

Creating Discount Code on Shopify

Department: [Customer Service]

Date: [July 18, 2024]

Purpose/Goal

To establish a clear, consistent, and efficient process for creating discount codes within the Shopify platform. This SOP aims to ensure that all discount codes are created accurately and effectively, thereby enhancing promotional efforts and maintaining operational integrity.

Resources Needed

- Shopify admin Account
- CSR tracker

Knowledge Base

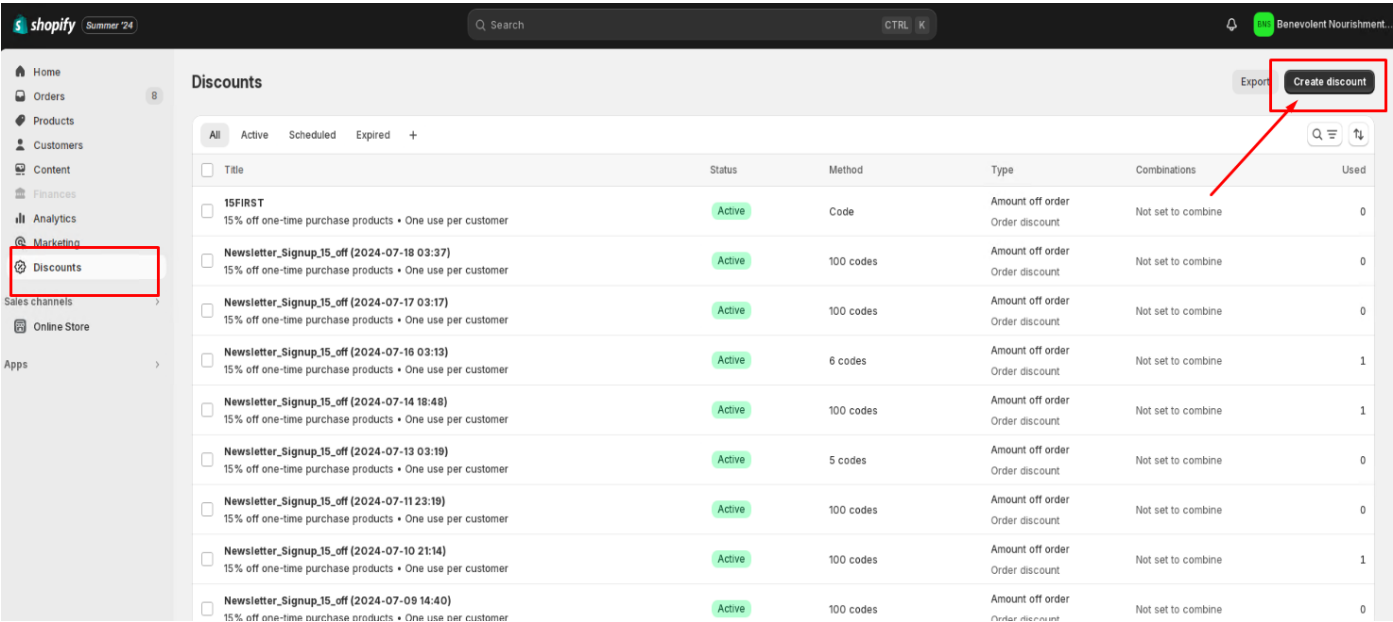
Attach Loom Video of SOP Being Done

- <https://www.loom.com/share/a6547fd22a704c51aa1626a9007a207d>

Overview of Steps

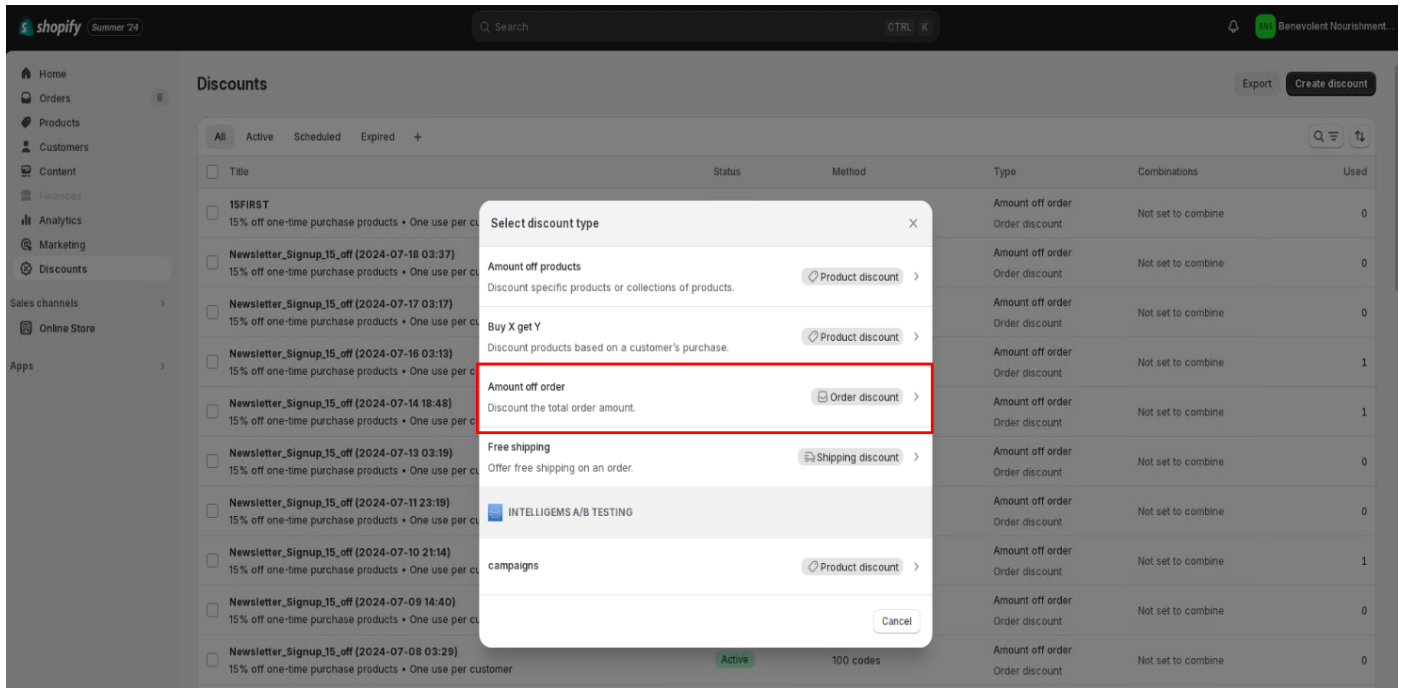
Step 1 - Log into Shopify Admin:

- Access the Shopify Admin dashboard using your credentials.
- From the Shopify Admin dashboard, click on Discounts in the left-hand sidebar.
- Click the Create discount button in the top right corner of the Discounts page.



Step 2 - Choose Discount Type:

- Select the type of discount you want to create:
 - **Amount Off order:** Discount the total order amount and customers enter a code at checkout to receive a discount.



Step 3 - Set Up the Discount Code:

- **Discount Code:** Enter a unique name for the discount code (e.g., SAVE10, SUMMER2024).
 - You can also click [Generate random code](#) to auto-populate code
- **Types of Discounts:**
 - Percentage: Enter the percentage discount (e.g., 10%).
 - Fixed Amount: Enter the fixed amount discount (e.g., \$10).
 - Free Shipping: Choose this option if offering free shipping.
 - Buy X Get Y: Set up a promotion where customers buy X items and get Y items for free or at a discount.

Note: We usually used Percentage for one-time code

Step 4 - Set Eligibility:

- Minimum Requirements: Set any minimum purchase requirements for the discount:
- Minimum purchase amount: Specify the minimum order value.
- Minimum quantity of items: Specify the minimum number of items.

shopify Summer '24

Unsaved discount

Discard Save

Benevolent Nourishment

Home

Orders 8

Products

Customers

Content

Finances

Analytics

Marketing

Discounts

Sales channels

Online Store

Apps

Create order discount

Amount off order

Order discount

Method

Discount code Automatic discount

Discount code

Generate random code

Create your code in the space

Customers must enter this code at checkout.

