

Creating Price Rules and Vouchers

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Creating Price Rules and Vouchers

Vouchers play an important role in your daily relationships with your customers. Typically, customers like two things when shopping:

- Feeling special, unique.
- Getting good prices.

Both can be achieved with personalized discounts, and this is precisely where vouchers come into play – or more precisely, price rules, which is a new feature in PrestaShop 1.5.

"Price rules" can take two forms:

- **Cart rules.** These are actually the successors to vouchers, as they were known in previous versions of PrestaShop. Basically, it enables you to create per-customer voucher codes, but also much more.
- **Catalog price rules.** Enables you to assign price reductions by category, manufacturer, supplier, attribute or feature. For instance, you can set a rule that would say that for Spanish customers belonging to the "Good clients" group would get 10% off on your Electronics category and all Sony products for the first week of July.

Cart Rules

The "Cart rules" page gives you access to an advanced tool that succeeds and builds upon the voucher system from PrestaShop 1.4. Seasoned users of PrestaShop will not be surprised with the features that were added, but will have to adapt to the new name: when this guide mentions vouchers, we are actually talking about cart rules – which, in themselves, are quite different to credit slips.

Differences between a credit slip, a voucher and a cart rule

A credit slip is first and foremost a written proof that a product has been returned. Most of the time, the user can use it as a voucher.

A voucher is a discount code which does not have to be tied to a merchandise return or a refund, and which can take many more forms than a simple credit slip:

- A discount on an order (percentage).
- A discount on an order (amount).
- Free shipping.

You can apply a voucher to all customers, or a group of customers, or a single customer; you can set its expiration date.

A cart rule is basically an advanced version of a voucher: in addition to what a voucher could do in PrestaShop 1.4, the cart rules system introduced in PrestaShop 1.5 enables you to:

- Name the discount.
- Allow the customer to use only a portion of the discount.
- Assign priorities between cart rules.
- Set the compatibility between cart rules.
- Have the discount only work with some carriers.
- Have the discount only work with a selection of products and/or categories and/or manufacturers and/or suppliers and/or attributes... or all of these at the same time if necessary.
- Have the discount be applicable for free shipping and/or a discount on an order and/or a free gift... or all of these at the same time if necessary!

In this user guide, "cart rule" and "voucher" are synonymous and interchangeable.

The "Cart rules" page lists the currently existing cart rules, which you can enable or disable by clicking on the icons in the "Status" column.

ID	Code	Priority	Code	Quantity	Until	Status	Actions
No items found							


Creating a New Cart Rule

A voucher can be created automatically after a product return, but you can create a new voucher at any time manually, and be very specific about its properties.

The creation form has three tabs, enabling you to precisely build new rules and vouchers.

Information Tab

The first tab, "Information", contains the rule's identifiers and main settings.

Information	Cart-rule information
Conditions	<p>Name <input type="text"/>  <i>This will be displayed in the cart summary, as well as on the invoice.</i></p> <p>Description <input type="text"/> <i>For your eyes only. This will never be displayed to the customer.</i></p> <p>Code <input type="text"/> <input type="button" value="(Click to generate random code)"/> <i>Caution! The rule will automatically be applied if you leave this field blank.</i></p> <p>Highlight <input type="radio"/> <input checked="" type="radio"/> <input type="radio"/> <input checked="" type="radio"/> <i>If the voucher is not yet in the cart, it will be displayed in the cart summary.</i></p> <p>Partial use <input checked="" type="radio"/> <input type="radio"/> <input type="radio"/> <input checked="" type="radio"/> <i>Only applicable if the voucher value is greater than the cart total. If you do not allow partial use, the voucher value will be lowered to the total order amount. If you allow partial use, however, a new voucher will be created with the remainder.</i></p> <p>Priority <input type="text" value="1"/> <i>Cart rules are applied by priority. A cart rule with a priority of "1" will be processed before a cart rule with a priority of "2".</i></p> <p>Status <input checked="" type="radio"/> <input type="radio"/> <input type="radio"/> <input checked="" type="radio"/></p>
Actions	

- **Name.** The name is public, so you should keep it casual.
- **Description.** The description is not public. It helps your shop employees understand why the rule was created.
- **Code.** Give your rule a unique code. You can either create one manually (and therefore use readable words, like 1VOUCH4JOE), or have PrestaShop generate one unique string by clicking the "Click to generate random code" button. Of course, you can also use any other string generator (such as <http://www.random.org/strings/>).
Note that if no code is set, the rule will apply to any customer fitting the other conditions:
 - If there is a code, then customer have to enter it during the ordering process.
 - If there is no code, then the rule is automatically applied to benefiting customers.
- **Highlight.** If enabled, PrestaShop will let the user know that a voucher corresponding to the items in the cart is available and can be added.
- **Partial use.** If disabled, the rule/voucher can only be used once, even if it is not completely used. If enabled, a new voucher is created when the current one is not completely used.
- **Priority.** If a customer (or group of customers) is eligible for more than one voucher, or if more than one voucher can be applied to an order, then PrestaShop applies said voucher one by one in the alphanumerical order. You can change that order by placing a lower priority to you voucher. By default, they all have a priority of 1. If you set it to a higher number, the voucher will be applied after vouchers with a lower number.
- **Status.** You can disable and enable a rule whenever you feel is necessary.

