



SILVERWAREPOS

PROMO CODES

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PURPOSE

The purpose of this document is to guide you through how to setup and configure Promotions. Promotions allow an user to use a promo code during an order to get an applicable discount.

PREREQUISITIES

- The site needs to be enabled and setup for Corporate CRM
- Minimum Online Ordering v73

STEP 1: Enable Promo Codes

1. Go to setup.silverwarepos.com
2. Select the Client.
3. Go to Online Ordering 2.0
4. Scroll down and select 'Yes' to Enable Promo Codes

Store Settings

Changing following settings do not require communicating with the store.

Disable order email to user: <input type="text" value="No"/>	Enable menu item counts: <input type="text" value="Yes"/>
Disable order received email to store: <input type="text" value="No"/>	Support subgroups (integration only): <input type="text" value="Yes"/>
Wait Time (in min) for order failed email to store: <input type="text" value="5"/>	Support new future ordering (Needs to be setup in Store Config 2.0 first): <input type="text" value="Yes"/>
Print Guest Check: (Prints guest check if not specified.) <input type="text" value="Yes"/>	Use Item's Scheduled Time On Checkout: <input type="text" value="Yes"/>
Enable Promo Codes: <input type="text" value="Yes"/>	

STEP 2: Creating the Discount

ITEM LEVEL PROMO DISCOUNT

1. Within Avrio, go to Manager Options. (or create using Corp Menu)
2. Choose the Configuration tab
3. Choose Discount Reasons
4. Create a new Discount.
5. Ensure the Discount Name and Discount Group Code are the SAME.

Details

Name: 2BUCKS

Type: Value Off

Loyalty Type: None

Open Amount:

Amount: \$2.00

Interface ID: None

Discount Group Code: 2BUCKS

6. You can set the requirements on the discount reason for major class, minor class & menu items which will be obeyed by online ordering.

Discount Setup

Discounts

BEVERAGE RECOVERY
EMPLOYEE DISCOUNT
F&B COMP
HOSPITALITY
MANAGER MEAL
2BUCKS
OPEN \$
OPEN %
OWNER COMP
SERVICE RECOVERY
Staff
test
VIP

Active

New Remove

Details

Name: 2BUCKS

Type: Value Off

Loyalty Type: None

Open Amount:

Amount: \$2.00

Interface ID: None

Discount Group Code: 2BUCKS

Visible:

Active:

Role To Authorize: Server

Role To Modify: Server

Allow Negative:

Affect Tax:

Apply To All Items:

Security Group:

Points To Redeem:

Prompt For Reason:

Payment Method: None

Major Classes

Affects All Classes

Add Remove

Minor Classes

Affects All Classes

Add Remove

Menu Items

Affects All Items

Add Remove

Cost Centers

Affects All Cost Centers

Add Remove

OK Cancel

CHECK LEVEL DISCOUNT

1. Go to Manager Options
2. Choose the Configuration Tab
3. Choose Menu
4. Create a menu item called Discount.
 - a. Ensure this item is OPEN PRICE
5. Save your changes
6. Go back into Manager Options
7. Choose the Configuration Tab
8. Choose System Settings
9. Scroll down to the Misc section.
10. Set the Discount Menu Item to the one you created.

The screenshot shows the 'Modify System Settings' dialog box with the following sections and fields:

- General:** Unavailable button: 50.00%, Scheduled Interactive Button: 30.00%
- Miscellaneous:**
 - Allow Multiple Discounts:
 - Price Level Rule: Recall Time
 - Pay Period Start: 1/2/2000
 - Reporting Overtime (Week): 2640 Minutes
 - Reporting Overtime (Day): 9999 Minutes
 - Ask C/C Guest Count:
 - Ask Bar Guest Count:
 - Bar Tab Age Check: 0
 - Fire Minor Class: None
 - Discount Menu Item: Discount** (highlighted in red)
 - Theme: My Theme
 - Refund Button Reason: Refund
 - Allow Teams:
 - Max Image Pixel Length: 3840
- Business Options:**
 - Daily Expense: 0
 - Daily Labour Expense: 0
 - Daily Average Business Hours Open: 12
- Quick Books:**
 - Company Name: SilverwarePOS
 - Tax Agency: Receiver General
- Tip-In/Tip-Out Requires Manager:** Require Manager Tip Rate: 0%
- Online Ordering:**
 - Item Notes Menu Item: None
 - Online Ordering User: None
- Future Ordering:**
 - Future Ordering User: None
- Hold & Fire:**
 - Enabled:
 - Mode: Menu & Course
 - Keep Records:
 - Check Interval: 30
 - Auto Hold On Send:
- Printer Groups:**
 - Bar
 - Bar2
 - Barista
 - do not use
 - Kitchen (Main)
 - not used
 - Name:
 - Ignore Separate Chits By Guest:
 - Print Separate Chits By Item:
 - InterfacelD:

Buttons: OK, Cancel

11. Press OK.
12. Go to Manager Options.
13. Choose the Configuration tab
14. Choose Discount Reasons

15. Create a new Discount.

- a. Give the Discount a NAME
- b. TYPE: Must be Value Off
- c. Discount Group Code: SAME AS THE DISCOUNT NAME
- d. Apply to All Items: Must be Checked

