



User Guide

Sales

Genius

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Getting Started

With Sales Genius, you can offer personalized pricing, private sales, promotions, and bulk discounts to specific customers and markets.

Installing the app

- ① Go to the Shopify App Store and search for "Sales Genius".
- ② Install the app.
- ③ Access it through the "Apps" section of your Shopify account.

Subscription Plans

Basic Plan

The Basic plan offers the following features:

- ✓ 1 segment
- ✓ 1 market
- ✓ Maximum 40 rules/product

Advanced Plan

The Advanced plan offers the following features:

- ✓ 10 segments
- ✓ 10 markets
- ✓ Maximum 40 rules/product

Premium Plan

The Premium plan offers the following features:

- ✓ 10 segments
- ✓ 10 markets
- ✓ Maximum 40 rules/product

Setting up the app with the Setup Wizard

The Setup Wizard installer helps you integrate the app by automatically making the necessary changes.

Discounts

Sales Genius needs to create discounts to apply the custom prices on the cart and checkout pages.

When launching the Setup Wizard, the discounts will automatically be created.

For Sales Genius to fully work, you should not delete the 5 discounts created by the app.

If you accidentally delete or deactivate one or all of the discounts, the Setup Wizard can recreate them.

Steps

- 1 Go to **Sales Genius > Setup Wizard**.
- 2 Click on **Check again**.
- 3 Your discounts are automatically created or activated.

Create the `syde_price.liquid` snippet

To display your custom prices on your product and collection pages you need to add a liquid snippet to your template. This process is entirely automated.

Steps

- 1 Go to **Sales Genius > Setup Wizard**.
- 2 Click on **Check Again** at the top or bottom right of the Setup Wizard window.
- 3 The Setup Wizard will recheck every step, starting with Discounts.
- 4 The Setup Wizard will automatically create the `syde_price.liquid` snippet.
- 5 Once the liquid is created, **Completed** will be displayed at step 2.

2 **Completed**

Create the `syde_price.liquid` snippet [Learn more](#)

This step is required to display the custom prices on the product and collection pages.

In case the creation of the `syde_price.liquid` snippet fails, you can create the snippet manually by going to **Sales Channels > Online Store**.

Click on the three dots next to **Customize** and click **Edit Code**.

[Contact us](#) to get the code snippet for the creation of `syde_price.liquid`.

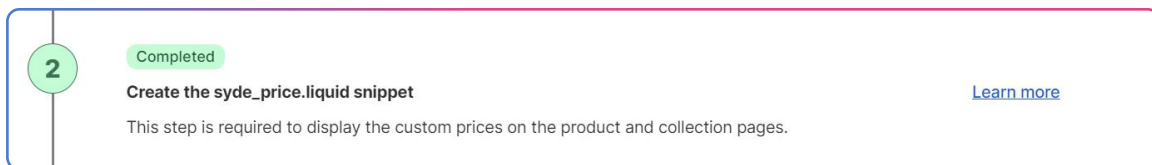
Create the `syde_rules_eval.liquid` snippet

To display your custom prices on your product and collection pages, you need to add a liquid snippet to your template. This process is entirely automated.

Steps

- ① Click on **Check Again** at the top or bottom right of the Setup Wizard window.
- ② The Setup Wizard will recheck every step.
- ③ The setup wizard will automatically create the `syde_rules_eval.liquid` snippet.

Once the liquid is created, **Completed** will be displayed at step 3.



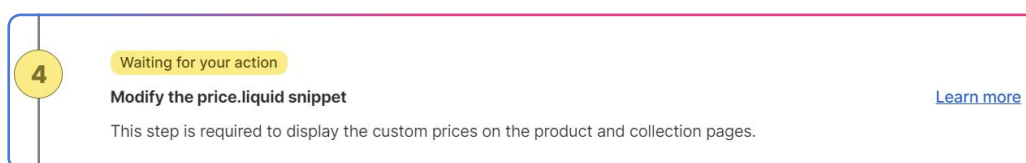
In case the creation of the `syde_rules_eval.liquid` snippet fails, you can create the snippet manually by going to **Sales Channels > Online Store**.

Click on the three dots next to **Customize** and click **Edit Code**.

[Contact us](#) to get the code snippet for the creation of `syde_rules_eval.liquid` snippet.

Modify the `price.liquid` snippet

To display your custom prices on your product and collection pages you also have to modify the `price.liquid` snippet. You will need to add manually the code snippet.