Conditions Tab

The second tab, "Conditions", contains a large set of possibilities, enabling you to precisely target who should be able to benefit from this rule.

Information	Cart rule conditions
Conditions	<p>Limit to a single customer <input type="text"/></p> <p><i>Optional, the cart rule will be available for everyone if you leave this field blank.</i></p> <p>Validity from <input type="text" value="2012-08-06 10:00:00"/> to <input type="text" value="2012-09-06 10:00:00"/></p> <p><i>Default period is one month.</i></p> <p>Minimum amount <input type="text" value="0"/> <input type="text" value="EUR"/> <input type="text" value="Tax excluded"/> <input type="text" value="Shipping excluded"/></p> <p><i>You can choose a minimum amount for the cart either with or without the taxes, and with or without shipping.</i></p> <p>Total available <input type="text" value="1"/></p> <p><i>The cart rule will be applied to the first X customers only.</i></p> <p>Total available for each user <input type="text" value="1"/></p> <p><i>A customer will only be able to use the cart rule X time(s).</i></p> <p> <input type="checkbox"/> Carrier selection <input type="checkbox"/> Customer group selection <input type="checkbox"/> Product selection </p>
Actions	

- **Limit to a single customer.** This is where you indicate that the voucher you are creating is for one customer only. For instance, if you had a delivery delay and you want to make a gesture of goodwill, you can create a voucher for this customer that only he or she can access. To quickly find the customer, type in the first few letters of their first name, last name or e-mail in the text field. If empty, PrestaShop will understand that any customer can use it... unless you have added a customer group as a further condition (see "Customer group selection" check-box below).
- **Validity.** The default validity is one month, but you can reduce that to one week or even one day.
- **Minimum amount.** The minimum order amount from which the voucher is applicable. Your voucher will only be applicable if the customer's order is above the given amount. You can choose if that amount should include taxes and/or shipping costs.
- **Total available.** Set a quantity of available vouchers: either "1" if it is intended for a single customer, or any number if the voucher is for whoever uses one first.
- **Total available for each user.** You can set the number of times a voucher can be used for each user. That number must be at least equal to the quantity of available vouchers above ("Total available" field).
 - If that number is inferior to the total quantity of available vouchers, then one single customer will not be able to use all of them.
 - Keeping it to "1" makes sure that each of your customers can only use the voucher once. In that case, make sure the voucher applies to a group rather than a customer...

The check-boxes at the bottom of the section are very important, as they help you further filter to what or to whom the rule is to be applied.

- **Carrier selection.** You can make it so that the customer will have a discount if he or she chooses a specific carrier for the package delivery.
- **Customer group selection.** This is very useful. Thanks to PrestaShop's group creation tool, you can create discount that apply to a range of users, and build other conditions on top of that discount thanks to the cart rule creation tool.
- **Compatibility with other cart rules.** By default, an order can benefit from any number of cart rules. With this option, you can tell PrestaShop that this rule cannot be combined with a selection of other rules. This option only appears if you have more than one cart rule.
- **Product selection.** Another very useful tool, which enables to create automatic vouchers for cart which contain specific products. The tool is explained in more detail below.
- **Shop selection.** By default, a cart rule applies to all your stores. With this option, you can make it so that rule only applies to a selection of your stores.

The "Product selection" option brings a whole new form, and enables you to create not only per-product vouchers, by also per-categories, per-manufacturers, per-suppliers and even per-attribute. As a bonus, you can combine all these in order to specify your customer target as much as possible.

Carrier selection
 Customer group selection
 Product selection

The cart must contain at least product(s) matching the following rules:

Add a rule concerning

[Products] The product(s) are matching on of these

Product selection

For instance, you can create automatic vouchers for your customer in the form "Buy at least 3 Apple product, get free shipping!"

