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WEBMASTER



**PROMO
MANAGER**



Promo Manager Walk Through

Getting Started.....	3
Settings.....	4
Yahoo Store Editor Settings.....	6
Shipping & Tax.....	9
Order Manager Set-up.....	13
Summary Page.....	14
Step 1: Type of Promotion or Condition.....	16
Step 2: By Cart Contents.....	18
Step 2: By Cart Value.....	19
Step 2: By Date, Day of Week, and Time.....	20
Step 2: By Shipping Address.....	21
Step 2: By Promo Code.....	22
Step 3: Rewards.....	23
Step 4: Exceptions to Rewards.....	25
Reporting.....	27





Getting Started

After the Promo Manager is installed, we will send you an email containing two sets of login info. One is for the Promo Manager, and the other is for the Promo Manager's shipping and Tax system.

(If you are using our Advanced Shipping Manager, then you will not need to use the Promo Manager's shipping and tax system.)

Before using the Promo Manager's shipping and tax system, you should make sure that all the settings for your shipping and tax are correctly set. Once these settings are complete, you will only need to access the Promo Manager's shipping and tax system when you want to make changes to your shipping and tax rates.

To begin creating promotions, login to the Promo Manager by either using the link that we sent you after installation, or by going to <http://www.promomanager.com/login.php>. Once logged in, you will have the ability to control your Promo Manager's settings and to create new promotions. Follow the step by step help shown along the right side of the page or use this document. Both will provide you with the needed information to help you get your promotions running.

If you require any assistance, please feel free to contact us.





Settings

Promo Manager Settings:

On this page, you are able to set your password, email address, time zone, and how the Promo Manager should handle specific scenarios.

Time Zone:

Please note that our servers automatically compensate for daylight savings and standard times.

Set the time zone that you want the Promo Manager to use as a reference for time-based promotions. The time zone that you set does not have to be your time zone. For example, if you set Eastern time and then create a promotion for 2 to 3 PM, the promotion will be between 2 and 3 PM Eastern Time.

When Multiple Promotions Qualify:

In some cases, your customers may qualify for more than one of your active promotions. This setting controls how the Promo Manager handles these situations.

Single Promotion with Highest Value: Choose this if you want the Promo Manager to give your customers ONLY the highest valued promotion that they qualify for.

Combination of Promotions with Highest Value: Choose this option if you want your customer to get all the promotions he or she qualifies for. Total discount can differ depending on the order in which the promotions are calculated. The Promo Manager will test every order of calculating multiple promotions and then give your customer the greatest possible discount.

(Continued...)





Settings (Continued)

When Reward is an Item:

Instruct the Promo Manager how to handle promotions that have an item as a reward. (In this description, the reward pool refers to items that qualify to be a reward within the customer's cart.)

For instance, if your store has a buy 3, get 1 free promotion, and your customer adds 5 items, then the first three, the most expensive items, are the condition (or the "Buy 3") and the last two items are the reward pool. In this setting, specify whether you want to give the most expensive or least expensive item in the reward pool.

Example Promotion: Buy 2 Get 1 Free

Customer's Cart: Sticker 1- \$10, Sticker 2- \$8, Sticker 3-\$6, Sticker 4- \$5

This customer qualifies for multiple free items. This setting allows you to choose which items he will get for free. The two more expensive stickers will be used for the "Buy 2" condition. With the "**Cheapest Item**" option, the customer will get a \$5 discount, the value of the cheapest item in the reward pool. With the "**Next Expensive**" option, the customer will get the \$6 discount, the value of the more expensive item in the reward pool.





Yahoo Store Editor Settings

Promo Manager Variables:

In your “Variables” section, you will find a new variable called “Promo-Variables.” In this variable, you should list the 5 custom variables that you want to use to determine the pools of items need for customers to qualify for promotions, as well as the pools of items used for rewards and exceptions.

