

Setting Up Auto-add Triggers for Promotions or Required Deposits

WHAT IS AN AUTO-ADD TRIGGER?

The **Automatic Add** trigger automatically adds product(s) to the Shopping Cart when a shopper meets the trigger requirements. The trigger may be the addition of a product to the Shopping Cart; the addition of any product in a specified category to the Shopping Cart; the use of a Coupon; or the passing of a querystring parameter*. (**This document does not address the querystring trigger, which is an advanced feature that requires a basic understanding of querystrings, and how they are passed.*)

Examples:

Product Triggers:

- If a shopper adds one or more specific product(s) to the cart, one or more specific product(s) (same or different item) is automatically added to the cart for free (or any other specified price)
 - Buy one 12oz can of peanuts, get a 2nd 12oz can of peanuts for 50% off
 - Buy one 12oz can of peanuts, get a 6oz can of peanuts for free
 - Buy one 12oz can of peanuts, get a 12oz can of cashews for free
 - Buy two jars of peanut butter, get one jar of grape jelly for free
 - Buy six jars of peanut butter, get one jar of grape jelly and one jar of strawberry preserves for free
- Buy an item (such as an oil filter) and automatically add a mandatory fee (such as a recycling fee) to the cart that can't be removed if the filter is in the cart.

Category Trigger:

- If a shopper adds any product to the cart from a specific category, another specific product (same or different item, from any category) is automatically added to the cart for free (or any other specified price)
 - Buy any pet collar from the Collars category, get a specific bag of treats for free
 - Buy two jars of any kind of nut butter from the Nut Butters category, get a jar of grape jelly for 50% off.

Coupon Trigger:

- If a shopper uses a specific coupon code and meets the coupon requirements, they get something for free (or at a discount). So if you set up a coupon that gives a free widget for a purchase of \$75 or more, and the shopper enters that coupon code (or it's an auto-coupon), then the widget would automatically be added to the cart once the shopper added at least \$75 of items to the cart.

Important Notes:

1. Note that automatic add triggers can be used only if a shopper is not required to make a selection about the automatically-added item, such as flavor, type, size or color. Auto-add triggers can be set only on the Product level, not on the SKU level. Accordingly, if you select a product that has attributes (and therefore multiple SKUs) as the auto-added item, the default SKU is the one that will be auto-added to the cart when triggered.

- Automatic Adds do not apply to Direct Checkout, or when editing orders from within the Order Management System.

HOW TO SET UP AN AUTO-ADD

There are four important steps:

- Set up your auto-add preferences
- Ensure that all products and coupons involved in the auto-add are set up as products in your Order Management System (OMS)
- Set up the trigger
- Test your online store thoroughly to ensure that you've created the desired result

A. STEP ONE: Set up your Auto-Add Preferences

(Products / Preferences [blue button at top] / Automatic Add Preferences)

This image reflects the default settings:

Automatic Add Preferences ?

Write-In Attribute Value (Letters) ? : default

Write-In Attribute Value (Numbers) ? : 1

Write-In Checkbox ? : Unchecked

Bid Price ? : \$ 0.00

Ship-To Address ? : Most Recent Ship-To

Quantity Relationship ? : Single Add

☒ Allow Product QueryStrings ?

☐ Multiply Quantity ?

☒ Enforce Coupon Requirement ?

☒ Override Product Visibility ?

Most often you will retain most of the default settings, and in most cases it is important that both “Enforce Coupon” and “Override Product Visibility” remain checked.

However, in every case, you must carefully consider your selections for both “Multiply Quantity” and “Quantity Relationship”, as those settings change most often and correct selections are critical to achieving your desired goal.

Multiply Quantity:

For Product and Category Automatic Add Triggers, the Multiply Quantity option allows the automatically added product to be multiplied. For example, assume you have set up a trigger to automatically put one of Product B in the cart when Product A is placed in the cart. If Multiply Quantity is checked, then for each Product A that is purchased, a customer will get another Product B. However, if Multiply Quantity is not checked, then no matter how many of Product A are ordered, a customer will only get one of Product B. (Note that Multiply Quantity is irrelevant to Coupon triggers.)

Quantity Relationship:

Below is a quick-glance chart to compare the various options. The most important factors for your selection consideration are highlighted in gray in the chart. Additional explanation follows below.