This is really a tool within the cart rule too, and its configuration is quite specific. You can add as many product selections as needed, following this path:

1. Click the "Product selection" link to add a new section.
2. Indicate the number of products needed for the discount to activate.
3. Add at least one rule, of the type you want: products, attributes, categories, manufacturers, suppliers. You can add as many rules per product selection as you want, even one for each type if necessary.
4. Clicking the "OK" adds a new line in the selection. For each type, you must give details on the content the rule applies to. Click the "Choose" link and a window opens, listing the content available for this type (products, categories...). Move the content from the left panel to the right one by clicking on the "Add" button, and close the window by clicking on the "X" at the top right. If only one content is selected, the content field will give its name; otherwise, it will indicate the number of selected content.

You can add as many rules within a selection as necessary. These rules are cumulative: either they all apply, or the discount is not granted.

Product selections are independent: you can add as many as needed, and they will not influence each other. This enables you to create a whole range of products to which the cart rule will apply.

Actions Tab

The third and last tab, "Actions", is where you choose what the discount actually consists of.

Information	Cart rule actions
Conditions	
Actions	<p>Free shipping <input type="radio"/> <input checked="" type="radio"/> <input type="radio"/> <input checked="" type="radio"/></p> <p>Apply a discount <input type="radio"/> <input checked="" type="radio"/> Percent (%) <input checked="" type="radio"/> Amount <input type="radio"/> None</p> <p>Amount <input type="text" value="0"/> <input type="text" value="EUR"/> <input type="text" value="Tax excluded"/></p> <p>Apply discount to <input type="radio"/> Order (without shipping) <input checked="" type="radio"/> Specific product</p> <p>Product <input type="text"/></p> <p>Send a free gift <input type="radio"/> <input checked="" type="radio"/> <input type="radio"/> <input checked="" type="radio"/></p>

- **Free shipping.** The rule treats benefiting customers to free shipping.
- **Apply a discount.**
 - **Percent (%).** The rule applies to a percentage of the order total. For instance, let's say the order is valued at \$200 before taxes. The rule has a value of 15%. Customer who benefit from this rule will only have to pay \$170 (before taxes and shipping costs).
 - **Amount.** The rule applies a monetary discount on the order total. For instance, let's say the order is valued at \$200 before taxes. The discount offers \$20 off the purchase. Customer who benefit from this rule will only pay \$80 before (before shipping costs). You can choose whether taxes are applied to the discount or not.

- **None.** The rule does not offer any discount on the order. Choosing this option makes the next section, "Apply discount to", disappear.
- **Apply discount to.**
 - **Order (without shipping).** The discount applies to the whole order.
 - **Specific product.** You can choose to which product the discount should apply: type the first letters of the product, and choose in the list of matching names.
 - **Cheapest product.** Only available for the "Percent (%)" option.
 - **Selected product(s).** The customer can choose on which products the discount should be applied. Only available for the "Percent (%)" option.
- **Send a free gift.** You can choose to offer a gift for some conditions (and skip the discount altogether). A field appears: type the first letters of the product, and choose in the list of matching names.

Once everything has been saved, you can send your voucher code to your customers, or let the system handle the cart rules automatically, depending on your settings.

Your voucher will appear in the "Cart Rules" page, under the "Price rules" menu. You can delete or edit it at any time. If the voucher was set to a specific group or customer, then it will appear in the Front-Office, in the customer's "Vouchers" section of his account as well as in the cart (if you chose to), where they can choose which one to apply to their order.

🏠 > My account > My vouchers

My vouchers

CODE	DESCRIPTION	QUANTITY	VALUE*	MINIMUM	CUMULATIVE	EXPIRATION DATE
KKOCTSKT	10% off on all product until August 20th!	1	10.00%	None	✔ Yes	09/6/2012

Cart rules that are set to apply to all customers do not appear in the customer's "My vouchers" page: he or she has to know about them in order to use them. It is up to you to let them know about these public discounts.

In order to apply the cart rule, the customer needs to visit his cart and enter the voucher in the "Vouchers" field and click "Add". The customer will not be able to apply the voucher if the check-out is already validated.

Total tax:	91,54 €
Vouchers <input type="text"/>	TOTAL:
<input type="button" value="OK"/>	558,59 €

Once applied, the cart summary displays the voucher's impact on the order's amount.

	Earphones for iPod and iPhone					
10% off on all product until August 20th!		-61,80 €	1	-61,80 €	<input type="button" value="DELETE"/>	
Total products (tax incl.):				618,00 €		
Total products (tax excl.):				679,80 €		

Catalog price rules

Catalog price rules are a new feature from PrestaShop 1.5, which enables you to assign price reductions by category, manufacturer, supplier, attribute or feature. As its name implies, this type of rules applies to a range of products; it cannot be used for a single product. If you need a discount applied to a single product, you must create a cart rule instead or create a specific price (in the "Price" page of the product's edition page).