By default, when we install the Promo Manager, we will create 5 custom variables on each of your store’s product pages that you may use. You may also elect to use your stores pre-existing variables instead of the 5 custom variables that we created.

The 5 custom variables that we create when installing the Promo Manager are called:

Promo-var-1

Promo-var-2

Promo-var-3

Promo-var-4

Promo-var-5

How to correctly use variables associated with the Promo Manager:

As mentioned above, you will find a variable called “promo-variables.” This contains a list of 5 variables that you can choose to use with the Promo Manager. The best way to explain the use of this is via example:

You want to create a “Buy 2 shirts, get 1 free” promotion. You need to identify to the Promo Manager, which items are shirts. You could use “promo-var-1” for this. Every item that is a shirt, you would enter a common value for in “promo-var-1.” So in this case, you could enter the word “shirts.” By doing so, the Promo Manager will look for any item in the store who’s “promo-var-1” variable has a value of “shirts”.

(Continued...)





Yahoo Store Editor Settings (Continued)

If you already have custom variables in your store, such as “manufacturer,” “style,” or anything else, you could use any combination of those, instead of the 5 variables that we added. Just go to the “variables” and change the variables names in the “promo-variables” to what ever you prefer to use. You can change these at any time. Note that you can have a maximum of 5 variables set. Each one should be on a new line. Any additional variables after the 5th, will be ignored by the Promo Manager.

Keep in mind that in addition to the 5 variables that you can set, you also have the ability to use the following built in Yahoo Store variables that will always be available regardless of what you set in “promo-variables”:

ID

NAME

CODE

SELLING PRICE (uses current selling price for item)

If you’re using a custom variable with a drop down list of Yes and No, Yahoo exports Yes as “T” and No is empty. In this case, you will need to set your promotion rule to “If promo-variable-[1,2,3,4, or 5] Equals T [or Not-equals T].”

(Continued...)





Yahoo Store Editor Settings (Continued)

Publishing Your Store

It is very important that you adhere to the following procedure when publishing your store. When you sign up for the Promo Manager, we will send you a link that is used to update our system with the necessary data from your store. You **MUST** open this link each time you publish your store, but only once the publish is completed. For most stores, this link takes less than 10 seconds to load. Actual load time depends on the number of items in your store. When the link is done loading, you will see a confirmation telling you how many items were added to your database. If you do not get any response, do not see the confirmation, or the number of items does not seem accurate to you, please contact us for assistance.

One other note about publishing your store. Prior to clicking the “publish” button in your Yahoo Store, you should click “Variables,” and then click “Update.” This ensures that your store is fully published. Failure to do this may cause a partial publish and some data may not be updated correctly.

RTML Template:

As part of the installation of the Promo Manager, we will also create an RTML template that sends your product data into our system. This template will not in any way affect the way you use your Yahoo Store, and you will not need to access it.





Shipping & Tax

As an added value to the Promo Manager, you will also control your Yahoo Store's shipping via our system. Our system will allow you all the features and benefits of the Yahoo Store Shipping Manager, and will also give you the following added features:

- Overweight packages will automatically be divided into multiple shipments and added together, avoiding a \$0 shipping rate.
- Option to use your UPS discounted rate instead standard UPS rates.
- Markup/Markdown of shipping for an order. Markups/Markdowns can also be based on the State or Zip code that your customer is located in. Markups may be given in based on a percentage of shipping rate, or a dollar amount.
- Ability to add FedEx and/or USPS real time rates for an additional monthly fee of \$15/courier.

Using The Promo Manager's Shipping System

If you are using KingWebmaster's Advanced Shipping Manager, then please disregard this section, and use the documentation that you received when you signed up.

For convenience, we designed the Promo Manager's shipping system to work in a very similar fashion as the built in Yahoo Store shipping manager. We also added a few enhancements to it that should make things easier, as shown above.

You should have a received a login URL, username, and password for the Promo Manager's shipping and tax system. When you log in, you will see the following 5 sections in the top navigation menu:

(Continued...)





