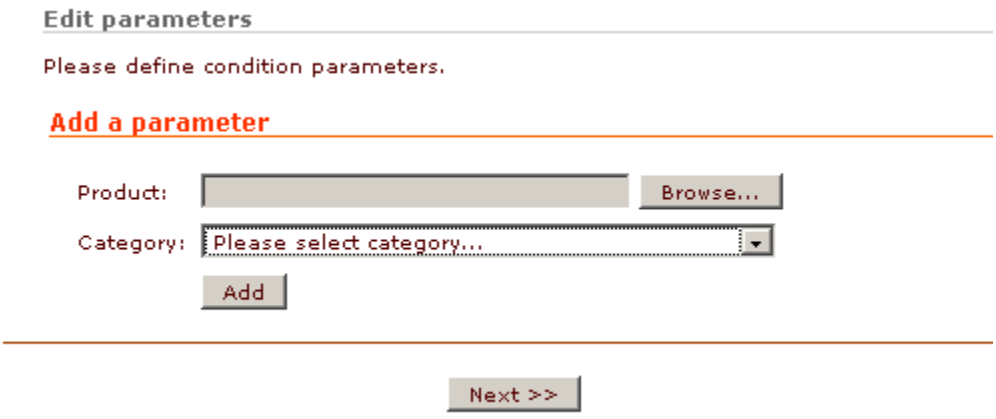

Figure 6. ‘Conditions’ section: the condition ‘Customer orders a certain product or products’ is expanded.

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- If you have selected **Cart subtotal exceeds a certain amount**, specify the range in which a customer's order subtotal must fall for the customer to be able to get bonuses. The minimum limit is supposed to equal the lowest (the maximum limit – the highest) order subtotal amount with which a customer will be eligible for bonuses. If no maximum limit is needed, simply set the maximum limit to 0.00.

Please note that this functionality enables you to define more than one subtotal amount ranges and use them for different special offers. For example, you can define two offers - A and B - whose application will depend on the subtotal amount. If you configure them so that the subtotal amount range for A is 100.00 - 199.99, and the subtotal amount range for B is 200.00 – 0.00 (assuming the currency is USD), offer A will be applied to orders with a subtotal of $100 or more (under $200); offer B will be applied to orders with a subtotal of $200 or more.

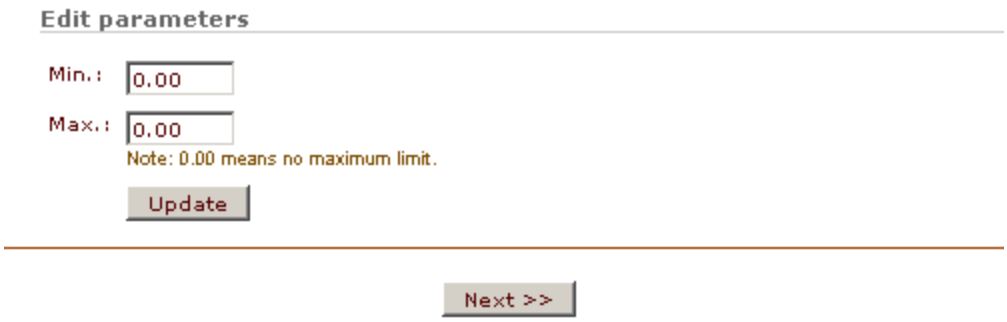

Figure 7. 'Conditions' section: the condition 'Cart subtotal exceeds a certain amount' is expanded.

- If you have selected **Customer has a certain membership**, specify a membership that a customer will need to have to be eligible for bonuses. If necessary, specify more than one membership (To do so, simply hold down Ctrl key while selecting the necessary memberships with your mouse). Please note that, in case of multiple memberships selected, ANY of the selected memberships entitles a customer to use the special offer.

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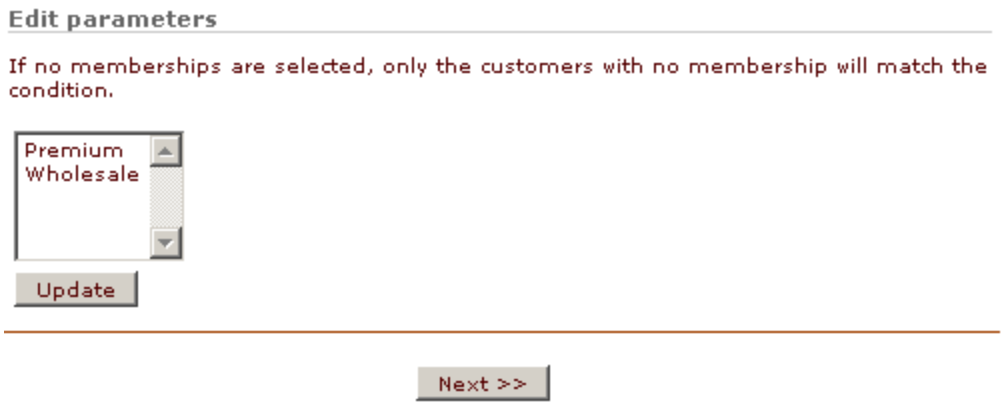

Figure 8. 'Conditions' section: the condition 'Customer has a certain membership' is expanded.

- If you have selected **Customer has a certain amount of bonus points**, specify the amount of bonus points that a customer is supposed to have to be eligible for bonuses. In a way similar to setting a subtotal amount range, you can specify the minimum and maximum limit for the amount of bonus points. If no maximum limit is needed, simply set the maximum limit to 0.00.

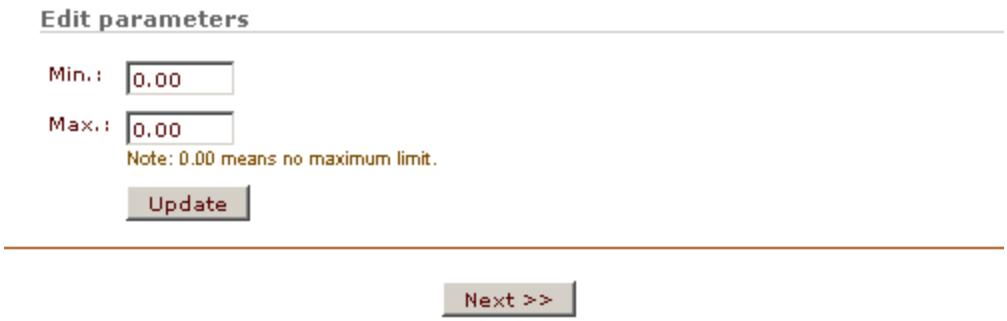

Figure 9. 'Conditions' section: the condition 'Customer has a certain amount of bonus points' is expanded.

- If you have selected **Customer comes from a specific geographic location**, specify, what destination zone a customer must come from to be eligible for offer bonuses. If necessary, several destination zones can be specified in one offer. For each of the zones, you can specify, which of the customer's addresses (billing or shipping) must belong to that zone.

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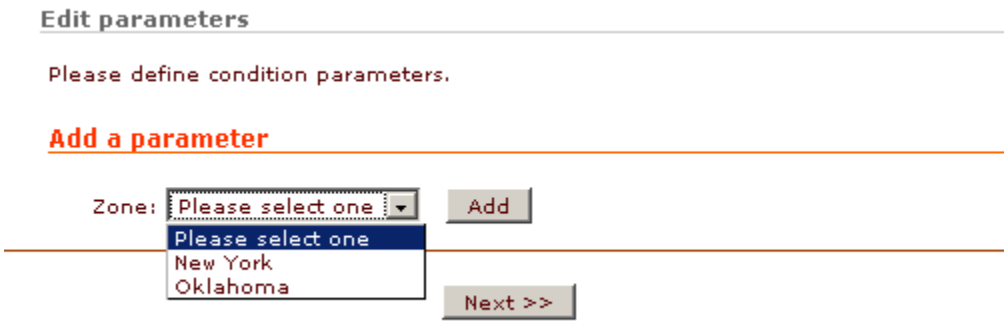
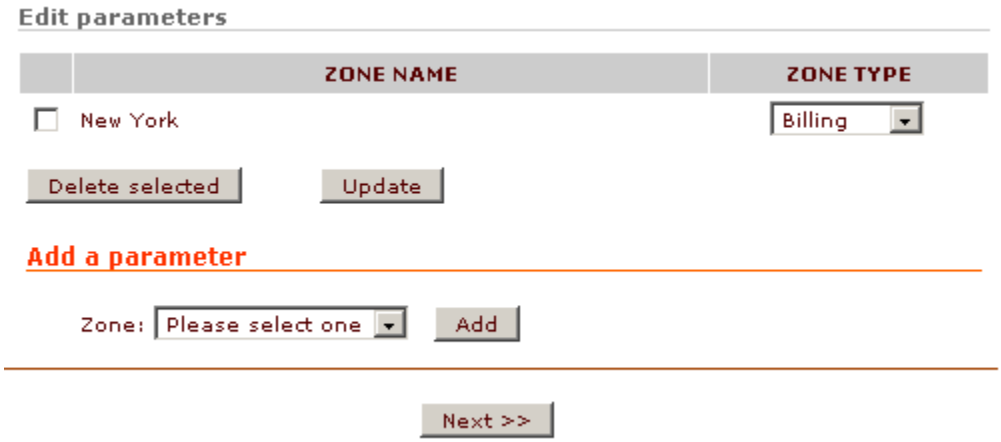


Figure 10. 'Conditions' section: the condition 'Customer comes from a specific geographic location' is expanded.

Click **Next**. The zone will be added to the list of zones applicable to this special offer.



Select zone type - *Billing* or *Shipping* from the corresponding drop-down box.

To remove a zone from the list select the check box next to the zone name and click **Delete selected**. When all the necessary zones have been included into the list, click **Update**. The condition parameters will be saved.

4. Select the check box next to the condition whose parameters you have just configured. Click **Update**. The condition will be assigned to the special offer being configured.

After all the necessary conditions have been set, you can move on to configuring offer bonuses.

2.2 Bonuses

To configure offer bonuses, do the following:

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1. Go to the ‘Bonuses’ section of the offer configuration dialog.

