

Personal promotions

“ **You need:** *Customer promo manager* — *view* to browse, ... — *edit* to change. Importing needs *Personal promotions* — *import*, separate again.

A personal promotion attaches an existing offer to a **specific customer**. Where a promotional code is something any customer can enter, this is granted to one person.

What you can attach

The **available promos** view lists what can be attached for a given store. It is deliberately not the full catalogue — it shows offers that are:

- **hidden** — not publicly advertised, meant to be granted individually;
- **manually added** — designed for exactly this purpose;
- **not expired**.

“ If an offer you expect isn't in the list, it is usually one of those three: it is a public offer rather than a grantable one, or it has expired. That is the list doing its job, not a missing record.

Browsing existing records

Search customer promo records to see what a customer already has, or to review what was granted in a campaign of individual grants.

Granting one

1. Find the offer under available promos for the relevant store.
2. Create the record against the customer.
3. Set the dates it is valid between.

For many customers at once, import a phone list instead — see [Importing from a CSV](#).

Changing and removing

Action	Applies to	Note
Update dates	Non-redeemed records only	Extend or shorten validity
Delete	Non-redeemed records only	Removes the grant entirely

Both are limited to records the customer hasn't used. Once redeemed, a personal promotion is part of that customer's history and stays.

To withdraw an offer a customer has *not* used, shortening the dates is gentler than deleting: the record survives, so there is an answer if they ask.

Bulk changes

Personal promotions follow the standard pattern — read [How bulk changes work](#) first.

Here the criteria are a **promo or offer code**: you are acting on every record granting that particular offer.

Operation	Effect
Check	Counts records matching the promo/offer code
Bulk update	Changes the start and end dates on every matching non-redeemed record
Bulk delete	Removes every matching non-redeemed record

This is how you correct a grant campaign that went out with the wrong dates, without touching customers who already used theirs.

Choosing between this and a promotional code

	Personal promotion	Promotional code
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Who can use it	One named customer	Anyone with the code
How they get it	Granted to them	They enter a code
Good for	Win-back, VIP treatment, service recovery	Public campaigns

If you find yourself granting the same offer to hundreds of customers individually, a campaign with coupons is probably the better tool — see [Promotional codes](#).

Related pages

- [How bulk changes work](#) — before any bulk operation
- [Importing from a CSV](#) — granting from a phone list
- [Promotional codes](#) — the public-campaign alternative