Before starting make sure that the status of this step is Waiting for your action.

Steps

- ① Select the code snippet in the blue box.
- ② Copy your selection.
- ③ Click on **Edit the snippet** located below the code snippet.
- ④ You are redirected to the price.liquid edit code page.
- ⑤ Identify the beginning of the html code

Edit the snippet

```
price.liquid x
• Recent changes
Current v
1 {% comment %}
2   Renders a list of product's price (regular, sale)
3
4   Accepts:
5   - product: {Object} Product Liquid object (optional)
6   - use_variant: {Boolean} Renders selected or first variant price instead of overall product pricing (optional)
7   - show_badges: {Boolean} Renders 'Sale' and 'Sold Out' tags if the product matches the condition (optional)
8   - price_class: {String} Adds a price class to the price element (optional)
9
10  Usage:
11  {% render 'price', product: product %}
12  {% endcomment %}
13  {%- liquid
14    if use_variant
15      assign target = product.selected_on_first_available_variant
16    else
17      assign target = product
18    endif
19
20    assign compare_at_price = target.compare_at_price
21    assign price = target.price | default: 1999
22    assign available = target.available | default: false
23    assign money_price = price | money
24    if settings.currency_code_enabled
25      assign money_price = price | money_with_currency
26    endif
27
28    if target == product and product.price_varies
```

Note: HTML code is written using tags enclosed in angle brackets (< >), while Liquid code is written using tags enclosed in curly brackets and percent signs ({% %}).

- ① Paste the code right **before** the beginning of the HTML code
- ② Click **Save** at the top right corner
- ③ Go back to the Sales Genius Setup Wizard.
- ④ Click on **Check Again**.

Completed is now displayed at step 4.

4

Completed

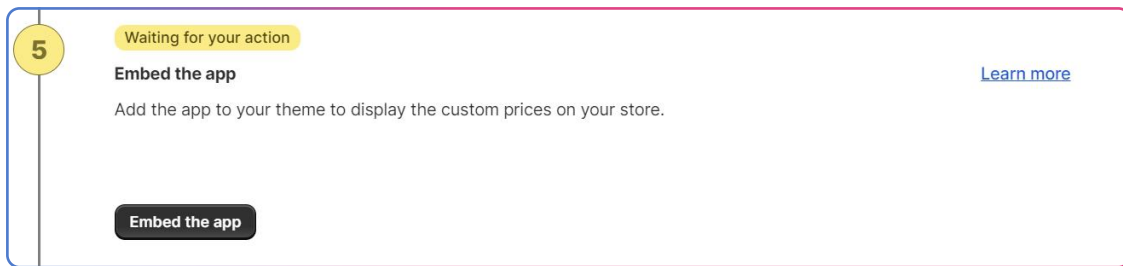
Modify the price.liquid snippet

[Learn more](#)

This step is required to display the custom prices on the product and collection pages.

Embed the app

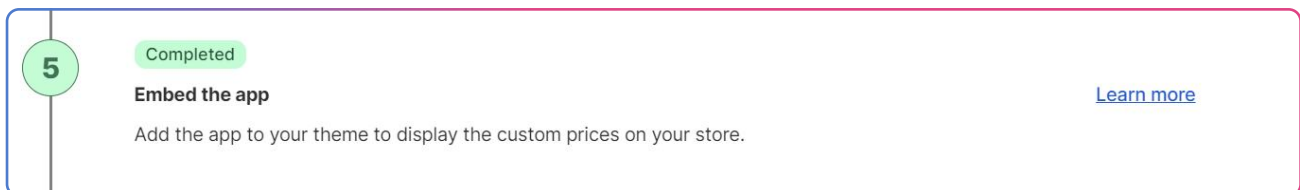
The last step of the Setup Wizard is to add the app to your theme so it can be displayed in your store.



Steps

- 1 Click on **Embed the app**.
- 2 You will be redirected to the **customization page** for your theme.
- 3 In the app embeds side panel, click on the toggle switch next to Sales Genius.
- 4 Click on **Save** at the top right corner of the window.
- 5 Go back to **Sales Genius > Setup Wizard**.
- 6 Click on **Check again**.

Completed is now displayed at step 5.