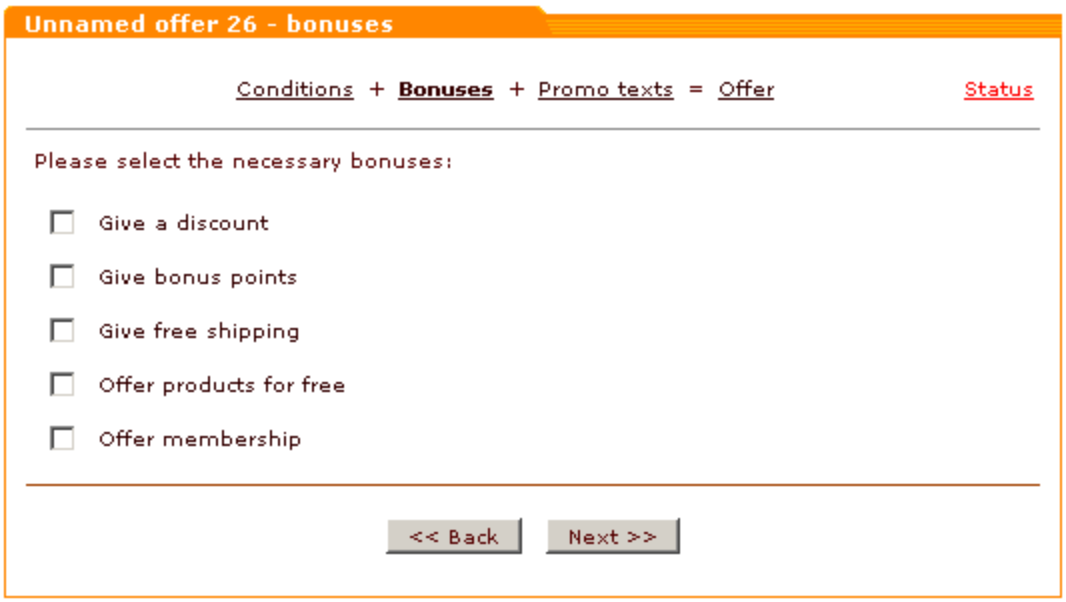

Figure 11. Offer configuration dialog: ‘Bonuses’ section.

Note. This section can be accessed by clicking the button **Next** in the ‘Conditions’ section of the offer configuration dialog, the link **Bonuses** at the top of the offer configuration dialog or the link **Offer bonuses** in the status section of the offer configuration dialog.

In the central part of the dialog window you see five types of bonuses:

- **Give a discount** - allows you to provide a discount on a specific product/several products/category/the whole customer’s shopping cart when offer conditions are satisfied. According to your needs, discounts may be expressed in percent or in absolute terms. It is possible to set a maximum limit for any discount (For example, “10% off the purchase, but not more than $100 off”).

- **Give bonus points** - allows you to give a customer bonus points with his purchase. Bonus points are conventional units which can be awarded to a customer if his order satisfies offer conditions. You define the amount of bonus points that a customer can receive on a special offer. Bonus points are added to a customer’s account automatically as soon as the customer’s order receives the status Complete. Upon collecting a certain amount of bonus points, a customer can convert them to a Gift Certificate. If you wish, you may also create special offers, according to which certain amounts of bonus points will entitle a customer to other bonuses (getting free products, discounts, memberships or free shipping).

- **Give free shipping** - allows you to provide free shipping on qualified orders. Please note that free shipping can be applied to specific products, specific categories or the whole customer’s shopping cart.

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- **Offer products for free** - allows you to enable your customers to receive free products. Please note that free products will only be added to a qualified order if the customer who is placing that order declares his wish to get some products free of charge in addition to the order.

- **Offer membership** - allows you to enable your customers to sign up for a membership that grants privileges in using the store. If a special offer that gives ability to sign up for some membership is applied to a purchase, the customer is informed about it by a message displayed in the shopping cart before checkout. As soon as the order gets the status Complete, the customer can visit the section 'My bonuses' available via Your cart menu and select a membership that he would like to have. The chosen membership will be granted to him automatically upon request. Please note that memberships are only given to customers who declare their wish to get them by signing up.

2. Decide on the type of bonus that you want to use.

3. Configure the bonus parameters:
   - If you have selected **Give a discount**, specify

     a) **Discount amount** - an amount by which the price of each product item that satisfies the parameters of the bonus discount will need to be reduced.

     b) Discount type - absolute or percent.

     c) Discount amount limitation (if any) - the upper limit for the discount defined in the 'Discount amount' field.

     d) What the discount needs to be applied to:
        - a specific product or products;
        - any products from a specific category or categories;
        - an entire shopping cart.

The bonus discount defined in this section will be applied to a customer's order on a per product item basis.

Note: When more than one special offers providing a discount on the same product item are available, only the maximum discount is applied.

Examples demonstrating usage of discount amount limitation:

1.

Product price: $40
Discount amount: 5% (Discount type = percent)
Limitation: $10
Calculating the discount amount: $40 * 5% = $2
Does the discount amount exceed the discount amount limitation? *No* ($2 < $10)
Calculating the discounted product price: $40 - $2 = $38

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2.

Product price: $40

Discount amount: 50% (Discount type = percent)

Limitation: $10

Calculating the discount amount: $40 * 50% = $20

Does the discount amount exceed the discount amount limitation? *Yes* ($20 > $10)

Calculating the discounted product price: $40 - $10 = $30

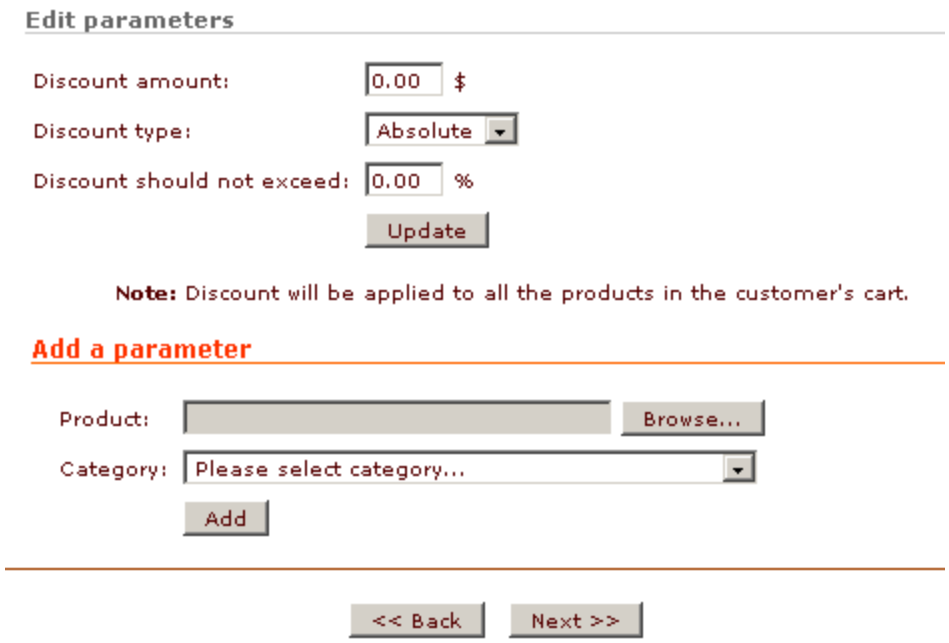

Figure 12. 'Bonuses' section: the bonus 'Give a discount' is expanded.

- If you have selected **Give bonus points**, specify the amount of bonus points that a customer will be given on the offer. A customer can get either a fixed amount of points for on order as a whole, or a certain amount of points per $ spent (the undiscounted subtotal is being used in the calculation).

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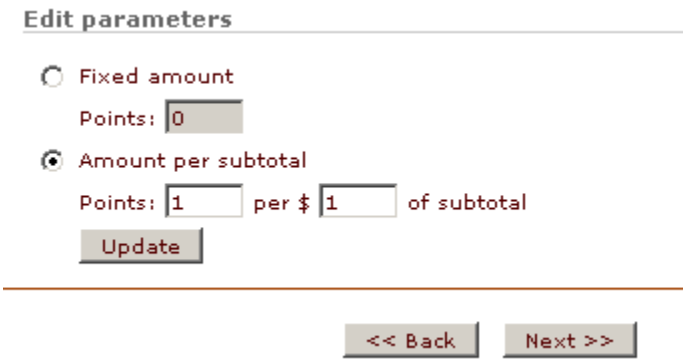

Figure 13. 'Bonuses' section: the bonus 'Give bonus points' is expanded.

- If you have selected **Give free shipping**,
- specify whether you want free shipping to be applied to specific products, categories or the whole shopping cart.

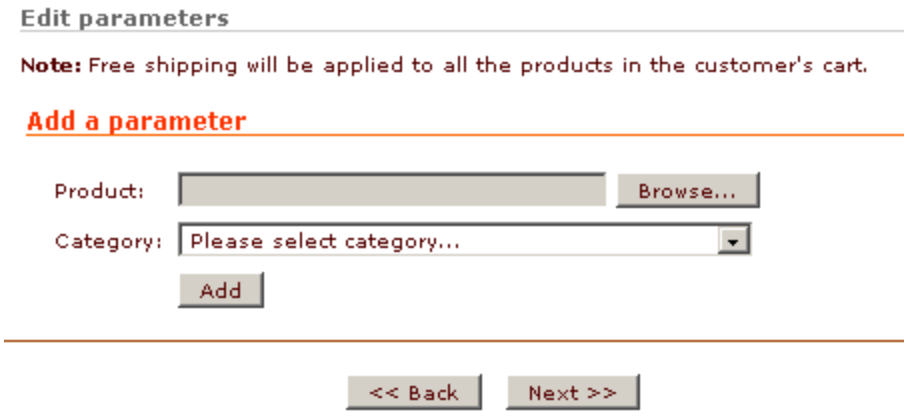

Figure 14. 'Bonuses' section: the bonus 'Give free shipping' is expanded.

- If you have selected **Offer products for free**, specify, which products should be offered to a customer if the offer conditions are satisfied. You can specify particular products or a category/categories from which a customer will be able to choose a certain number of products by himself.

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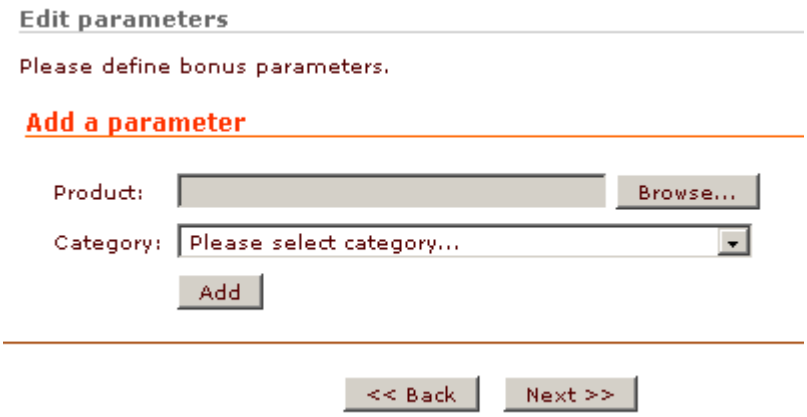

Figure 15. 'Bonuses' section: the bonus 'Offer products for free' is expanded.

- If you have selected **Offer membership**, specify what membership should be offered to a customer if the offer conditions are satisfied. If necessary, you can specify more than one membership so the customer will be able to choose.