For instance, you can set a rule that would say that for Spanish customers belonging to the "Good clients" group would get 10% off on your Electronics category and all Sony products for the first week of July.

The "Catalog price rules" page lists the currently existing rules, which you can edit or delete by clicking on the icons in the "Status" column. If you need to disable a rule, simply change its end date to the day before.

Creating a New Catalog Price Rule

The creation form page has two sections, enabling you to precisely build new rules.

Specific price rules

The first form is easy to understand.

Specific price rules

Name: *

Currency: ▼

Country: ▼

Group: ▼

From quantity: *

Price (tax excl.): €

Leave base price

From:

To:

Reduction type: ▼

Reduction: *

This is where you set who should benefit from the rule, what the discount should be, and other details.

- **Name.** The name is public, so you should keep it casual.
- **Shop.** The rule applies to customers who buy through a specific shop. Only available if you have at least two shops.
- **Currency.** The rule applies to customers who set to pay with a specific currency.
- **Country.** The rule applies to customers from a specific country.
- **Group.** The rule applies to customers who belong to a specific customer group.
- **From quantity.** The rule applies the order has at least a specific number of matching products.
- **Price (tax excl.).** The new price for the product. Here you can set the public price of the product that matches the rules that you are putting in place. By default, the rule applies to the base price.
- **From and To.** The rule applies in this time frame.
- **Reduction type.** The discount can either be an amount of money, or a percentage of the order total.
- **Reduction.** The value of the reduction. Depending on the "Reduction type" above, putting "10.0" in the field can either mean "\$10 off" (depending on the default currency) or "10% off".

You can of course combine all of these rules.

Conditions

The "Conditions" section is where you set the products to which the category price rule applies.

Condition group 1


Type	Value
Attribute	Disk space: 4GB
Manufacturer	Apple Computer, Inc

OR


Condition group 2


Type	Value
Attribute	Color: Pink
Attribute	Color: Blue
Manufacturer	Apple Computer, Inc


OR


 Add a new condition group


Conditions

Category: iPods  Add condition

Manufacturer: Apple Computer, Inc  Add condition

Supplier: AppleStore  Add condition

Attributes: Color  Add condition

Features: Height  Add condition

Conditions are built around condition groups, meaning that your data from the "Specific price rule" section above can be applied to many different ranges of products.

The default condition group is empty. You can add conditions to it using the drop-down menus in the lower part of the section:

- Choose a category or any other type of selection, and then click on the "Add condition" button.
- The condition will appear in the condition group. You can put many conditions in a condition group.
- Once a group is completed and you want to create a new condition group, click on the "Add new condition group". A new group will then appear, which you can fill in the same way.

By default, new conditions are added to the condition group that was created last. If you need to add conditions to a previous group, click on that group to highlight it, and then add your conditions.

You cannot currently remove a condition from a condition group.









You cannot currently delete a condition group.

Marketing

New in v1.5.4.

This page gathers in one place some of the most marketing-wise important modules available in your installation of PrestaShop. It serves as a shortcut to certain categories of modules from the "Modules" page.

Modules list

 AddShoppers Social Commerce Platform... 1.1.2 NOT INSTALLED <i>FREE - Adds sharing buttons from Facebook, Twitter, Pinterest, and many more to increase sales from...</i> <input type="button" value="Install"/>	 Customer referral program 1.5.1 NOT INSTALLED <i>Integrate a referral program system into your shop.</i> <input type="button" value="Install"/> <input type="button" value="Valider"/>	 Shopping Flux (Addons) 2.0.4 NOT INSTALLED <i>Exportez vos produits vers plus de 100 comparateurs de prix et places de marché</i> <input type="button" value="Install"/>
 Customer loyalty and rewards 1.8 NOT INSTALLED <i>Provide a loyalty program to your customers.</i> <input type="button" value="Install"/> <input type="button" value="Valider"/>	 Fia-Net Sceau de Confiance (Addons) 1.0 NOT INSTALLED <i>Turn your visitors into buyers by creating confidence in your site</i> <input type="button" value="Install"/>	 TWENGA Ready To Sell (Addons) 1.8.6 NOT INSTALLED <i>Export your products to Twenga Shopping Search Engine and get new online buyers immediately</i> <input type="button" value="Install"/>

The modules in this page come from the "Advertising and Marketing" and "Smart Shopping" sections in the "Modules" page.

You can install modules directly from this page. When you click the "install" button (or select "Install" in the drop-down list and click "Validate"), the module is installed and you are taken to the "Modules" page, where you can open the module's configuration page by clicking on its "Configure" link. You can also return to the "Marketing" page in order to open the configuration page, or delete, disable, reset or uninstall the module, depending on its status.

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