Shipping & Tax (Continued)

- **General**
- **Shipping Methods**
- **Shipping Rates**
- **Shipping Markups**
- **Tax Rates**

General:

In this section, you will see the following 3 links:

1. Edit company's settings.
2. Edit UPS settings.
3. Edit/View real-time methods' names & numbers.

For 1 and 2, these are one time use settings. They allow you to set your UPS account number, company details, etc. You should enter the appropriate responses next to each prompt. Under normal circumstances, you will not have to go into these sections other than during the initial setup.

For number 3, "Edit/View real-time methods' names & numbers": In this section, you should set the names of the UPS Real-Time shipping methods. Once you set these to the exact name/wording that you desire, you should also go to your Yahoo Store Manager, and click on the "shipping manager" link, and then go to "shipping methods," and make sure that the methods that you wish to offer in your store match exactly, letter for letter, with shipping methods in the Promo Manager's shipping system.

When you are done, please publish your order settings.

(Continued...)





Shipping & Tax (Continued)

Shipping Methods

This section allows you to set your custom shipping methods. A “custom shipping method” is a shipping method that is NOT connected in real-time with UPS. For example, if you use table-based shipping rates, then you would use this section.

To create a new method(s), enter the number of new methods that you would like to create, and then click “Add.” Name each new method as you would like it to appear in your store.

When you are done, go to the Yahoo Store Manager, click on “Shipping Manager,” then “Shipping Methods,” and create the EXACT same shipping method. The name(s) of the method(s) MUST match letter for letter including any spaces and punctuation. To ensure accuracy, copy/paste the shipping method’s name, instead of re-typing.

When you are done, please publish your order settings.

Shipping Rates

This section will work almost identically to your Yahoo Store’s shipping rates.

You should set up the rates by entering/selecting the appropriate response next to each prompt. The prompts are self-explanatory, and work in the same way as in the Yahoo Store shipping rates. If you need assistance, please do not hesitate to contact us.

Shipping Markups

One of the advantages of using the Promo Manager’s shipping system is that you will have the ability to markup/markdown shipping rates. You can do this either by a dollar amount, percentage, or combination of both.

(Continued...)





Shipping & Tax (Continued)

Furthermore, you can specify that the markup/markdown only be given in specific states or zip codes.

To create a markup/markdown, click “Add a new shipping markup” button.

Select the shipping method which you would like to markup/markdown. Enter the dollar amount and/or percentage markup/markdown that you would like to use. For mark-downs, enter a minus sign (-) before the dollar amount or percentage.

Select the state or enter the zip code if you would like the markup/markdown to apply only to a specific shipping destination. Do not select any state or enter a zip code if you would like it to apply to all destinations.

Tax Rates

The Yahoo Store system requires that shipping and tax be calculated at the same time, therefore, the Promo Manager will also control your tax rates. The tax rates section is very easy to use. Simple enter the tax rate in the “Tax (%)” column for the state(s) in which you are required to charge sales tax. If you are also required to charge tax on the shipping charges, then check the box in the “Tax Shipping” column.

In some cases, you may be required to charge a flat rate for tax. If needed, enter the dollar amount in the “Tax (flat)” column for the appropriate states.





Order Manager Set-Up

Stone Edge or other Order Managers that rely on the Yahoo! Order Format:

The following must be done for your discounts to appear properly:

1) In your order manager, create the following item:

LocalSKU: KWMPM

Price: -1

Ignore QOH: Yes

Location: ZZZZZ*

*Only include this if you are using Barcoders.com's wireless barcode fulfillment system to accompany Stone Edge.

2) Change your Real-Time Link:

In the following link, after the "post_to=" enter your order manager's URL (The URL that should be entered here is currently your real-time order link. So copy paste your real-time order link after the "post_to=" and the entire link will now be your real-time link.)

[https://www.promomanager.com/order_managers/pm_om_yahoo_format.php?
post_to=](https://www.promomanager.com/order_managers/pm_om_yahoo_format.php?post_to=)

3) Change the order format to XML. Your orders will still post in Yahoo's format, this is for our order processing purposes.