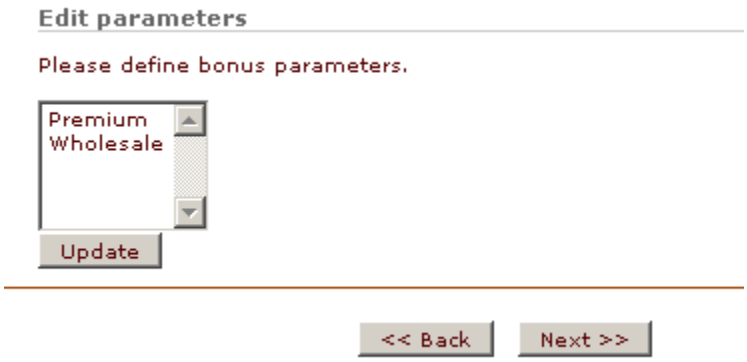

Figure 16. 'Bonuses' section: the bonus 'Offer membership' is expanded

Click **Update**. The parameter will be saved.

4. Now select the checkbox next to the title of the bonus whose parameters you've just defined. Click **Next>>**. The bonus will be assigned to the special offer being configured.

After all the necessary bonuses have been defined, you can move on to configuring promo blocks.

2.3 Promo texts

The module supports two types of offer descriptions: short and detailed. Short descriptions are used in

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short promo blocks appearing at the top of store pages. Detailed descriptions are used for the 'Special offers' page and other pages providing detailed information about offers. Both short and detailed descriptions may contain HTML-formatted text and/or images. You can create offer descriptions via the section 'Promo texts' of the offer configuration dialog.

To create descriptions that will be used in the offer's short and detailed promo blocks, do the following:

1. Go to the 'Promo texts' section of the offer configuration dialog.

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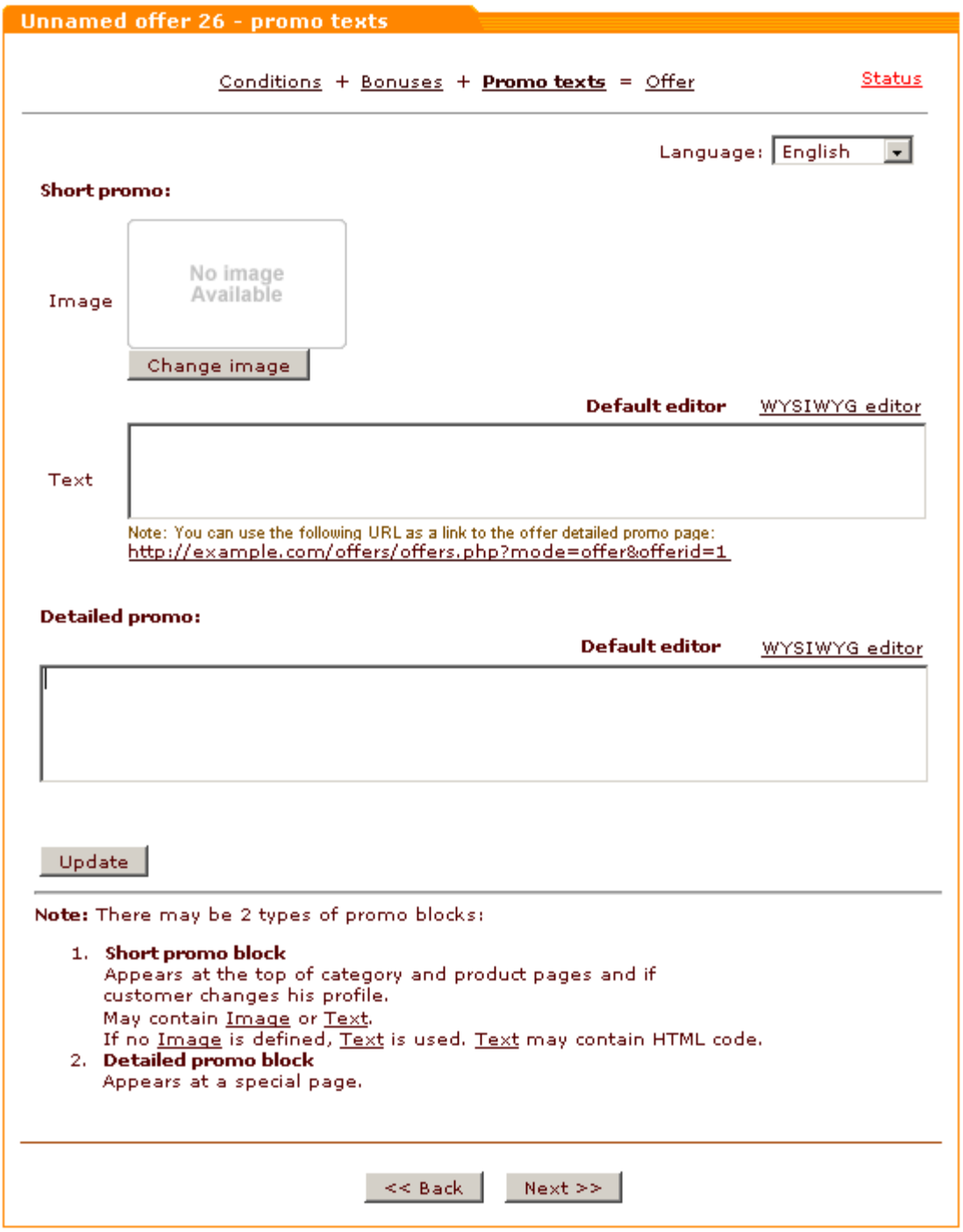

Figure 17. Offer configuration dialog: 'Promo texts' section.

Note. This section can be accessed by clicking the button **Next** in the 'Bonuses' section of the offer configuration dialog or the link **Promo texts** at the top of the offer configuration dialog.

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2. Create a short description of the offer for use in a short promo block. Do one of the following:
   a) If all the information that needs to be demonstrated in the short promo block is contained in a single image file, use the field 'Image' to select the necessary file. Click on **Update** to apply the changes.
   b) If you want your short promo block to contain text, use the field 'Text' to enter the information about the special offer. You can use either plain or HTML-formatted text. If you need to include images, create links to them using the href attribute. To save the changes, click on **Update**.

Short promo blocks based on an image or consisting of plain text are clickable: they allow your store visitors to access the detailed offer description. If you use HTML formatting, the promo block does not become clickable automatically. If you need it clickable, be sure to use the link provided below the 'Text' field in the HTML code of your short promo block.

3. Create a detailed description of the offer for use in a detailed promo block by entering the necessary offer info into the 'Detailed promo' field. You can use either plain or HTML-formatted text. If you need to include images, create links to them using the href attribute. To save the changes, click on **Update**.

Note. If you want to create promo blocks in languages other than the default store language, choose the necessary language from the drop-down box in the top right corner of the 'Promo texts' section, enter the text in that language into the 'Short promo' and 'Detailed promo' fields and click on **Update**.

After the necessary promo blocks have been created, you can move on to the final step of offer configuration - setting offer details.

2.4 Offer details

The final configuration step allows you to enable the created offer and define some important offer details (short name and validity period).

To define offer details, do the following:

1. Go to the 'Offer details' section of the offer configuration dialog.

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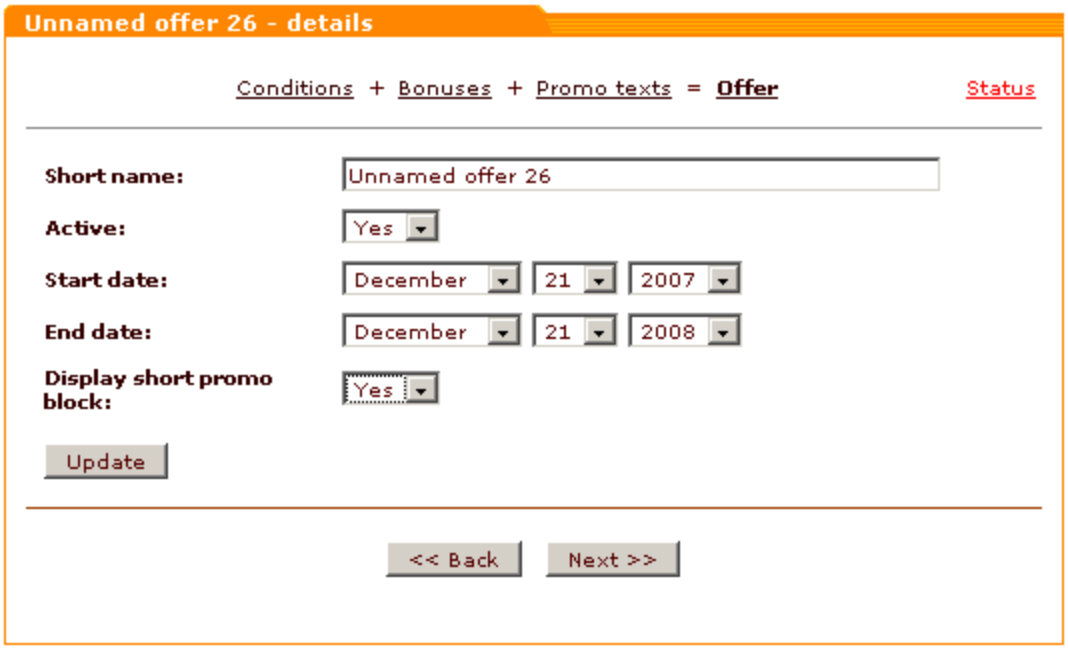

Figure 18. Offer configuration dialog: 'Offer details' section.

Note. This section can be accessed by clicking the button **Next** in the 'Promo texts' section of the offer configuration dialog, the link **Offer** at the top of the offer configuration dialog or the links **Active** or **Validity period** in the status section of the offer configuration dialog.

2. Think of a short name that would help you recognize the offer you've created among the other offers in your store. Enter the name into the 'Short name' field.
3. Use the 'Start date' and 'End date' to define the period during which the offer will be valid.
4. Specify whether you want a short promo block to be used for this offer.
5. Click **Update**.
6. Make sure all the necessary settings have been adjusted properly (The link **Status** at the top right of the offer configuration dialog must be green).
7. Make the offer available to customers: select *Yes* from the 'Active' drop-down box.
8. Click **Update**.

If you have properly completed all the configuration steps, your offer is now ready for use.

Note. Clicking the button **Next** at this step allows you to access the status section of the offer configuration dialog. Clicking the link **List**

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of offers in the section menu allows you to see your offers list. Clicking the link **Create a new offer** in the section menu allows you to create and configure a new offer.

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3 Examples of configuring special offers

Two examples of configuring special offers with different conditions, bonuses and other offer details are given in this chapter:

Example 1;
Example 2.

3.1 Example 1: '10 Audio CDs + 1 FREE Audio CD'

Let us create a special offer according to which a customer who buys any 10 audio CDs will be able to get another audio CD for free.