Details

Name: 2BUCKS

Type: Value Off

Loyalty Type: None

Open Amount:

Amount: \$2.00

Interface ID: None

Discount Group Code: 2BUCKS

Visible:

Active:

Role To Authorize: Server

Role To Modify: Owner

Allow Negative:

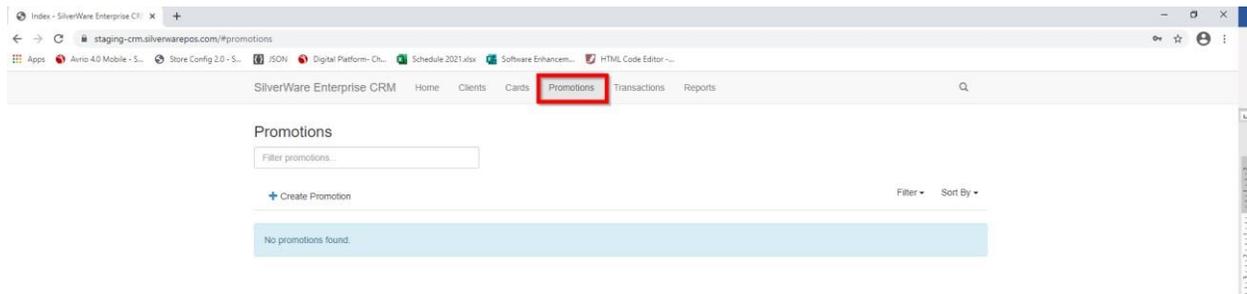
Affect Tax:

Apply To All Items:

STEP 3: Allowing the Promo Code to be used in Online Ordering

Note that you only need to add the Promo once to the CRM site using the Discount Group Code method. If the discount exists at the store level with the same discount group code, the promo will apply on their Online Ordering site.

1. Ensure the client is added to the CRM chain.
2. Go to the CRM website
 - a. crm.silverwarepos.com
3. Select the Promotions Tab



4. Select Create Promotion
5. Set Promotion Details
 - a. Merchant = Select the Merchant associated within that chain (IE. The store)
 - b. Promo Code = Set the Promo Code Name. Same name as the discount reason
 - c. Discount Reason ID= Select, from the drop down, the discount reason to be used for the promo
 - d. Discount Group Code = Set the discount group code if the promo will be used chain wide
 - e. Valid From/To= Set the Valid From and Valid To dates
 - f. Days: **Ensure to add each day the promo code is valid. If you do not select any days, the promo code will not work**
 - g. Public = Set to private for now
 - h. Active = is the promo active or not. Set to Active
6. Set Promotion Options
 - a. Single Use = currently this is not working as intended, **leave as NO**
 - b. Allow Other Promotions = can this promo be used with other promos?
 - c. Discount Mode = promo applies to items by lowest – highest or highest – lowest
 - d. Items to Discount = set the number of items the promo applies to. IE 0,1, 2, 3, etc.
 - i. **If it is a check level discount, leave this Empty**
 - e. Minimum Amount (\$) = set the minimum cart dollar amount before the promo will be valid to use

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- f. Minimum Items = set the minimum number of items in the cart before the promo will be valid to use
 - i. **If it is a check level discount, leave this Empty**
- g. Must Purchase Items = save the current promo code. Then search for the menu item(s) that are required to be on the order for the promo code to be valid

Promo Details		Promo Criteria	
Merchant:	Product Lab	Single Use	No
Display Name:	Staff Discount	Allow Other Promos :	No
Promo Code:	STAFF25	Discount Mode:	Discount Least Priced Item
Long Description:	Can be used with beverages only	Items To Discount:	2
Discount Reason:	Staff 25% <small>Merchant needs to be selected.</small>	Minimum Amount (\$):	Empty
Discount Group Code:	Empty	Minimum Items:	Empty
Valid From:	2023-01-23	Must Purchase Items:	Select Item <small>Merchant needs to be selected.</small>
Days:	Sunday Monday Tuesday Wednesday Thursday Friday Saturday		
Valid To:	2025-01-24		
Public:	Yes		
Active:	Yes		
Date Created:	23 Jan 2023 1:10 PM		
Last Modified:	23 Jan 2023 1:10 PM		

7. When all the information is filled in, choose Save Changes

STEP 4: TESTING

1. Go to the clients Online Ordering Website and place an Order
2. Choose Checkout
3. Enter the Promo Code and choose Apply

🕒 — 📋 — 🛒

👍 Please choose your tip

11% \$3.41	16% \$4.96	21% \$6.50	Other
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🔑 Enter Promo Code

Promo Code

Apply

👛 How would you like to pay?

Credit Card or Visa Debit

Cash

4. The discount will now be applied

🕒 — 📋 — 🛒

👍 Please choose your tip

11% \$1.75	16% \$2.55	21% \$3.35	Other
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Do you want to use a badge?

No Yes

🔑 Enter Promo Code

FREEAPP

Apply

Promo code discount applied.