Auto-Add Preferences Quick Reference Chart - Quantity Relationship

	Single Add	Allow Excess	Locked Add	Locked to Trigger	Flexible Lock
How many auto-added products are added to the cart upon trigger	the product is added to the Shopping Cart only in sufficient quantity to bring the total quantity in the cart up to the Automatic Add Quantity.*	the Automatic Add Quantity is added to the Shopping Cart, regardless of the preexisting contents of the cart.	the product is added to the Shopping Cart only in sufficient quantity to bring the total quantity in the cart up to the Automatic Add Quantity.*	the product is added to the Shopping Cart only in sufficient quantity to bring the total quantity in the cart up to the Automatic Add Quantity.*	the product is added to the Shopping Cart only in sufficient quantity to bring the total quantity in the cart up to the Automatic Add Quantity.*
Does added item get removed from cart when trigger is removed?	NO, customer must remove it manually	NO, customer must remove it manually	NO, customer must remove it manually	YES	YES
Can the shopper remove the added item while the trigger is in the cart	YES, and trigger stays there	YES, and trigger stays there	NO - shopper must take the added item if the trigger is there.	NO - shopper must take the added item if the trigger is there.	YES, and trigger stays there
Does auto-add re-activate when putting things in and out of the cart?	NO. If both items are removed from the Shopping Cart completely, the Automatic Add will not re-activate even if trigger item is added back.	NO. If both items are removed from the Shopping Cart completely, the Automatic Add will not re-activate even if trigger item is added back.	YES	YES	NO
Can the shopper increase qty of added item if item is otherwise visible to the shopper?**	YES	YES	YES	YES	YES

* For example, suppose you had a widget with an Automatic Add Quantity of 3, when Trigger Conditions are met. If 1 widget were already in the Cart when the automatic add occurs, an additional 2 would be added to bring the quantity only up to 3, and not beyond it. If 3 of the widget were already in the Cart, no additional widgets would be added.

** The auto-added item might be something you usually sell, but you're offering it here at a discount or free (so it may be otherwise visible to the shopper), or it might be an item you don't sell on its own (so it would be set to internal and not otherwise visible to the shopper) If the item is NOT otherwise visible to the shopper, then the shopper could not increase the quantity of the added item.

The two most commonly-used settings are “**Flexible Lock**” and “**Locked to Trigger**”:

Flexible Lock: An example of a “Flexible Lock” promotion would be a free item with purchase, where the customer is permitted to decline the free item. So, let's say a shopper would get a free chocolate bar with the purchase of a jar of peanut butter.

- If the shopper wanted the peanut butter but did not want the chocolate bar, they *could* remove the chocolate bar from the cart.
- If the shopper removes the peanut butter from the cart, the chocolate bar would automatically disappear as well.
- If the chocolate bar is otherwise visible to the shopper (based on visibility settings), the shopper could add additional chocolate bars to the cart, but they would only get the promotional price on the number of chocolate bars relevant to the promo. Additional bars would be added at the regular price.
- If the chocolate bar is not otherwise visible to the shopper (based on visibility settings), then they could not increase the quantity of chocolate bars in the cart.

Locked to Trigger - two examples:

1. An example of a “Locked to Trigger” promotion would be a free sample with purchase, where the customer is NOT permitted to decline the sample. So, let's say a shopper would get a free chocolate bar with the purchase of two jars of peanut butter.

- If the shopper buys the peanut butter they must also take the chocolate bar. They *could not* remove the chocolate bar from the cart without removing the peanut butter.
 - If the shopper removes the peanut butter from the cart, the chocolate bar would automatically disappear as well.
 - If the chocolate bar is otherwise visible to the shopper (based on visibility settings), the shopper could add additional chocolate bars to the cart, but they would only get the promotional price on the number of chocolate bars relevant to the promo. Additional bars would be added at the regular price.
 - If the chocolate bar is not otherwise visible to the shopper (based on visibility settings), then they could not increase the quantity of chocolate bars in the cart.
2. Another (non-promotional) example of a use of “Locked to Trigger” would be that when a shopper adds an oil filter to their cart, a mandatory recycling fee is also added to the cart, and it can’t be removed so long as the filter is in the cart. This setting would require that the person pay the recycling fee if they buy an oil filter. They could not remove the recycling fee from the cart without removing the filter, and if the filter and fee were removed from the cart and the filter were re-added, the auto-add would re-trigger to once again place the fee in the cart with the filter.

B. STEP TWO: Ensure that all products and coupons involved in the auto-add are set up in the OMS. Both the trigger items, whether product(s) or a coupon, and all items to be auto-added to the cart, must be set up in the OMS. In doing so, consider the following:

1. If you don’t otherwise sell the product, set the product at internal visibility only, and ensure that the preference called “Override Product Visibility” is checked. This will ensure that even though customers can’t manually add the item to the cart on their own or increase the quantity once it’s there, the item will nevertheless appear in the cart when the trigger is activated.
2. If you do otherwise sell the product, and you are offering it for free or at a discounted price with the auto-add, consider how the price will be discounted:
 - If you are not using any integrations and it won’t affect your inventory process, then you can create a duplicate product that is priced at \$0 or any reduced price. (You cannot create duplicates while using Transaction Manager, or any integration with an ERP or other system through which you are passing SKU, Product or Order data. The “duplicate” would have to have a separate SKU number, and then testing through the integration would be required.)
 - Consider a coupon (or auto-coupon) to make it free or a reduced price. This method applies regardless of integrations and inventory processes.
3. If a coupon is the trigger, the coupon must be set up properly before proceeding with auto-add set up. Tip: if using a trigger of a coupon with a threshold (eg: spend \$75 to get this promotion), don’t forget to set Discount Application at either Least Expensive or Most Expensive, and then check “Threshold excludes application” on the coupon set up page, so as to preclude the value of the auto-added product to be counted in the coupon Threshold.