Configuring conditions for the offer '10 Audio CDs + 1 FREE Audio CD'

1. In the 'Conditions' section of the offer configuration dialog, click the link Customer orders a certain product or products. The dialog window will be expanded allowing you to configure the condition parameters.

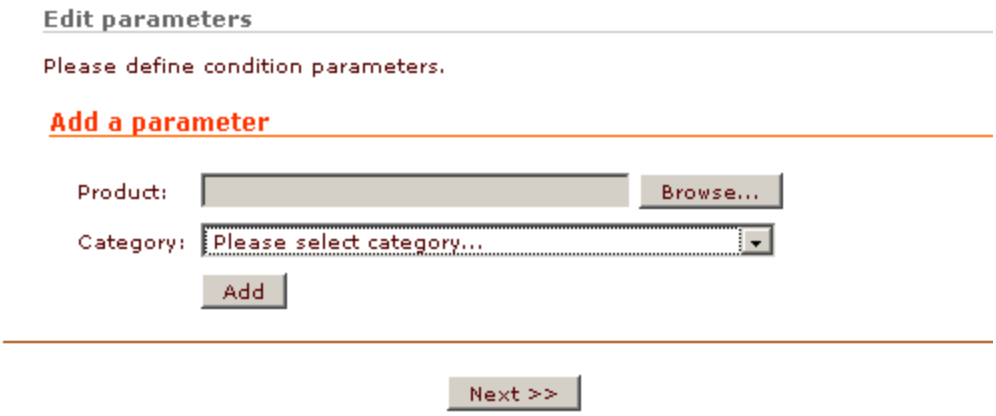

Figure 1. 'Conditions' section: the condition 'Customer orders a certain product or products' is expanded.

2. Configure the parameters for the chosen condition.
   In our example, it is not important, which audio CDs a customer will buy. Practically, they can be any 10 CDs from the catalog category "CD audio". In this case, setting the condition boils down to building the expression "Any 10 products from the category 'CD audio'". Let's see how this can be done.
   Select the necessary product category from the 'Category' drop-down box in the section 'Add a parameter':

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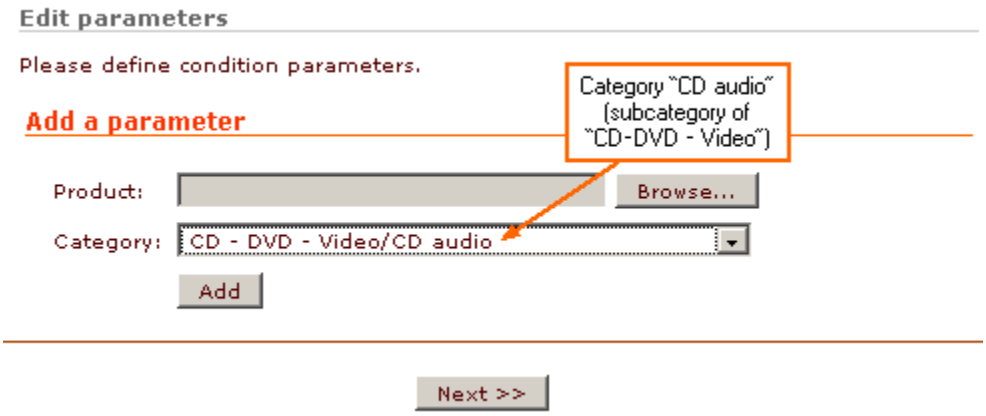

Figure 2. 'Conditions' section: the category 'CD audio' has been selected from the 'Category' drop-down box.

Click on the **Add** button below. The selected category will be added to the condition expression:

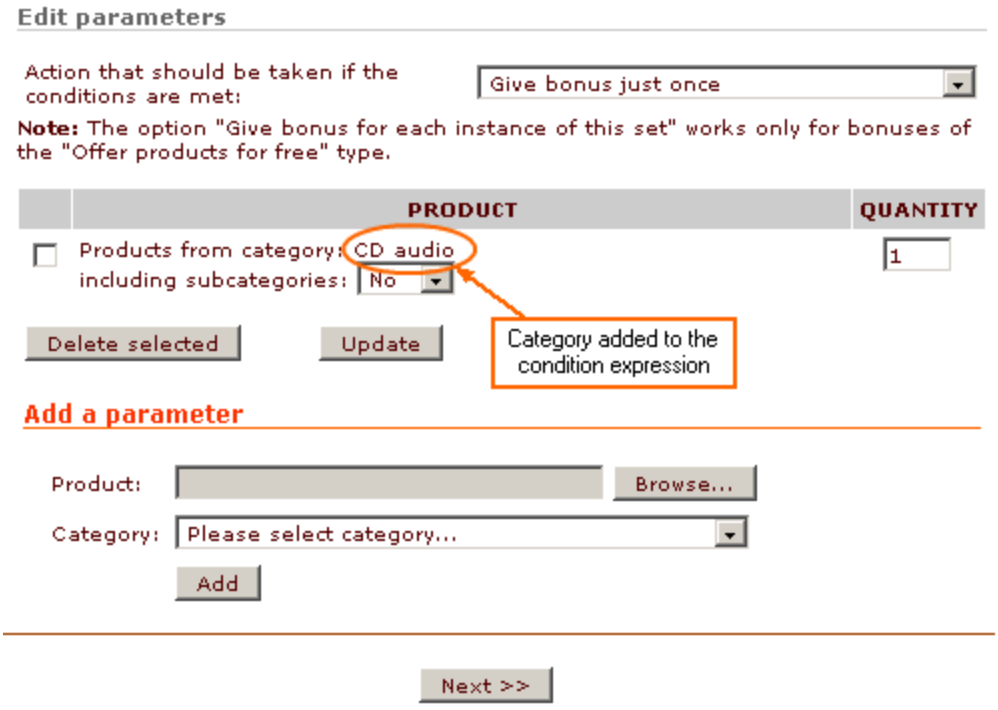

Figure 3. 'Conditions' section: the category 'CD audio' has been added to the condition expression.

The category "CD audio" does not have any subcategories, so it does not matter what is selected in the ' including subcategories' drop-down box. We just leave the value of this box as is.

Note. Had we chosen to select a category with subcategories, we could specify whether we want products from the subcategories to be

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covered by this offer or not.

Now you need to define how many products a customer will need to buy to get bonus(es) on this offer and how many times he will be able to get them.

We've already decided that a customer will need to buy at least ten audio CDs to be able to use the special offer being created. Accordingly, enter the required number of products (10 CDs) into the 'Quantity' field.

Note. If necessary, you can specify several categories or products within one condition. In this case, only the customers who will buy ALL the products specified in the condition will be eligible for bonuses.

The second part of the question probably needs some explanation. In practice, we are supposed to provide an instruction to the system as to what it should do if a customer buys, for example, not ten, but twenty or thirty audio CDs. With ten CDs, it's clear: a customer just gets one free CD, and that's it. Does he get three CDs free of charge if he buys thirty? Or is it that he can get a free CD just once, no matter how many audio CDs he buys this time?

Please turn your attention to the drop-down box 'Action that should be taken if the conditions are met'.

If you want your customers to be able to use the special offer being created just once per order, select the option '*Give bonus just once'*. In this case, if a customer orders 20 CDs, or any other number of CDs divisible by 10, he will only get 1 audio CD for free.

If you want your customers to get a free CD for every 10 CDs that they purchase in one order, select the option '**Give bonus for each instance of this set'**. In this case, if a customer orders 20 CDs, he will get 2 audio CDs free of charge; if he orders 50 CDs, he will get 5 CDs, etc.

Suppose, we've chosen to apply the special offer bonuses every time the conditions are met:

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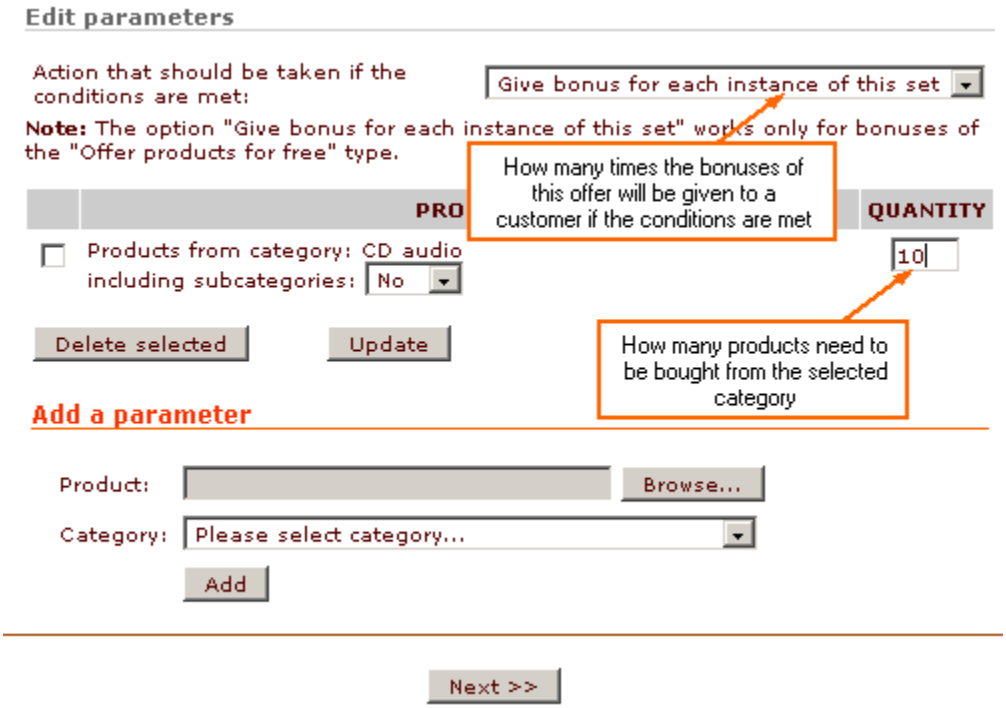

Figure 4. 'Conditions' section: the number of products and the type of system action have been specified.

Click on the **Update** button. The condition parameters will be saved.

3. Select the check box next to the condition whose parameters you've just configured.

Click on **Update**. The condition will be assigned to the special offer being configured. Now you can move on to configuring offer bonuses.

Configuring bonuses for the offer '10 Audio CDs + 1 FREE Audio CD'

1. In the 'Bonuses' section, click the link **Offer products for free**. The dialog window will be expanded allowing you to configure the bonus parameters.

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Figure 6. 'Bonuses' section: the bonus 'Offer products for free' is expanded.