🛒 My Cart Remove Discounts 🗑

1x Shrimp Skewer	\$7.00
<i>Free Appetizer</i>	(\$7.00)
1x Mozzarella Sticks	\$10.00
<i>Free Appetizer</i>	(\$10.00)
1x Crab Cakes	\$10.50
1x 4 Egg Breakfast	\$7.50
<i>Sunny Side Up</i>	
<i>Breakfast Sides (Skipped)</i>	
<i>Bagel</i>	
VAT	\$2.07
Total	\$18.00
Tip	\$2.55
Balance Remaining	\$20.55

Extra Notes:

Promotion discounts will be removed, and user needs to reapply promotion code if:

1. Quantity of items in cart is changed or item is deleted.
2. Navigated to menu page.

INDEX A: Example Promotion Types

Use code get Free Delivery

Currently, we can apply check level discount with the same amount as the gratuity used for delivery fee. Gratuity must be value based. Does not handle different delivery zones.

1. Create check level discount will the value of delivery free.
2. Create promotion with check level discount associated.

Spend \$20 Save \$5 (SAVE5)

1. Create a check level discount with \$5 value.
2. Set the discount group code on the discount if using for chain level.
3. Create promotion using above discount.
4. Set 20 on "MinimumAmount" from Promotion Options in the CRM website

Buy 1 Get 1 Free (BUY1GET1)

This promotion will give 100% discount on second least priced item in the order.

1. Create 100% off discount. This should not be check level discount.
2. Set the discount group code on the discount if using for chain level.
3. Create promotion using above discount.
4. Set following properties in promotion options in the CRM Website:
 - a. "DiscountMode": Discount Least Priced Item,
 - b. "ItemsToDiscount": 1,
 - c. "MinimumItems": 2

Spend \$50 Save \$10 (SAVE10)

1. Create a check level discount with \$10 value.
2. Set the discount group code on the discount if using for chain level.
3. Create promotion using above discount.
4. Set 50 on "MinimumAmount" property in promotion options in the CRM Website

Spend \$30 save 10% off entire order

1. Create a 10% off discount. This should not be a check level discount.
2. Set the discount group code on the discount if using for chain level.
3. Create promotion using above discount.
5. Set 30 on "MinimumAmount" property in promotion options in the CRM Website

Use code get a Free cookie

1. Create a 100% off discount reason. The discount reason must only apply to cookie menu item. This should not be a check level discount.
2. Set the discount group code on the discount if using for chain level.
3. Create promotion using above discount.
4. Set following properties in the CRM Website under Promotion Options"
 - a. DiscountMode": Least,
 - b. ItemsToDiscount": 1

Cookie must be ordered before applying promotion. Promotion does not add cookie.

Use code and get 15% off

1. Create a 15% off discount reason. Cannot be check level discount.
2. Set the discount group code on the discount if using for chain level.
3. Create promotion using above discount.

Buy a chicken souvlaki pita and get baklava for free

1. Create a 100% off discount reason. The discount reason must only apply to baklava menu item. This should not be a check level discount.
2. Set the discount group code on the discount if using for chain level.
3. Create promotion using above discount.
4. Set following properties. MustPurchaseItemIDs must contain menu item Id of Sauvlaki pita.
 - a. "DiscountMode": least,
 - b. "ItemsToDiscount": 1,
 - c. "MustPurchaseItemIDs": 3927f3c7-c85e-455f-9721-3735d8266c10

INDEX B: PROMOTION TABLE

Column	Type	Value
ID	INT	Do not enter any value. This is auto generated.
CompanyID	Int	Required. Set companyID of the chain from companies table.
MerchantID	Int	Optional for chain level promotion code. Set merchantID of the merchant from merchants table.
DateCreatedUtc	DateTime	Do not enter. It will be auto generated. The value will be UTC date.
CreatedByEmail	String	Enter your silverware email address.
DateModifiedUTC	DateTime	Do not enter. This will be updated once the UI is built.
ModifiedByEmail	String	Do not enter. Enter if you are modifying promotion code. But not required.
ValidFromUTC	DateTime	Required. Promotion start date.
ValidToUTC	DateTime	Required. Promotion expiry date.
Active	Number	Set 1 for active, 0 for inactive.
PromoCode	String (50)	Promotion code
DiscountReasonID	String	Lowercase discount reason ID from Avrio database. This is required for merchant level promotion. Do not enter for chain level promotion.
DiscountGroupCode	String (50)	Discount Group code of discount reason to use for promotion. Can be used for chain level or store level promotions.
DateDeletedUTC	DateTime	Set this to mark the promotion as deleted. Should be a UTC date.
DeletedByEmail	String	Silverware email address of person marking it as deleted.

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Options	String	<p>Optional. If specified, must be a valid JSON. This defines additional properties for the promotion.</p> <pre>{ "SingleUse": false, "AllowOtherPromotions": true, "DiscountMode": 1, "ItemsToDiscount": 1, "MinimumAmount": null, "MinimumItems": 2, "FreeDelivery": false, "MustPurchaseItemIds": ["3927f3c7c85e-455f-9721- 3735d8266c10"] }</pre> <p>See Promotion Options below for more details.</p>
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