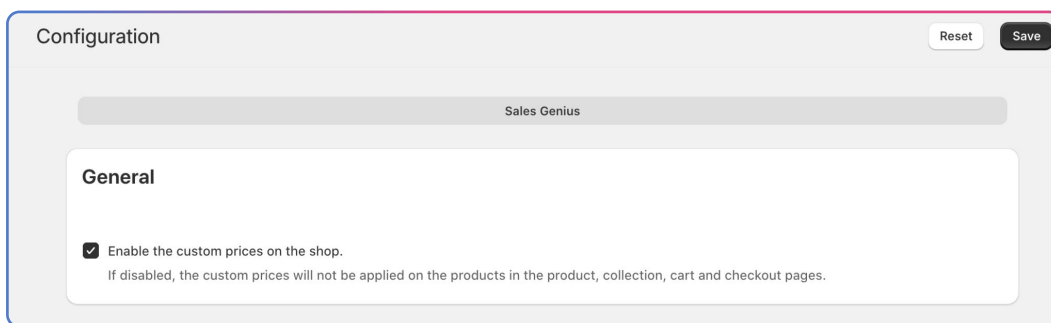
You have now completed the installation of Sales Genius, you can start creating your first price rules set.

Enabling the custom prices on the shop

To apply the custom prices on the products in the product, collection, cart and checkout pages, you need to enable the custom prices.

Steps

- 1 Go to **Configuration**.
- 2 In the General section, tick the box **Enable the custom prices on the shop**.
- 3 Click **Save**.



Implementing pricing rules

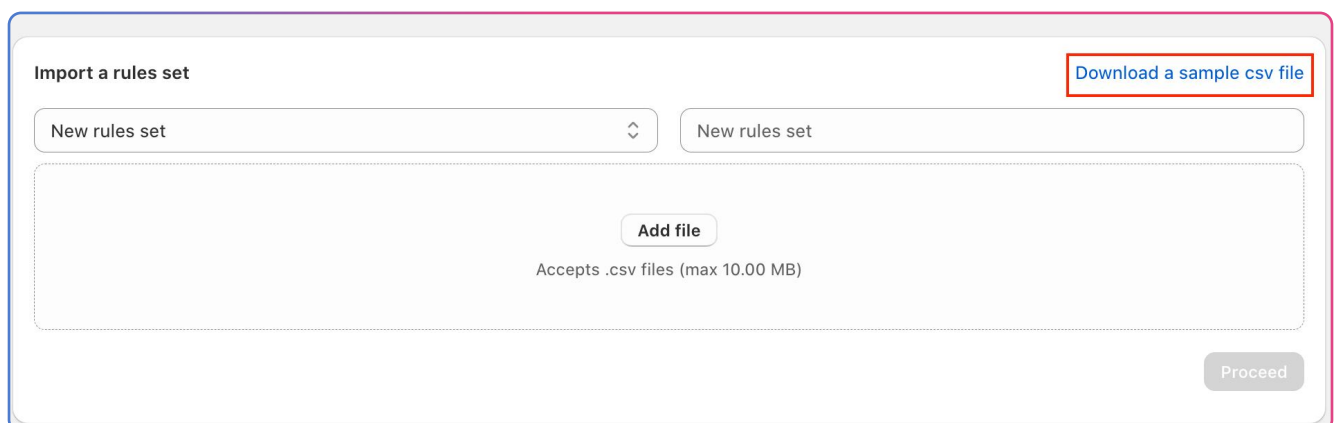
Follow these steps to create your pricing rules:

Downloading the sample csv file

The sample CSV file is the base of your pricing rules. You will be able to download it and modify it according to your needs. To download the file:

Steps

- 1 Go to **Import**.
- 2 Click **Download a sample csv file**.



Import a rules set

Download a sample csv file

New rules set

New rules set

Add file

Accepts .csv files (max 10.00 MB)

Proceed

Once you downloaded the file, simply use either a **spreadsheet** application (Excel), a **code editor** (VS Code) or **Windows' NotePad** to edit it.

Filling in the CSV file

You will need to fill the following information about your pricing rules in the csv file:

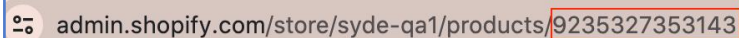
Id

The id of a product is the unique identifier assigned to a specific product.

To know the ID of a product of your store:

Steps

- ① Go to the Products section.
- ② Select the product you want to apply custom prices and go to the product page.
- ③ In the URL, select the numbers after /products/.



admin.shopify.com/store/syde-qa1/products/9235327353143

SKU

The SKU (stock keeping unit) is a unique alphanumeric code of a product. If you don't have the id of the product, you can fill in the SKU.