2. Configure the bonus parameters.

Select the necessary product category from the 'Category' drop-down box in the section 'Add a parameter'. Set the number of products that will be given to a customer for free:

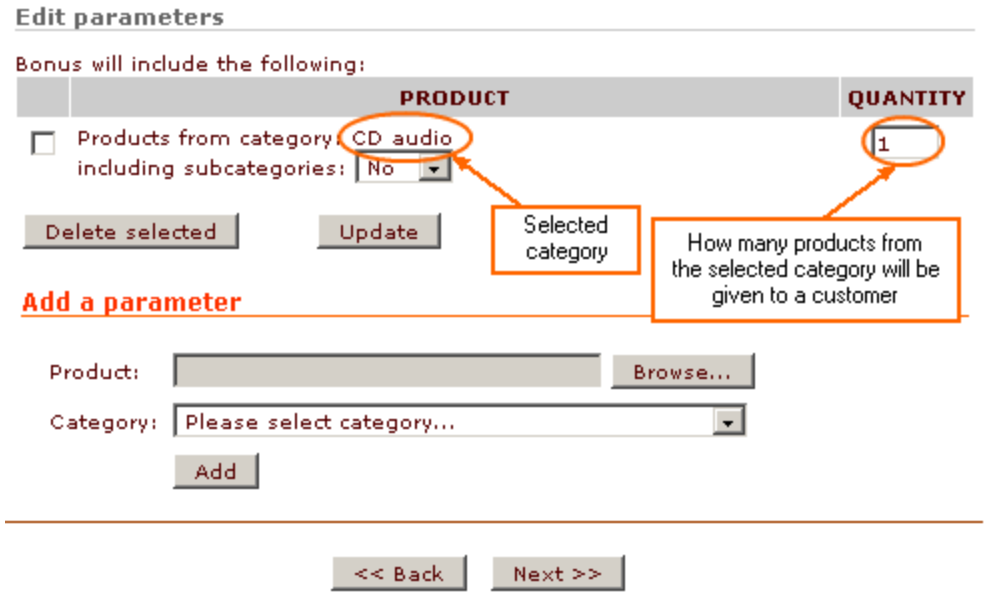

Figure 7. 'Bonuses' section: the category and number of the products that will be given as a bonus have been specified.

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Click on **Update**. The parameter will be saved.

3. Now select the checkbox next to the title of the bonus whose parameters you've just defined:

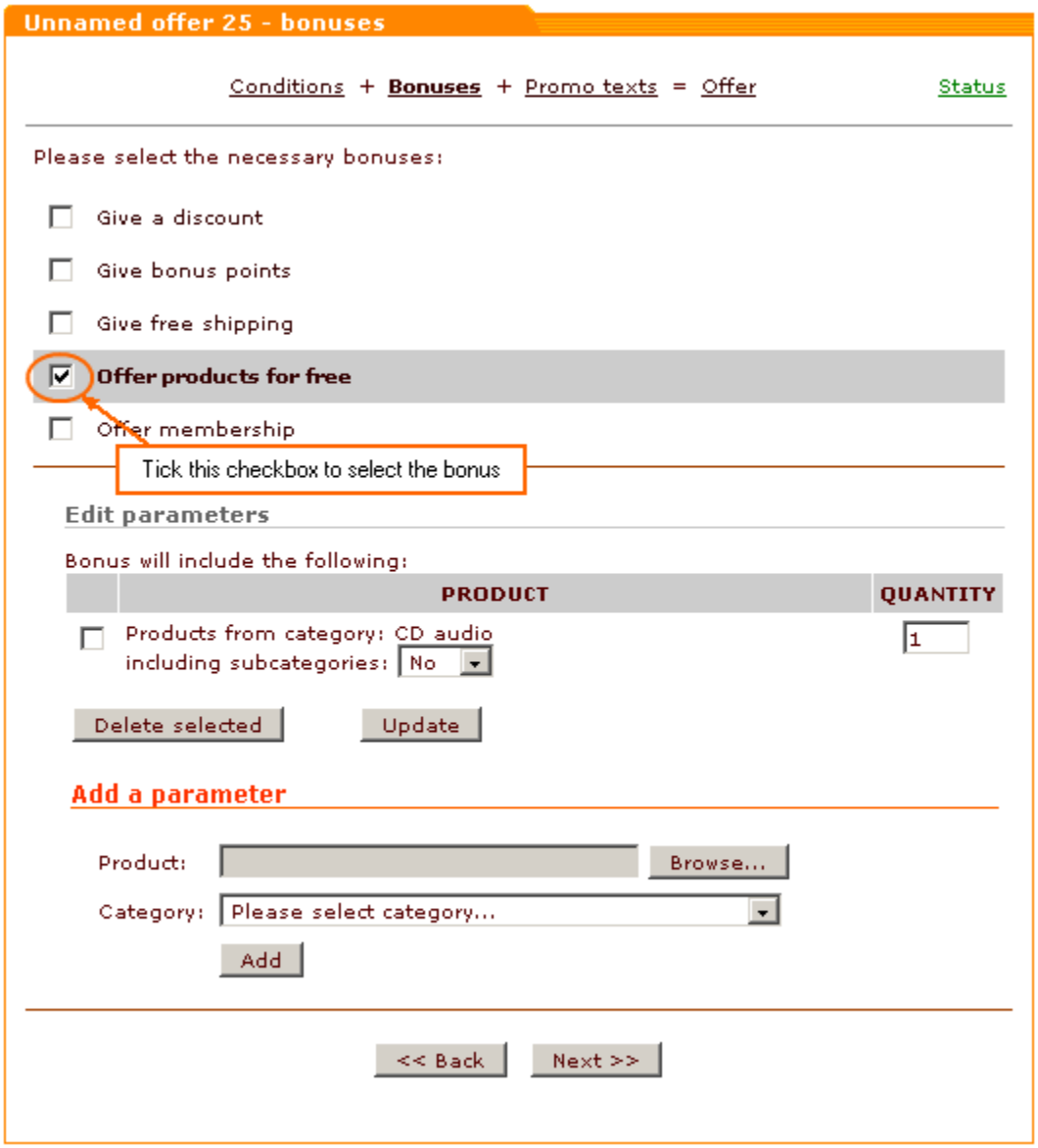

Figure 8. 'Bonuses' section: the bonus 'Offer products for free' has been assigned to the offer.

Click on **Update**. The bonus will be assigned to the special offer being configured.

Now that you have defined all the necessary bonuses, you can move on to configuring promo blocks.

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Configuring promo blocks for the offer '10 Audio CDs + 1 FREE Audio CD'

Let us create an advertisement for the special offer being created. For the sake of example, we'll try to keep the advertisement as simple as possible: the short promo block will contain a textual link to a detailed description of the offer; the detailed block will also be just a line of text.

To configure the short promo block, enter the text of your advertisement into the field 'Text' in the 'Short promo' section. As we do not need the link to be anything but plain text, we do not use any HTML formatting. This makes the textual part of the short promo block clickable.

To configure the detailed promo block, enter the offer details into the 'Detailed promo' section. To make the text of the detailed promo more conspicuous, format it using HTML tags (for example, <H2> … </H2>).

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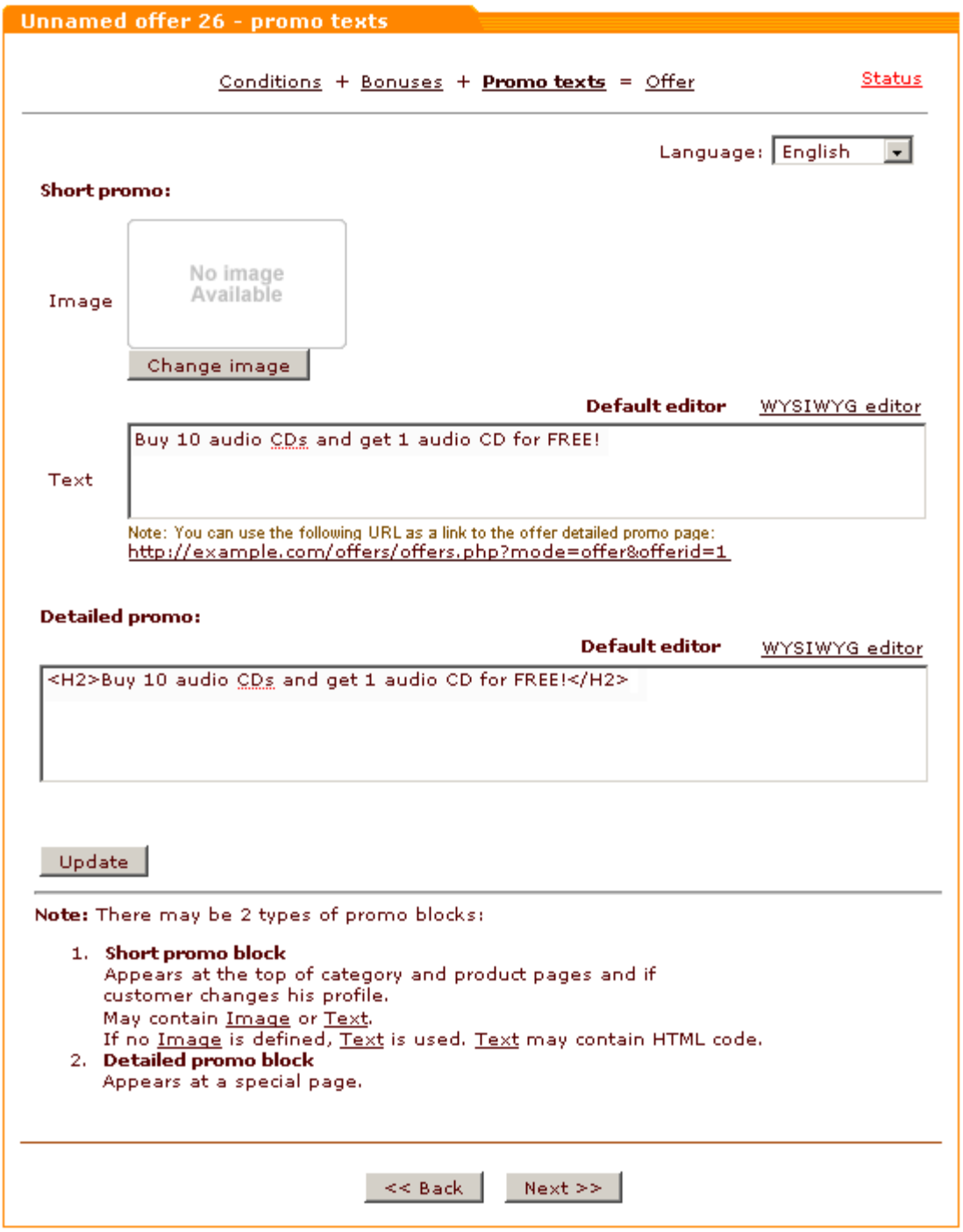

Figure 9. 'Promo texts' section: short and detailed promo blocks have been created.

Click on **Update**. The promo blocks will be saved.