Discount Value

Percentage

Purchase type

One-time purchase

Minimum purchase requirements

No minimum requirements

Minimum purchase amount (\$)

Minimum quantity of items

Customer eligibility

Summary

No discount code yet

Type and method

- Amount off order
- Code

Details

- Can't combine with other discounts

Performance

Discount is not active yet

Sales channels

0 of 4 selected

- Google & YouTube
- Facebook & Instagram
- TikTok
- CC Product Sync

Step 5 - **Confirm the Cancellation:**

- Ensure that the subscription status is updated to **Cancelled**.
- Verify that no further charges will be made to the customer's account.
- Send a confirmation email to the customer acknowledging that their subscription has been cancelled.
- Include any relevant information about refunds (if applicable) and the effective date of the cancellation.

Step 6: **Customer Eligibility:**

- Choose whether the discount applies to:
 - **Everyone:** All customers can use the discount.
 - **Specific groups of customers:** Select customer groups, such as subscribers or VIPs.
 - **Specific customers:** Select individual customers.

Step 7: **Usage Limits:**

- **Limit number of times this discount can be used in total:** Set a maximum number of uses for the discount code.
- **Limit to one use per customer:** Ensure each customer can only use the discount code once.

Step 8: **Set Active Dates:**

- **Start date:** Specify when the discount will start.
- **End date:** Specify when the discount will expire (optional).

Step 9: **Save Discount Code:**

- Review all the details entered for the discount code.
- Click **Save** to create the discount code.

The screenshot displays the Shopify Discounts configuration interface. The left sidebar contains navigation links for Home, Orders, Products, Customers, Content, Finances, Analytics, Marketing, Discounts, Sales channels, Online Store, and Apps. The main content area is titled 'Unsaved discount' and includes a 'Discard' button and a 'Save' button. The configuration is divided into several sections:

- Minimum purchase requirements:** Includes radio buttons for 'No minimum requirements', 'Minimum purchase amount (\$)', and 'Minimum quantity of items'.
- Customer eligibility:** Includes radio buttons for 'All customers', 'Specific customer segments', and 'Specific customers'.
- Maximum discount uses:** Includes checkboxes for 'Limit number of times this discount can be used in total' and 'Limit to one use per customer'.
- Combinations:** Includes the text 'This order discount can be combined with:' and checkboxes for 'Product discounts', 'Order discounts', and 'Shipping discounts'.
- Active dates:** Includes fields for 'Start date' (set to 2024-07-18) and 'Start time (PDT)' (set to 2:27 AM). A red arrow points to the 'Start date' field. There is also a checkbox for 'Set end date'.

On the right side, there is a section for social media integrations with checkboxes for 'Google & YouTube', 'Facebook & Instagram', 'TikTok', and 'CC Product Sync'.

Document the Cancellation:

Record the details of the discount code in ([2024 CSR TRACKING Template](#)) spreadsheet and/or ASANA for reference.

Note the code, discount details, eligibility, and active dates.

This is how it looks when its completed and saved:

The screenshot shows the Shopify admin interface for creating a discount. The left sidebar contains navigation links: Home, Orders (8), Products, Customers, Content, Finances, Analytics, Marketing, Discounts, Sales channels (Online Store), and Apps. The main content area is titled '← 15FIRST' and includes buttons for Duplicate, Deactivate, and Promote. A green success message states: '15FIRST was created successfully. What's next? Use a shareable link to promote your discount code via email or social media. This discount will be applied at checkout when customers use this link. Get shareable link'. The 'Amount off order' section shows the discount code '15FIRST' (highlighted with a red box) and a 'Generate random code' link. Below this, the 'Discount Value' is set to 15% and the 'Purchase type' is 'One-time purchase'. The 'Minimum purchase requirements' section has 'No minimum requirements' selected. The 'Customer eligibility' section has 'All customers' selected. The 'Maximum discount uses' section has 'Limit to one use per customer' checked. A 'Summary' sidebar on the right shows the discount is 'Active', lists the type and method, details, and performance metrics, and includes a 'View the sales by discount report' link. At the bottom, the 'Sales channels' section shows 'Online Store' is selected.

Quality Control

- Ensure all discount details, such as percentage, fixed amount, or eligibility, are entered accurately.
- Confirm that the discount code is unique and not already in use.
- Ensure all relevant teams are informed about the new discount code and any specific details they need to know.

Revision History

Date	Version	Description	Approved
07-18-2024	1.0.0	Initial document and draft created	Cherry
07-18-2024		Loom Video	Charlen