To know the SKU of a product of your store:

Steps

- ① Go to the Products section.
- ② Select the product you want to apply custom prices.
- ③ In the Inventory section, copy the SKU.



Inventory Adjustment history

SKU (Stock Keeping Unit) Barcode (ISBN, UPC, GTIN, etc.)

Track quantity



- ④ Paste the SKU in the SKU column of the file.

| # | sku | title |
|---|--------------|-------|
| | sku-hosted-1 | |
| | | |

Title

The title section corresponds to the name you want to give to your rule. This title will be displayed on the cart and the checkout page.

Your cart

| PRODUCT | TOTAL |
|---|-----------------------------|
|  <p>Brown Teddy Bear €45,99 €30,00</p> <p>Brown Teddy Bear Rule</p> <p>- 1 + </p> | <p>€45,99</p> <p>€30,00</p> |

Brown Teddy Bear €45,99


BROWN TEDDY BEAR RULE (-€15,99) €30,00

Discount code or gift card

Subtotal €30,00

Shipping Enter shipping address

Total EUR **€30,00**

 **TOTAL SAVINGS €15,99**

Context

Product sku or variant id: Country:

Segment: Date:

⚠ No rules for this product

Brown Teddy Bear TB39723
25,99 €

In the title column of the file, type the name.

If you don't write any name for a rule, the name of the rules set will be used.

| sku | title |
|--------------|-----------------------|
| sku-hosted-1 | brown teddy bear rule |

Priority

The priority of the rule refers to the order in which that rule will be applied.

1 is the highest priority.

| title | priority |
|-----------------------|----------|
| brown teddy bear rule | 1 |

When two different rules apply on the same product and have the same priority, the rule with the highest promotion, resulting in the lowest price, will apply in priority.






Segment

The segment section refers to a group of customers that meet specific criteria of filters determined by the merchant.

To create a customer segment on your store:

Steps

- ① Go to **Customers > Segments**.
- ② Click **Create segment**.
- ③ **Apply** criteria and click **Save segment**.
- ④ **Choose a name** for the segment and click **Save**.

| Segments | | | | | Create segment |
|--|----------------|-------------------------|---|-----|----------------|
| <input type="text" value="Search segments"/> | | | | | |
| <input type="checkbox"/> Name | % of customers | Last activity ↓ | Author | | |
| <input type="checkbox"/> Customers who have purchased at least once | 0% | Created on Feb 20, 2024 |  Shopify | ... | |
| <input type="checkbox"/> Email subscribers | 0% | Created on Feb 20, 2024 |  Shopify | ... | |
| <input type="checkbox"/> Abandoned checkouts in the last 30 days | 17% | Created on Feb 20, 2024 |  Shopify | ... | |
| <input type="checkbox"/> Customers who have purchased more than once | 0% | Created on Feb 20, 2024 |  Shopify | ... | |
| <input type="checkbox"/> Customers who haven't purchased | 100% | Created on Feb 20, 2024 |  Shopify | ... | |

To integrate a segment in the csv file, simply enter the name of the segment in the segment column.

| priority | segments |
|----------|-----------------------|
| 1 | number_of_orders >= 1 |
| | |
| | |

Customers

You can choose if you want your rule to apply to all customers or only customers logged in to your store.

For the rule to be applied to anyone, leave the box empty.

For the rule to apply to all customers logged in to your store: enter "LOGGED_IN_CUSTOMERS".

| segments | customers | collections |
|-----------------------|---------------------|-------------|
| number_of_orders >= 1 | LOGGED_IN_CUSTOMERS | |
| | | |
| | | |

Market

You can select the market where the rule will be applied. To create a market:

Steps

- ① Go to **Settings > Markets**.
- ② Click **Add market**.
- ③ Enter **a name for the market** and **select a country** in the list.
- ④ Click **Add market**.

To target a market, you have to enter the name you choose for the market in the csv file.

| | |
|-------------|---------|
| | |
| collections | markets |
| | Italy |

From date

Enter the beginning date in the following format: Y-M-D.

To date

Enter the end date in the following format: Y-M-D.

| | from_date | to_date |
|--|-----------|------------|
| | 4/16/2024 | 08/03/2025 |
| | | |
| | | |
| | | |

Type

Five different types of discount rules can be applied.

Absolute price

The Absolute Price discount replaces the original price by the value defined in your rule in your CSV file.