Configuring offer details for the offer 10 Audio CDs + 1 FREE Audio CD

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1. Use the ‘Short name’ field of the ‘Offer details’ section to enter the name “10 Audio CDs + 1 FREE Audio CD”.
2. Use the ‘Start date’ and ‘End date’ to define the period during which the offer will be valid.
3. Use the ‘Display short promo block’ field to specify whether you want to use a short promo block to advertise the offer being created (This option will only work if you have created a short promo text at the previous configuration step. Selecting Yes enables display of the short promo block for this offer. Selecting No hides the short promo block).
4. Click on **Update**.
5. Make sure all the necessary settings have been adjusted properly (The link **Status** at the top right of the offer configuration dialog must be green).
6. Make the offer available to customers: select *Yes* from the ‘Active’ drop-down box.

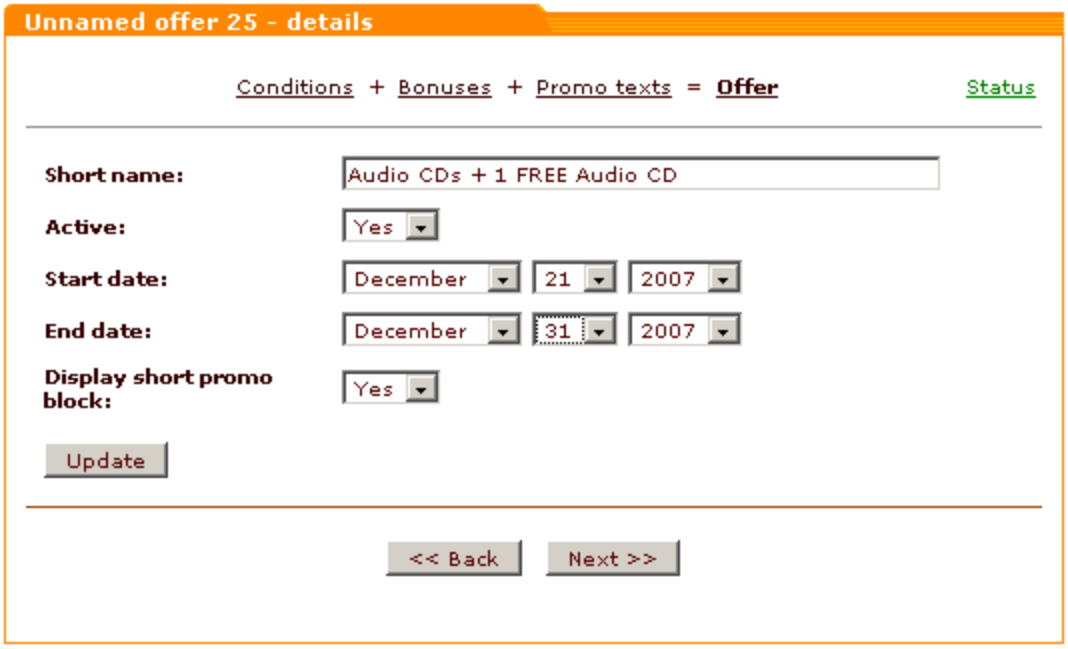

Figure 10. ‘Offer details’ section: offer short name and validity period have been specified; offer status has been set to ‘Active’.

7. Click **Update**.

If you have properly completed all the configuration steps, your offer is now ready for use.

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3.2 Example 2: 'Walkman + shoes + t-shirt'

Let us create a special offer according to which a customer who buys a walkman (SONY WM-3300), a pair of shoes (PATRICK Maracana HG Cleats) and a T-shirt (any product from the category 'T-shirts') will be able to get a free copy of the book HTML 4 for the World Wide Web.

Configuring conditions for the offer 'Walkman + shoes + t-shirt'

1. In the 'Conditions' section of the offer configuration dialog, click the link **Customer orders a certain product or products**. The dialog window will be expanded allowing you to configure the condition parameters.

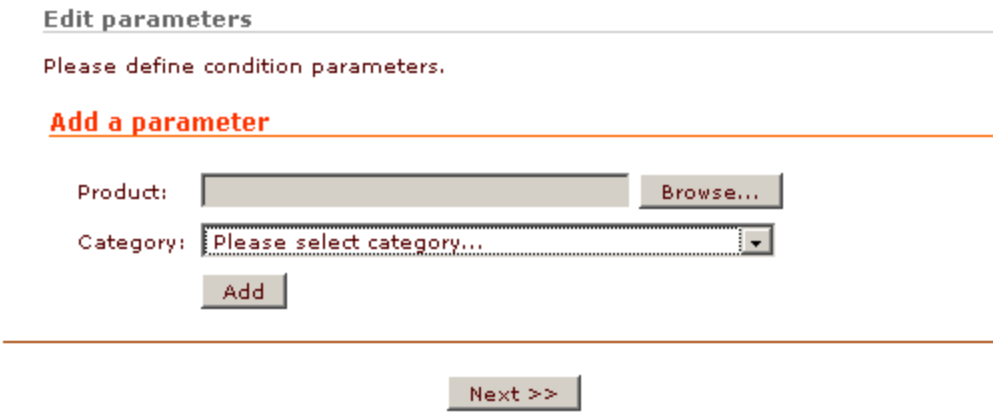

Figure 11. 'Conditions' section: the condition 'Customer orders a certain product or products' is expanded.

2. Configure the parameters for the chosen condition:

Click on the **Browse** button next to the field 'Product'. A new window displaying the dialog box 'Choose a product' will appear.

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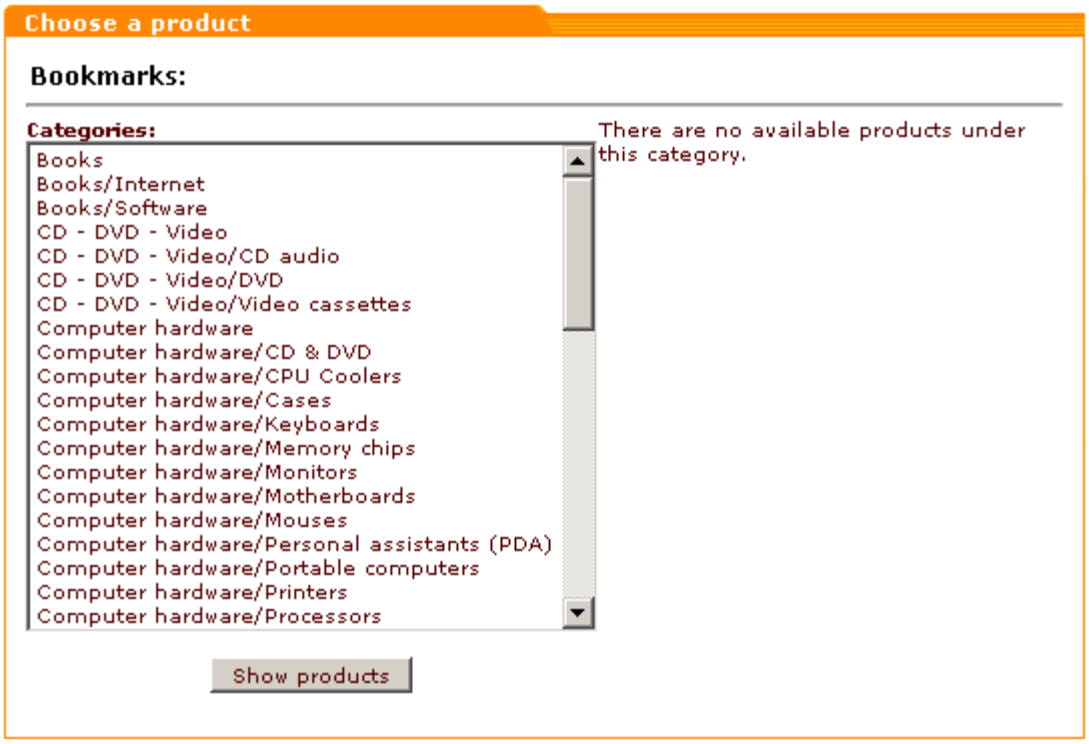

Figure 12. 'Choose a product' dialog box.

Use the 'Choose a product' dialog to select the product SONY WM-3300 (Select the category in which the product SONY WM-3300 is located from the 'Category' section -> Click on the **Show products** button -> Click on the product title SONY WM-3300 in the 'Products' section -> Click on the **Select** button below the 'Products' section).

The name of the selected product will appear in the 'Product' field:

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Figure 13. 'Conditions' section: the product 'SONY WM-3300 MY FIRST RGE' has been selected.

Click on **Add**. The selected product will be added to the condition expression:

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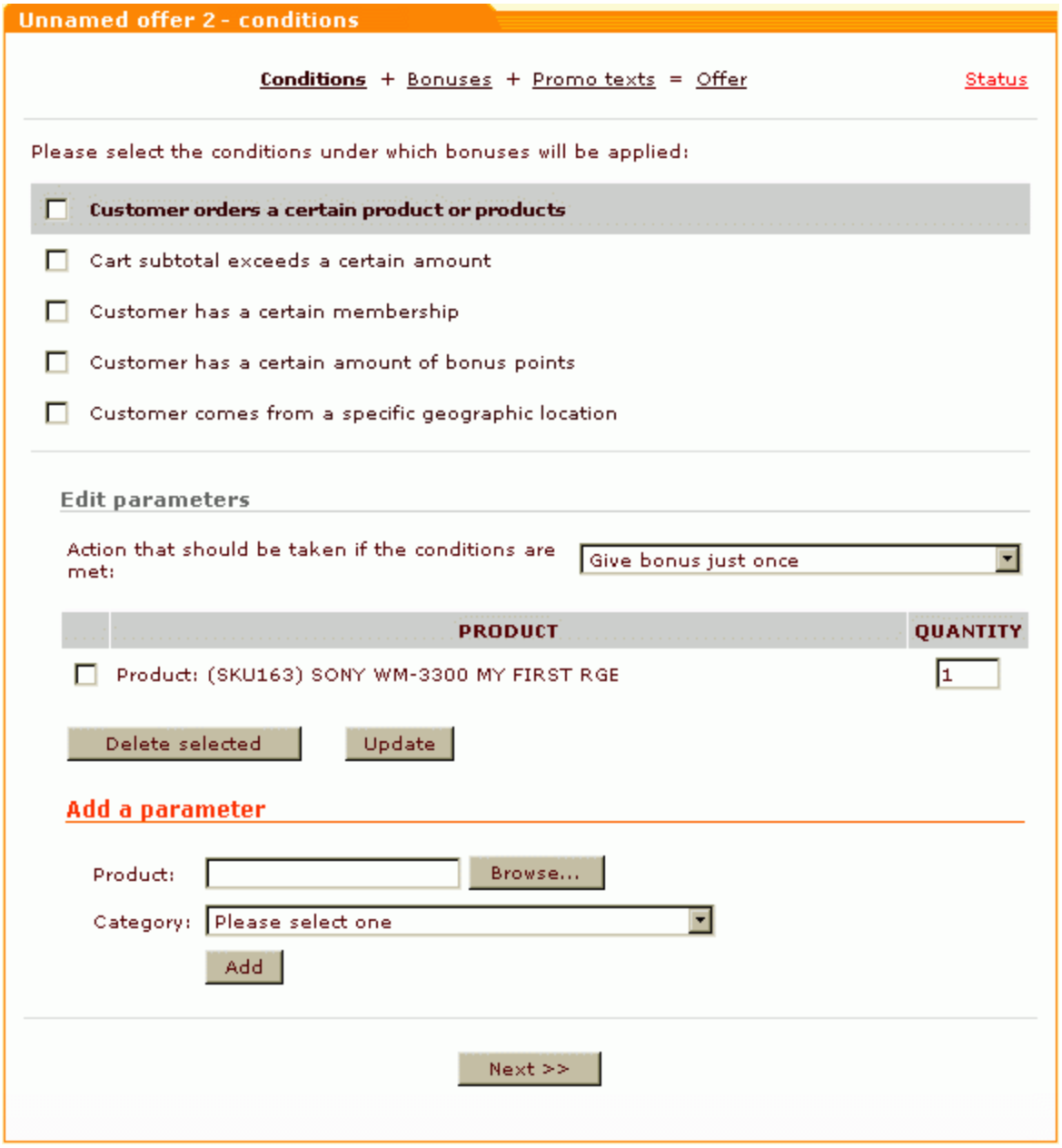

Figure 14. 'Conditions' section: the product 'SONY WM-3300 MY FIRST RGE' has been added to the condition expression.