Order Motion or other Order Managers that rely on XML Format:

You only need to do the following if your order manager is not able to process discounts.

Please follow steps 1 and 2 from above, using the following link for step 2:

https://www.promomanager.com/order_managers/pm_om_xml.php?post_to=





Summary Page

This page shows you a list of all your promotions, allows you to add new promotions, edit and delete promotions, and toggle the status of your promotions (active/inactive).

For promotions with multiple conditions, you will see the same promotion listed multiple times (once for each condition). They will be grouped together in the order that they were created. You can delete, edit, or change the status of each of the promotion's conditions.

Create a new promotion:

Simply click either one of the two "Add New Promotion" buttons, and follow the on-screen instructions.

Edit a promotion:

Click the "Edit" button located in the row of the promotion that you would like to edit.

Delete a promotion:

Click the "Delete" button located in the row of the promotion that you would like to delete.

Change promotion status:

In the drop down box located in the row of the promotion that you would like to change, simply select either "active" or "inactive." As soon as you change the status for a promotion, you will see a confirmation telling you that the status was changed.

(Continued...)





Summary Page (Continued...)

Auto Add and Clear:

This is the automatic add-to-cart feature for promotions that have a single, specific item as the reward. Select the radio button of the promotion you want to have automatically add your specific item to the cart. (The item added will be the item you specified in Step 3, see page 23). **This feature can only run on one promotion at a time.**

When your customers meet your condition, the Promo Manager will automatically add the item to their cart and discount the cart's total for the amount of the item. The item will only be free when the condition is met. If the customer changes their cart and the condition is no longer met, the reward item will then be treated like any other item in a shopper's cart and they will be charged for it.

Click "Clear" to remove the Auto Add from a promotion.





Step 1: Type of Promotion or Condition

Is this a new rule?

If you are creating a new promotion, select "Yes." If you are adding a new condition to a promotion, then select "No..." and choose the existing rule from the drop down menu.

An example of when you would add a condition: if you have a promotion that states that every order over \$100 receives free shipping, and you want to add the condition that this is only for customers with a New York shipping address.

If you selected to create a new promotion, then enter a name for the promotion in the provided field. Make it catchy! What you type here is what your customers will see in their shopping carts when they qualify for your promotion.

Cart Contents:

Set conditions for a promotion based on what item(s) are in the shopping cart.

Cart Value:

Set conditions for a promotion based on the total value of item(s) in the shopping cart.

Date, Day, and Time:

Set conditions for a promotion based on the time, day(s), or date(s).

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Step 1: Type of Promotion or Condition (Continued)

Shipping Address:

Set conditions for a promotion based on your customers' shipping zip code, state, or country.

Promotion Code:

Set conditions for a promotion that requires the use of a promo code.

When you are done, click "Next" to continue to Step 2.





Step 2: By Cart Contents

Specific Item(s):

Select the item(s) that must be added to the cart in order to qualify for the promotion. You can select multiple items by holding down the CTRL key and clicking the required items.

Please note that for your convenience, each item's code is in parentheses to the right of its name.

Items with variable:

First, enter the number of items that must be added to the cart to qualify for the promotions. (For instance, the "2" in "Buy 2... Get 1 Free.") Next, select the variable that you would like to use to determine which items must be added to the cart to qualify for the promotion. You may choose from ID, Code, Name, Selling Price (uses current selling price for item), and 5 other preset custom variables (set in your Yahoo Store Editor).

Next select if the value of the chosen variable must be "Equal," "Not Equal," "Includes," "Excludes," "Greater Than," or "Less Than" what you enter in the next input box to the right.

For example, you can set 3 items with variable "Code" that "Include" "TRA-"

In this case, when your customer adds to her cart any 3 items containing "TRA-" within their "Code," then the customer qualifies for the promotion.