~~€4.678,00~~ €24,00

Amount on the original price

The Amount on the final Price discount subtracts the value defined in your rule from the original price.

JCBZ786;discount-1test;1;;;fr;2024-04-18;2025-08-31;AMOUNT_PRICE;24

Amount on the final price

A final price of a product means that a Shopify discount has already been applied to the product. The Amount on the final Price discount subtracts the value defined in your rule from the final price.

Percentage on the original price

The Percentage on the final price or Percentage_Compare_Price in the CSV file means that the percentage entered as a value applied to the original price.

Type

Percentage on the final price

In the following example, the original price is 89.795€, a 24% discount is applied and the final price is 68.244,20€.

~~€89.795,00~~ €68.244,20

Percentage on the final price

A final price of a product means that a Shopify discount has already been applied to the product. The Percentage on the final price or Percentage_Compare_Price in the CSV file means that the percentage entered as a value applied to the final price.

Value

The value entered in the value column of your CSV file when creating your rule.

The value can be either in the currency of the market in question or in percentage.

Value

24%

Select the type of rules set

When creating a rules set, you need to choose between importing a new rules set or an existing rules set.

New Rules Set

If you are importing a new rules set, you have to enter a name for the rules.

Steps

- ① Go to **Import**.
- ② In the left box, select **New rules set**.
- ③ In the right box, enter the name of the rules set.

Existing Rules Set

If you are importing an existing rules set, you will erase and replace the previous rules by the new ones you are importing.

Steps

- ① Go to **Import**.
- ② In the left box, **select the rules** set you want to update.

Importing the csv file

To import your csv file:

Steps

- 1 Go to **Import**.
- 2 Click **Add file** and **select the sample csv file** you filled.
- 3 Click **Proceed**.

The screenshot shows a web interface for importing a rules set. At the top left, it says "Import a rules set" and at the top right, there is a link "Download a sample csv file". Below this, there are two input fields: "New rules set" with a dropdown arrow and "Rule 1". A large dashed border contains an "Add file" button and the text "Accepts .csv files (max 10.00 MB)". Below this area, a light blue bar displays a file upload notification: "import-sample (4).csv - 1.77 KB - File ready to proceed". In the bottom right corner of the interface, there is a dark "Proceed" button.

View the Import

After importing your csv file, you can review the state of your import.

Last import executed on **4/18/2024 4:22:25 PM** Rules set: **brown-teddy-bear** 1 product updated Completed

In this example, all the rules have been imported.

Last import started on **4/24/2024 1:04:18 PM** Rules set: **rule 1** Completed

| Line | Product Id | SKU | Message |
|----------|------------|---------|---|
| ❗ 2 to 4 | - | SKU24SG | A market ID or handle is invalid Value: European Union |
| ❗ 5 to 8 | - | - | The ID or the SKU is required |

< >

Page 1 - 2 errors

In this example, you are able to see which rules have not been imported and why.

Last import started on **4/25/2024 4:49:35 PM** Rules set: **bear** Failed

| Line | Product Id | SKU | Message |
|------|------------|-----|-----------------------------------|
| ❗ 29 | | | A record has inconsistent columns |

< >

1 error

In this example, the import failed. You have information about the line containing the error and the type of error in the **Message** column.

Information

Line

This column shows which lines are affected by the error.

Product id

This column gives information about the id of the product concerned by the error.

SKU

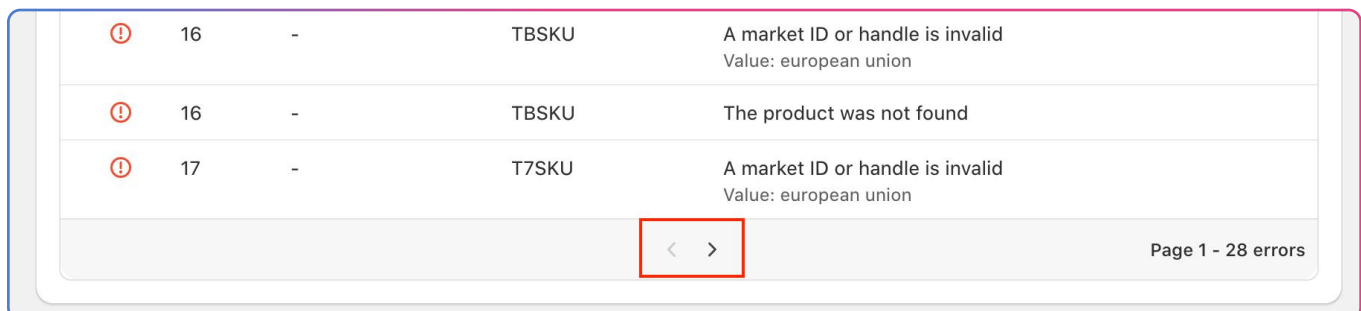
This column gives information about the SKU of the product concerned by the error.