Similarly, locate the product PATRICK Maracana HG Cleats and add it to the condition expression.

Then select the category 'Men's clothes/T-shirts' from the 'Category' drop-down box, click on **Add**. The category will be added to the condition:

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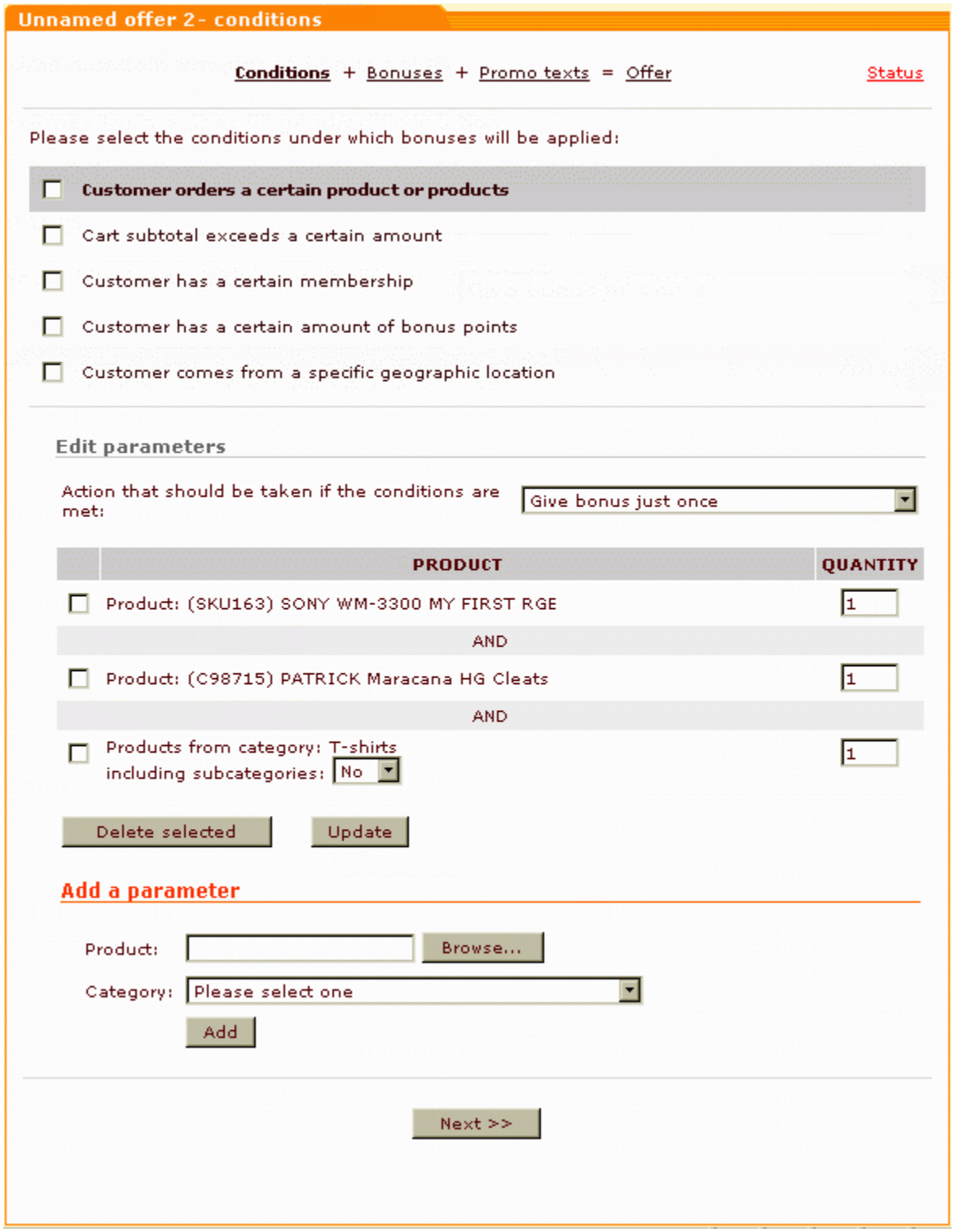

Figure 15. 'Conditions' section: the product 'PATRICK Maracana HG Cleats' and the category 'T-shirts' have been added to the condition expression.

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Note. The products and categories added to one condition are joined by AND, which means that only the customers who will buy ALL the products specified in the condition will be eligible for bonuses.

As a customer only needs to buy one item of each product to be able to use this offer, leave the product quantity in all the boxes set to “1”.

Define, how many times per order a customer will be able to get a free copy of the book HTML 4 for the World Wide Web. Select the option ‘Give bonus for each instance of this set’ if you want to enable your customers to get as many books as the number of ‘Walkman + shoes + t-shirt’ sets in their order. Select the option ‘Give bonus just once’ if you want to limit the number of bonus books given for free to one book per order.

Click on the **Update** button. The condition parameters will be saved.

3. Select the check box next to the condition whose parameters you’ve just configured.

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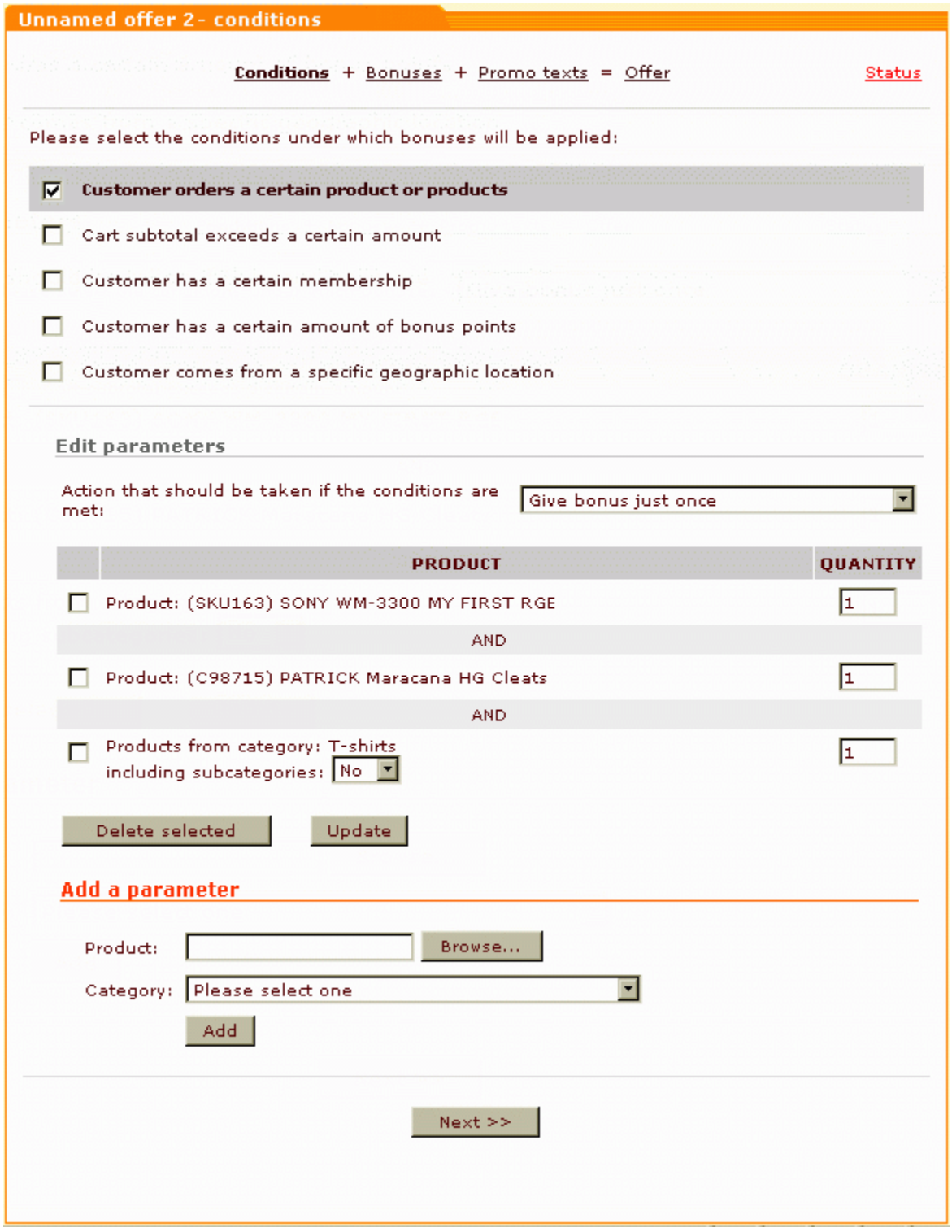

Figure 16. 'Conditions' section: the condition 'Customer orders a certain product or products' has been assigned to the special offer.

Click on **Update**. The condition will be assigned to the special offer.

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Now you can move on to configuring offer bonuses.

Configuring bonuses for the offer 'Walkman + shoes + t-shirt'

1. In the ‘Bonuses’ section, click the link Offer products for free. The dialog window will be expanded allowing you to configure the bonus parameters.

2. Configure the bonus parameters.
   Select the product HTML 4 for the World Wide Web using the Browse button in the section ‘Add a parameter’. Set the number of products that will be given to a customer to “1”.
   Click on **Update**. The parameter will be saved.