When you are done, click "Next" to continue to Step 3.





Step 2: By Cart Value

Set the total value of the items that must be added to the cart to qualify for the promotion. You may also set whether the total value must be greater than, less than, or equal to a specific amount. In most cases, you would specify greater than. For example: All orders greater than \$100 receive free shipping.

Total Value includes all items in shopping cart or Total value includes only items with variable:

Choose whether or not you want the threshold you set, like the \$100 above, to require a specific variable. You would use the variable option if you wanted to create a promotion that says Free Shipping on all Brand XYZ orders over \$100.

Shopping cart's total value includes Yahoo coupon discount value:

Check this box if you want to use the total value of the cart after a Yahoo store coupon is applied.

Leave this unchecked if you want the total value of the cart to be calculated prior to applying a Yahoo store coupon.

When you are done, click "Next" to continue to Step 3.





Step 2: By Date, Day of the Week, and Time

This section allows you to create a promotion based on Time of Day, Day of Week, or Date.

Specific Time:

Select this option to run a promotion for 1 minute. For example, you can run a promotion telling your customers that for 1 minute between 2 and 3 PM, they will receive a free item.

Range of Times:

Choose this option to select a span of time to run your promotion.

Specific Date:

Choose this option to set a single date for your promotion.

Range of Dates:

Choose this option to set a range of dates to run your promotion.

Day(s) of theWeek:

Select specific day(s) of the week to run your promotion.

If you would like to run a promotion on a specific DAY and TIME, then you would need to first set the days or dates, and then finish setting up the promotion. Then Add a new condition to the promotion that specifies the time of day for the promotion.

When you are done, click "Next" to continue to Step 3.





Step 2: By Shipping Address

This section will allow you to create promotions for your customers that are in a specific location.

Please note that location is based on your customers' Shipping Addresses.

Zip Code:

Select this option if you want the promotion to only apply to customers in a specific zip code.

Zip Code Range:

Select this option to allow customers within a specific range of zip codes to receive the promotion. For example, set 33400 through 33499, and someone with 33467 would receive the promotion.

Zip Code Prefix:

Select this option to make the promotion apply to customers whose zip code begins with a specific 3 digit prefix. For example, all customers whose zip code begins with 334 will receive the promotion.

State/Country:

Select either a state or country to offer the promotion to people located in a specific state or country.

When you are done, click "Next" to continue to Step 3.





Step 2: By Promo Code

Use this section to create promo code-based promotions. This will require your customers to enter a promo code during checkout to receive the promotion.

When you are done, click "Next" to continue to Step 3.

Note: These Promo Codes are entered into a different field than Yahoo's Coupon Code. When both boxes are present, it might be a little confusing to your customers. To cut down on confusion, you may want to hide the Yahoo! Coupon code entry field. To do this, log into your Store Manager. Under Order Settings, select Checkout Manager. Then select Page Configuration. Scroll down Page Sections. To turn off Yahoo's coupon code entry field, check "Hide" for "Coupon Code."

Another tip would be to market your code as a "Promo Code" instead of a "Coupon Code" to be sure and define the difference.

When you are done, click "Next" to continue to Step 3.





Step 3: Rewards

In this step, you choose what reward you are giving to your customers.

Discounted or Free specific item(s):

Enter the number of items that you would like to give to the customer (either free or discounted). Then below, select completely free, half price, or enter a percentage off. Next, select the item(s) that you are offering, either free or discounted. Note that this is a pool of items. So for example, if you are offering 1 free item, you can still select several items, and allow your customers to pick 1 of the items from the pool. You can select multiple items by holding down the CTRL key and clicking the items. Items are listed by name and contain their respective codes in parentheses.

Free items with variable:

This option works just like the previous option, however, the item pool is determined by a specific variable.

First, enter how many items you will be giving to your customers (free or discounted). (For instance, the "2" in "Buy 2... Get 1 Free." Next, select the variable that you would like to use to determine which items must be added to the cart to qualify for the promotion. You may choose from ID, Code, Name, Selling Price (uses current selling price for item), and 5 other preset custom variables (set in your Yahoo Store Editor).