Message

The message column indicates the type of error.

Grid pager

The grid pager allows you to navigate through the different errors in your csv file.



| | | | | |
|---|----|---|-------|---|
| ❗ | 16 | - | TBSKU | A market ID or handle is invalid Value: european union |
| ❗ | 16 | - | TBSKU | The product was not found |
| ❗ | 17 | - | T7SKU | A market ID or handle is invalid Value: european union |

< >

Page 1 - 28 errors

Testing a rules set

Once imported, you can check the rules applied to one product using its SKU or ID.

Steps

- 1 Go to **Sales Genius > Test Rules**.

Context

Product sku or variant id

Country

Segment

Date

Run the test

- 2 Enter the **SKU** or the **ID** of your product.
- 3 Choose the **country** in which you want the rules of your product to be tested.
- 4 Choose the **segment** on which you want the rules of your product to be tested.
→ Select “not logged in customers” if you don’t want to test on any particular segment.
- 5 **Type** the date or use the calendar to select the date you want to test your product.
- 6 Click on **Run the test**.

You get a preview of your product with a list of rules ranked by priority. The rule’s line applying is in bold green.

Context

Product sku or variant id


Country

Segment

Date

Run the test

✓ Rules processed successfully



Brown Teddy Bear
TB39723

~~463,00 \$MX~~ **457,01 \$MX**

3 product rules found

| Status | Priority | Label | Type | Value | Market | Segment | Customer | Start date | End date | Previous price | New price | Comment |
|--------|----------|-------------------|---------------------------|------------|----------|---|----------|------------|-----------|------------------------|--------------------|---------------------|
| ✓ | 1 | mexico-discount | Amount on the final price | -5,99 \$MX | Mexico | Customers who haven't purchased | - | 4/18/2024 | 7/12/2025 | 463,00 \$MX | 457,01 \$MX | Rule applied |
| ⚠ | 1 | colombia-discount | Amount on the final price | -4,99 \$MX | Colombia | Customers who have purchased more than once | - | 4/18/2024 | 7/12/2025 | - | - | Rule skipped |
| ⚠ | 1 | france-discount | Amount on the final price | -3,99 \$MX | France | Email subscribers | - | 4/18/2024 | 7/12/2025 | - | - | Rule skipped |

Note: The currency displayed is automatically the currency of the market selected.

If no rule is applied to your product, you will get a message “No Rules for this product”

Testing criteria

The Test Rule feature offers testing criteria that allow to accurately test a product based on a specific market/customer segment or date.

Product SKU or variant ID

In order to test rules, it is mandatory to enter either the SKU or the ID of the product you want to test. The SKU and ID are to identify your product.

Country

In order to test your product you have to choose a country in which price rules are applied.

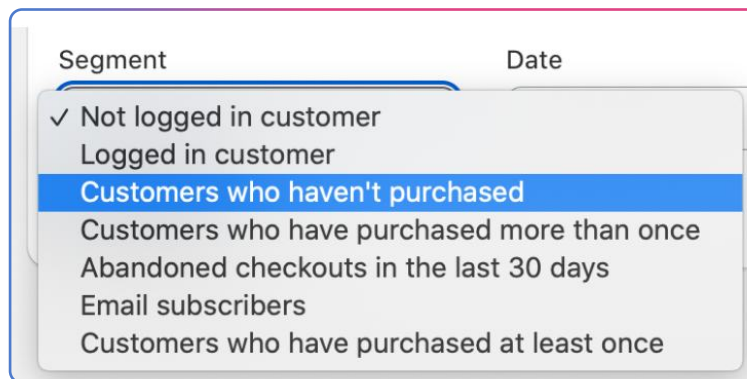
To test the product on a market involving multiple countries, choose one of the countries part of the market.

Segment

In order to test your product, you need to select a specific segment where the price rules will be applied.