3. Select the checkbox next to the bonus title Offer products for free.
   Click on **Update**. The bonus will be assigned to the special offer being configured.

Now that you have defined all the necessary bonuses, you can move on to configuring promo blocks.

Configuring promo blocks for the offer 'Walkman + shoes + t-shirt'

Suppose we want the short and detailed promo blocks to look as follows:

To create a link from the short to the detailed promo block, to boldface some of the words and to arrange the product titles in the form of a list, we’ll need some HTML.

First, let’s create a short promo block with a link to the detailed offer description. Leave the ‘Image’ field empty. Enter the following piece:

```
<CENTER>
```

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```
<A href="http://example.com/offers.php?mode=offer&offerid=2">
Special offer for internet programmers!<BR>
Get your <B>FREE</B> copy of <B>HTML 4 for the World Wide Web!</B>
</A>
</CENTER>
```

into the field ‘Text’ in the ‘Short promo’ section. Make sure you replace the target URL "http://example.com/offers.php?mode=offer&offerid=2" by the URL from below the ‘Text’ field in the ‘Short promo’ section. Please note that you can use a relative path ("offers.php?mode=offer&offerid=2") instead of the full path.

Now, let’s create a detailed promo block. Enter the following piece:

```
<IMG border="0" src="http://example.com/path/to/file/offer.gif" align="right">
<H2>A FREE book "<A class="NavigationPath" href="product.php?productid=68">HTML
<UL>
<LI> 1 (one) <A class="NavigationPath" href="product.php?productid=163">SONY WM
<LI> 1 (one) <A class="NavigationPath" href="product.php?productid=16123">PATRI
<LI> and 2 (two) <A class="NavigationPath" href="product.php?productid=16130">P
</UL>
```

into the ‘Detailed promo’ section, replacing the image source URL "http://example.com/path/to/file/offer.gif" by a valid image URL or file path. To create links to products, copy product URLs from the address line of your browser and use them as values of the href attribute in product links (for instance, <A class="NavigationPath" href="http://example.com/product.php?productid=68&cat=23&page=1">HTML 4 for the World Wide Web</A>" or <A class="NavigationPath" href="product.php?productid=68">HTML 4 for the World Wide Web</A>").

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Figure 17. 'Promo texts' section: short and detailed promo blocks have been created.

Click on **Update**. The promo blocks will be saved.

Configuring offer details for the offer 'Walkman + shoes + t-shirt' is done in the usual way.

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4 Managing existing special offers

All the special offers existing in your store can be seen in the Offers list. To access the Offers list, click Special offers in the Inventory menu or the link **List of offers** in the 'Special offers' section menu.

Figure 1. Offers list.

Special offers appear in the list by the short names given to them at the last step of offer configuration. Clicking on an offer name provides access to the details of that offer and allows you to view/edit the offer conditions, bonuses, promo texts, availability and validity period.

The links in the STATUS column show the current status of the offers:

- **available** means all the settings necessary for the functioning of the offer are provided and today's date is somewhere within the offer validity period;
- **upcoming** means all the settings necessary for the functioning of the offer are provided, but the offer validity period has not begun yet;
- **expired** means the offer validity period is over;
- **incomplete** means the offer configuration has not been finished properly.

Clicking on a status link allows you to update the status of an offer.

The **ACTIVE** column shows which of your special offers are currently active (available to customers):

- selected checkboxes mark the offers which are currently available to customers;

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- unselected checkboxes mark inactive offers;
- inactive checkboxes mark the offers which cannot be active (expired or incomplete offers).

You can change the availability of your special offers by selecting/unselecting the checkboxes in the ACTIVE column. Be sure to click on **Update** to apply the changes.

The special offers you no longer need may be deleted. To delete one or more special offers, select the checkbox(es) to the left of the offer name(s) and click on **Delete selected**. To select/unselect all existing special offers at once, use the links **Check all / Uncheck all** at the top of the Offers list.

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5 Managing bonus points

Information about the number of bonus points that a customer has is stored in the customer's profile. In some cases, it may be necessary to change the number of bonus points that a customer has on his account. The task of editing the number of collected bonus points may be performed by a person with administrative privileges.

To change the number of bonus points, do the following:

1. In the administrative interface, search for the necessary user profile (Management menu -> Users Management -> Search for users).
2. Scroll down to the profile section 'Customer bonuses'.

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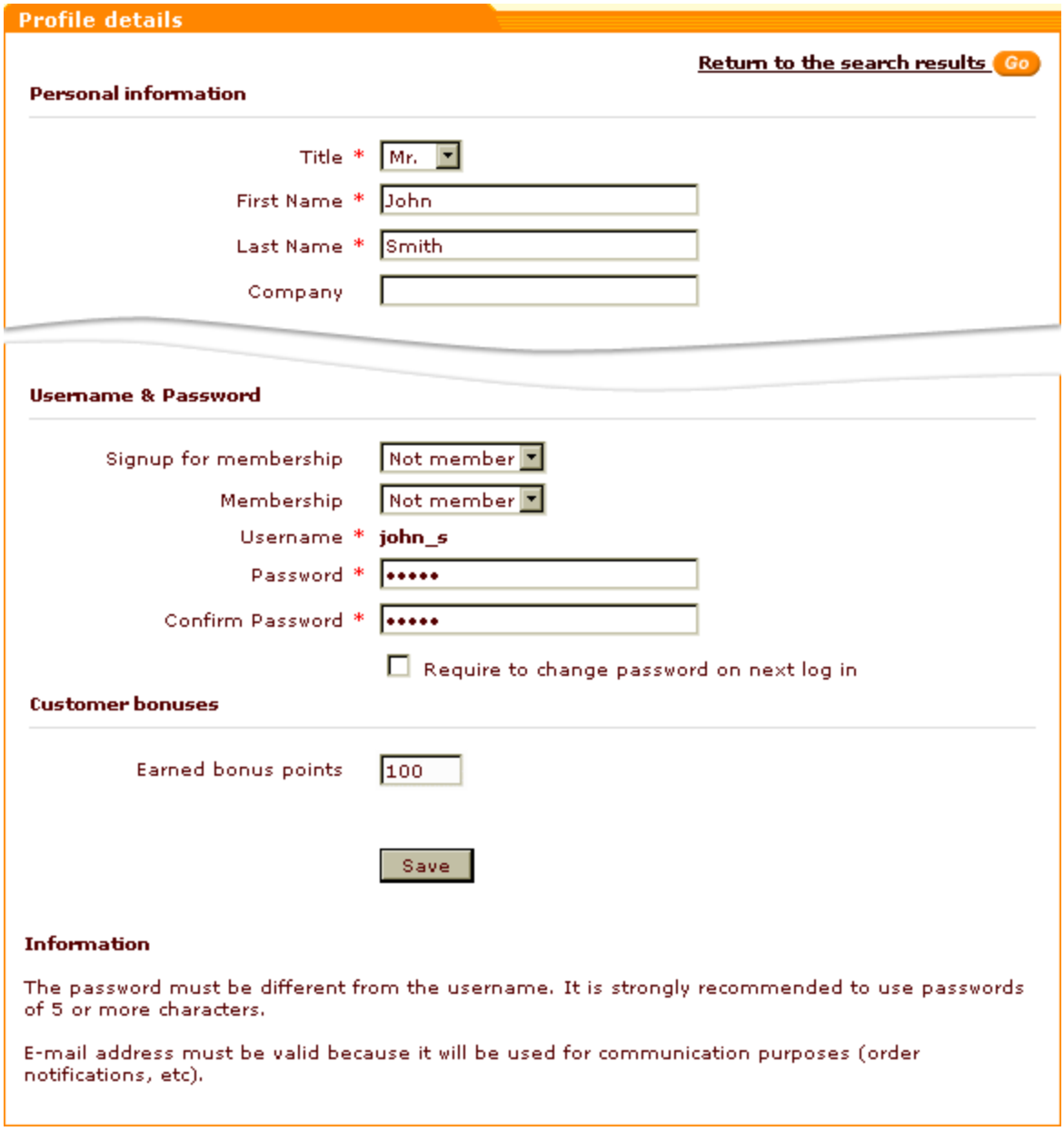

Figure 1. User profile details: Customer bonuses.

3. Edit the number in the field ‘Earned bonus points’.

4. Click on **Save**. The number of bonus points will be updated.

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6 Appendix

Here is a list of files included into the module.

```
INSTALL.X-OFFERS
bonuses.php
install-xoffers.php
offers.php

modules/Special_Offers/…
calculate.php
calculate_init.php
calculate_prepare.php
calculate_result.php
calculate_return.php
calculate_subtotal.php
category_offers.php
complete_order.php
config.php
customer_bonuses.php
customer_offers.php
func.php
html_catalog.php
init.php
offers.php
place_order_extra.php
product_offers.php
register_customer.php
search_results_calculate.php

provider/…
offers.php

skin1_original/images/…
offer_thumb.gif
offerbox_arrow.gif

skin1_original/mail/…
special_offers_order_bonuses.tpl

skin1_original/mail/html/…
special_offers_order_bonuses.tpl

skin1_original/modules/Special_Offers/…
bonus_names.tpl
common.tpl
condition_names.tpl
menu_cart.tpl
menu_provider.tpl
menu_special.tpl
offer_bonuses.tpl
offer_conditions.tpl
offer_details.tpl
offer_languages.tpl
offer_nav.tpl
offer_status.tpl
offers.tpl
order_bonuses.tpl
order_extra_data.tpl
show_status.tpl
wizard_step.tpl
wizard_step_w_list.tpl
```

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```
skin1_original/modules/Special_Offers/customer/…
bonuses.tpl
bonuses_points2gc.tpl
bonuses_view.tpl
cart_bonuses.tpl
cart_checkout_buttons.tpl
cart_free.tpl
cart_offers.tpl
cart_price_special.tpl
category_offers_short_list.tpl
checkout_free_products.tpl
new_offers_message.tpl
new_offers_short_list.tpl
offers.tpl
offers_list.tpl
product_offer_thumb.tpl
product_offers_short_list.tpl
product_special_price.tpl
register_bonuses.tpl

skin1_original/modules/Special_Offers/edit/…
bonus_discount.tpl
bonus_membership.tpl
bonus_noprice.tpl
bonus_points.tpl
bonus_shipping.tpl
condition_membership.tpl
condition_points.tpl
condition_set.tpl
condition_total.tpl
condition_zone.tpl
product_n_category.tpl

skin1_original/modules/Special_Offers/view/…
bonus_discount.tpl
bonus_membership.tpl
bonus_noprice.tpl
bonus_points.tpl
bonus_shipping.tpl
condition_membership.tpl
condition_points.tpl
condition_set.tpl
condition_total.tpl
condition_zone.tpl
product_n_category.tpl

sql/…
x-offers.sql
x-offers_lng_US.sql
```

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X-SpecialOffers add-on module for X-Cart 4.1.11. User manual.

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