C. STEP THREE: Set up the trigger.

1. Navigate to Products and click the pencil next to the product that you want auto-added to the cart if a trigger is activated. On page one under Product Options, enter the number of triggers you want to set up to effect this auto add.

Product Options	
Number of Attributes ?	0
Number of Specifications ?	0
Number of Related Products ?	0
Number of Write-In Attributes ?	0
Number of Additional Categories ?	0
Number of Automatic Add Triggers ?	1

For example, if a shopper gets a jar of grape jelly when they buy a jar of peanut butter, then this would be set up on the grape jelly, and there would be one trigger. If a shopper gets a jar of grape jelly if they buy either a jar of peanut butter or a jar of almond butter, then this would be set up on the grape jelly, and there would be two triggers, one for product peanut butter and one for product almond butter.

2. Once you fill in the number of triggers, click “Next” at the bottom of the page.
3. Scroll down on page two to the section for Automatic Add Triggers.
4. For each Trigger, first select the **Trigger Type** – Product, Category or Coupon.
(Remember, a Product Trigger must be a specific Product, not a choice of products. A Category Trigger means any product within a specific category, and a Coupon means a specific Coupon.)
5. Next fill in the **Automatic Add Quantity** (eg: how many jars of the grape jelly do you want auto-added to the cart if the trigger is activated)
6. For Product and Category triggers:
 - Select either the **Trigger Product or Trigger Category** (the item they have to place in their cart to trigger the auto-add of the grape jelly. For example, if it's Skippy Peanut Butter, then it's a Product trigger. If it's any nut butter in the Nut Butters category, then it's a Category trigger.)
 - Last, enter the **Trigger Quantity** – how many of the trigger items does the shopper have to put in their cart for the auto-added item to appear. If they have to buy 1 jar of peanut butter to get the jelly, then enter 1. If they have to buy 2 jars of peanut butter to get the jelly, then enter 2. For a category trigger, if they have to buy any 2 jars of nut butter from the Nut Butter category to get the jelly, then enter 2.
7. For Coupon Triggers: Select the specific **Trigger Coupon**.
8. Click Finish (or Next) at the bottom of the page

(see Auto-Add Set up Examples on next page)

Examples of Trigger Set Ups: (For all three examples this is set up on the grape jelly product.)

Product Trigger: The following reflects a product trigger to auto-add one jar of grape jelly when they purchase 2 jars of Acme Peanut Butter.

(Existing) Automatic Add Trigger #1

Automatic Add Quantity:

Trigger Type: Trigger Quantity:

Trigger Product:

☐ Delete Trigger

Category Trigger: The following reflects a category trigger to auto-add two jars of grape jelly when they purchase four jars of nut butter of any kind from the Nut Butters category.

(Existing) Automatic Add Trigger #1

Automatic Add Quantity:

Trigger Type: Trigger Quantity:

Trigger Category:

☐ Delete Trigger

Coupon Trigger: The following reflects a coupon trigger to auto add one jar of grape jelly when they use the coupon FreeJelly. The FreeJelly coupon in this case is set up as a 100% discount only on the grape jelly product. Discount Application is set to Least Expensive, a threshold order quantity of 2 is set, "Threshold Excludes Application" is checked, and an additional purchase of quantity 2 products in the Nut Butters category is required.

(Existing) Automatic Add Trigger #1

Automatic Add Quantity:

Trigger Type:

Trigger Coupon:

☐ Delete Trigger

D. STEP FOUR: TEST! TEST! TEST! (and that means try to break it.) It is really important for you to test your auto-add set up to ensure that the auto-add acts the way you intended. Testing doesn't mean go in there once and do things exactly as you hope a customer will. (Customers will never act like you hope they will!) Testing means trying it with other products in the cart, without other products in the cart, adding things in varied order, adding to the cart to trigger the auto-add, then removing all products from the cart and then re-adding, etc.

Remember that if you are using Single Add or Add Excess, those Quantity Relationships do not re-activate if things are removed from the cart after the auto-add was triggered. But the other Quantity Relationship selections should re-activate.