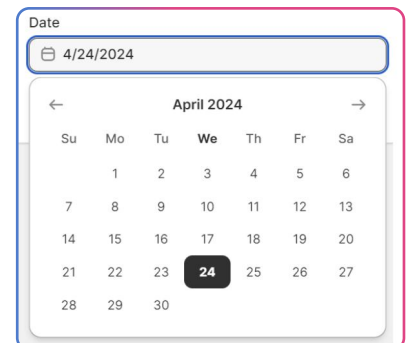
If you don't have a segment or your rules don't apply to any segment, you can simply choose the "Not logged in customers" option.

When creating your rules in your CSV file, if you leave the segment column blank the "Not Logged In" option will be applied by default.



Date

The Test Rules feature's goal is to test your rules based on specific criteria. The product tested will give the rules relevant only for the day selected in the **Date** section.



Rules information

When testing a product, a table gathering all the information regarding rules applied to the tested product is displayed. Each row concerns a rule applied or not to the product.

| 3 product rules found | | | | | | | | | | | | |
|-----------------------|----------|-------------------|---------------------------|---------|----------|---|----------|------------|-----------|----------------|-----------|--------------|
| Status | Priority | Label | Type | Value | Market | Segment | Customer | Start date | End date | Previous price | New price | Comment |
| ⚠ | 1 | mexico-discount | Amount on the final price | -5,99 € | Mexico | Customers who haven't purchased | - | 4/18/2024 | 7/12/2025 | - | - | Rule skipped |
| ⚠ | 1 | colombia-discount | Amount on the final price | -4,99 € | Colombia | Customers who have purchased more than once | - | 4/18/2024 | 7/12/2025 | - | - | Rule skipped |
| ✓ | 1 | france-discount | Amount on the final price | -3,99 € | France | Email subscribers | - | 4/18/2024 | 7/12/2025 | 25,99€ | 22,00 € | Rule applied |

Status

The status column informs you the status of your product rules.

There are three possible status:



Your rule is skipped because either the market, segment or date doesn't correspond to your testing criteria. The column in red is the reason the rule is skipped.

A Rule could not be applied for various reasons such as:

- Priority (Rule with the highest priority is applied)
- Market (Rule apply on the market on which the product is tested)
- Segment (Rule apply on the segment on which the product is tested)
- Date (Rule apply to the date on which the product is tested)



Your rule was applied



Your rule is skipped because the new price is higher than the price calculated by a previous rule.

Your rule is skipped because a rule with a higher priority is applied.

Priority

In the Priority column, you will see the priority chosen when creating your rules in your CSV files.

The priority has an impact on the application of your rules.

The highest priority is 1, it means when assigning a priority 1, your rule will override all other rules that correspond to the same criteria in terms of segment, market and date.

When two rules have the same criteria and priorities, the one with the biggest promotion is applied.

Label

The Label column corresponds to the name assigned to your rule in your CSV file.

Type

The Type column informs you on the type of discount chosen for each rule.

5 different types of discounts exist:

Absolute price

The Absolute Price discount replaces the original price by the value defined in your rule in your CSV file.

```
;JCBZ786;discount-1test;1;;;fr;2024-04-18;2025-08-31;ABSOLUTE_AMOUNT;24
```

~~€4.678,00~~ €24,00

Amount on the original price

The Amount on the original Price discount subtracts the value defined in your rule from the original price

```
;JCBZ786;discount-1test;1;;;fr;2024-04-18;2025-08-31;AMOUNT_PRICE;24
```

Amount on the final price

A final price of a product means that a Shopify discount has already been applied to the product. The Amount on the final Price discount subtracts the value defined in your rule from the final price.

Percentage on the original price

The Percentage on the final price or Percentage_Compare_Price in the CSV file means that the percentage entered as a value applied to the original price.

In the following example, the original price is 89.795€, a 24% discount is applied and the final price is 68.244,20€.

```
;LJSH79S;discount-test;1;;;fr;2024-04-18;2025-08-31;PERCENTAGE_COMPARE_AT_PRICE;24
```

~~€89.795,00~~ €68.244,20

Percentage on the final price

A final price of a product means that a Shopify discount has already been applied to the product. The Percentage on the final price or Percentage_Compare_Price in the CSV file means that the percentage entered as a value applied to the final price.

Value

The value entered in the value column of your CSV file when creating your rule.

The value can be either in the currency of the market in question or in percentage.

Market

The market(s) relevant to the rule.

Segment

The segment(s) relevant to the rule.

Customer

The customer column indicated the option chosen when creating the rule:

All customers

Every customer will be able to see the discount.