(Continued...)





Step 3: Rewards (Continued)

Next select if value of the chosen variable must be “Equal,” “Not Equal,” “Includes,” “Excludes,” “Greater Than,” or “Less Than” what you enter in the next input box to the right. For example, you can set 3 items with variable “Code” that “Include” “TRA-”. In this case, when your customer adds to her cart any 3 items containing “TRA-” within their “Code,” then the customer qualifies for the promotion.

Dollar or Percentage Off the Value of the Shopping Cart:

Select one of these options if you would like to give a dollar amount or percentage off the value of the cart. For example, if you select 10% off, then your customers will receive 10% off provided that they meet the requirements in Step 2.

Shipping:

Select one of the following shipping rewards:

“Free Shipping” - This will give your customers free shipping for any of the selected methods. You may select multiple methods by holding down the CTRL key, and clicking the appropriate shipping methods.

“X Flat-Rate Shipping” - This will allow you to set a flat shipping rate for any individual shipping method(s). For example, if you set this to \$5, and select both UPS Ground and USPS Priority Mail, both methods will have a \$5 flat rate shipping charge and will override your normal shipping rules/rates.

“X% Off Shipping” - This allows you to discount a shipping method(s) by a percentage. Simply enter the percent off that you would like to give your customers, and then select the appropriate shipping method(s).





Step 4: Exceptions to Rewards

Note: This section only applies if your promotion's reward is based on a **VARIABLE** or offers a percentage off of **CART VALUE**.

Exceptions when Reward is based on VARIABLE

For example, if in Step 3, you specified that your customers will receive any item that has "TRA-" in their code, here you can remove individual items from that group of items. You may also cross-reference items using a different variable in order to remove them from the promotion. For example, your customers can select any item with "TRA-" in the code, however, not if the item's price is great than \$10.

Specific Item(s):

Select item(s) that you want excluded from being given to your customers as part of this promotion. For multiple items, hold the CTRL key and click on the items that you want excluded.

Items with variable:

With this option, you are creating a pool of items to exclude from the pool of items chosen to be given free or discounted to your customers as part of this promotion. You may choose from ID, Code, Name, Selling Price (uses uses current selling price for item), and 5 other preset custom variables (set in your Yahoo Store Editor).

Next select if value of the chosen variable must be "Equal," "Not Equal," "Includes," "Excludes," "Greater Than," or "Less Than" what you enter in the next input box to the right. For example, you can set items with variable "Price" greater than \$10 be excluded.

(Continued...)





Step 4: Exceptions to Rewards (Continued...)

Exceptions when reward is a Percentage off of CART VALUE.

Once the condition is met, the Promo Manager will discount a shopper's cart by percentage that you've set up as a reward in Step 3. Here you can set exceptions to what will count towards the discount. For example, if your reward is 10% off a cart of \$50 or greater, you can tell the Promo Manager here that you don't want to discount Item ABC. (For instance, if Item ABC didn't have a large enough margin to discount it.) The cost of ABC will still count towards the condition





Reporting

The Reporting feature allows you to see the results of all of your current and past promotions.

Active promotions will be in **bold**. Inactive promotions will be in **gray**.

Filters

Filter your results by the pre-designated time frames or by specific dates. All of the active and inactive promotions you had in the system during that time span will appear with results for the same time frame.

Carts Qualified

This number tells you how many carts qualified for a promotion. Qualification is determined by whether or not a cart included all requirements needed to meet both the condition and the reward.

Carts Converted

Out of all the carts that qualified, these are the carts that completed and submitted the purchase.

Average Reward

The average reward value of all your converted carts.

Average Cart

The average cart value of all of your converted carts.

Highest Reward

The highest reward value out of all of your converted carts.

Highest Cart

The highest cart value out of all of your converted carts.