All customers logged in

Only customers logged in will see the discount.

Note: When testing a rule selection the “Customer” option between logged in and not logged in is done in the segment drop-down list.

If the customer field in your CSV file is empty, the rule will automatically apply to every customer logged-in or not.

This means you cannot test a rule combining a logged in customer segment and another segment.

Start date

The **from_date** field entered in the rule.

End date

The **to_date** field entered in the rule.

Previous price

This row displays the price before the discount.

New price

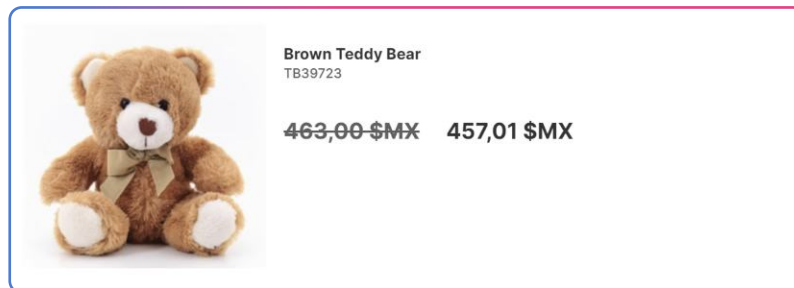
This row displays the price after the discount.

Comment

This row displays if the rule was applied or skipped.

The rule is applied

If the rule is applied, the discount from my rule is displayed in the preview window.



The rule is skipped

My rule is not applied due to either:

- Priority
- Market
- Segment
- Start/End Date

Managing a rules set

In the Rules section, you can see all the rules you imported.

Search bar

You can search for a rule, a rules set or a product with the search bar.

Steps

- ① Go to the Rules section.
- ② Click on the magnifying glass.
- ③ Enter your search.

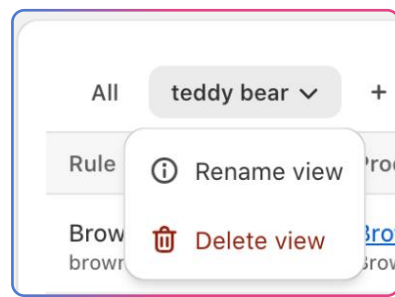
Add a search filter as a view

Steps

- ① Go to the Rules section.
- ② Click on the magnifying glass.
- ③ Enter your search.
- ④ Click Save as.
- ⑤ Enter the name of the view and click Save.

Your new view is now displayed.

To rename or delete a view, click on the arrow appearing when you select a view.



Grid paging

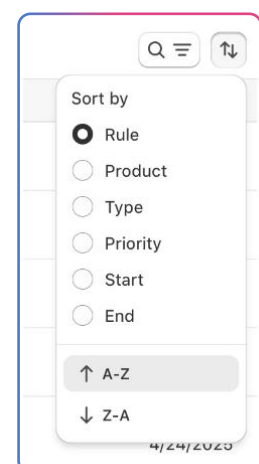
Use the grid pager at the bottom of the table to navigate between pages.

| | | | | | |
|-----------------|--|---|-------------------------------|-----|--------|
| Rule 2 73(2) | The Videographer Snowboard The Videographer Snowboard - Default Title | 1 | Percentage on the final price | 38% | France |
| Rule 2 73(2) | The Videographer Snowboard The Videographer Snowboard - Default Title | 1 | Percentage on the final price | 38% | France |

Sorting criteria

You are able to sort the table according to different criteria by alphabetical or non-alphabetical order:

- Rule
- Product
- Type
- Priority
- Start
- End



Information

In the Rules table, you have access to multiple information about your rules.

Rule

You can see the name of the rules.

The text in the red square corresponds to the title of the rule written in the csv file.

The text in the green square corresponds to the name of the rules set you enter when importing a csv file.

| Rule |
|-----------------------|
| Brown Teddy Bear Rule |
| brownteddybearrule |

Product

In the product column, you have access to the name of the product as it is in your store.

Priority

You can see the priority of the product. Learn more about the priority [here](#).

Type

The Type column informs you on the type of discount chosen for each rule. Learn more about the discounts [here](#).

Modifier

The modifier refers to the change applied to the base price of the product.

Market

You can view the market on which the rule applies. Learn more about markets [here](#).

Segment

You can view the customer segments on which the rule is applied. Learn more about segments [here](#).

Start/End

You can view the start date and the end date of the rule's application.

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