

AP Commerce Inc.

Advanced Sales Promotion


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Installation & Setup

The Advanced Sales Promotion app is installed per company. To enable and initialize the app, use the Assisted Setup wizard.

Setup the Advanced Sales Promotion App

1. Choose the  icon that opens the **Tell Me** feature, enter **"Users"** and click on the related link to open the **Users** list.
2. On the Users list, click on the user that will perform the Advanced Sales Promotion setup and open the User Card page.
3. On the **User Card** page, go to the **User Permission Sets** tab, add the **Advanced Sales Promotion** permission set for this user.

← USER CARD | WORK DATE: 2019/4/8 🔍 + 🗑️ ✓ SAVED

Freda Cheng

[Change Web Service Key](#) |
 [Effective Permissions](#) |
 [More options](#)

Web Service Access

Office 365 Authentication >

User Groups | Manage

| CODE | NAME | COMPANY NAME |
|--------------------|-----------------------------------|------------------|
| D365 BUS PREMIUM | D365 Premium Business Access | CRONUS USA, Inc. |
| D365 EXTENSION MGT | Dynamics 365 Extension management | CRONUS USA, Inc. |
| D365 TROUBLESHOOT | D365 Troubleshoot | CRONUS USA, Inc. |

User Permission Sets | Manage

| PERMISSION SET | DESCRIPTION | COMPANY | EXTENSION NAME | PERMISSION SCOPE |
|----------------------|-------------------------------|------------------|--------------------------|------------------|
| ADVANCED SALES PROMO | Advanced Sales Promotion | CRONUS USA, Inc. | Advanced Sales Promotion | Tenant |
| D365 BUS PREMIUM | Dyn. 365 Prem. Bus. Full Acc. | CRONUS USA, Inc. | | System |
| D365 EXTENSION MGT | Dynamics 365 Extension Mgt. | CRONUS USA, Inc. | | System |
| LOCAL | Country/region-specific func. | CRONUS USA, Inc. | | System |
| TROUBLESHOOT TOOLS | Troubleshoot Tools | CRONUS USA, Inc. | | System |

4. Go back to the Home Page, click **the Setup & Extensions** dropdown.
5. Click the **Assisted Setup**
6. Click the Set up **Advanced Sales Promotion** link.

Assisted Setup: All ▾ | Search | Open in Excel | More options

| NAME | STATUS |
|--|---------------|
| Migrate business data | Not Completed |
| Set up cash flow forecast | Not Completed |
| Set up approval workflows | Not Completed |
| Set up a customer approval workflow | Not Completed |
| Set up email | Not Completed |
| Set up email logging | Not Completed |
| Set up your Business Inbox in Outlook | Not Completed |
| Set up reporting data | Not Completed |
| Set up an item approval workflow | Not Completed |
| Set up a payment approval workflow | Not Completed |
| Set up Dynamics 365 for Sales connection | Not Completed |
| Set up VAT | Not Completed |
| Invite External Accountant | Not Completed |
| Set up consolidation reporting | Not Completed |
| Set up Intelligent Cloud | Not Completed |
| Set up Advanced Sales Promotion | Not Completed |

7. This will launch the wizard for this process

ADVANCED SALES PROMOTION SETUP WIZARD ↗ ✕

CUSTOMER DETAILS

Provide your company details

| | |
|---------------------|---------------------------|
| Name | CRONUS International Ltd. |
| Address | 5 The Ring |
| Address 2 | Westminster |
| City | London |
| County | |
| Post Code | W2 8HG |
| Country/Region Code | GB |
| Phone No. | 0666-666-6666 |
| Email | info@cronus.com |

8. On the **Customer Details** step, customer information will default to the current company information.

9. Check and modify customer information as needed.

10. Click **Next**

11. On the **Number Series** step, choose a **No. Series** for Promotion No.

If this field is left blank, a **No. Series** of "**S-PROMO**" will be created and filled into the No. Series field by the setup wizard.

ADVANCED SALES PROMOTION SETUP WIZARD



NUMBER SERIES

Please choose No. Series for Pormotion No. Leaving it empty will create default No. Series.

Promotion Nos.

12. Click **Next**

13. On **All Done** Step, Click **Finish** to complete setup.

ADVANCED SALES PROMOTION SETUP WIZARD

**ALL DONE**

Click on Finish to initialize the app. Thank you for choosing the Advanced Sales Promotion app!

Back

Next

Finish

14. After setup wizard is closed, a confirmation window will pop up to connect to the external service Stripe.com for subscription synchronization. Please choose **Allow Always** and then click **OK**.




The extension 'Advanced Sales Promotion by AP Commerce Inc.' is making a request to an external service. Do you want to allow this request?



- Allow Always
- Allow Once
- Block Always
- Block Once

OK

Cancel

Modify the Advanced Sales Promotion Setup

1. Choose the  icon that opens the **Tell Me** feature, enter "promotion setup", and then choose the **Advanced Sales Promotion Setup** link to open the setup page.



TELL ME WHAT YOU WANT TO DO  

promotion setup

Go to Pages and Tasks

| | | |
|----------------------|---|----------------|
| > | Advanced Sales Promotion Setup | Administration |
| > | Advanced Sales Promotion Subscription Setup | Administration |

2. On **Advanced Sales Promotion Setup** page, users may change **Promotion Nos.** if needed.



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✓ SAVED 

Advanced Sales Promotion Setup

Number Series

Promotion Nos. S-PROMO 

Setup the Advanced Sales Promotion Subscription

1. Choose the  icon that opens the **Tell Me** feature, enter "promotion setup", and then choose the **Advanced Sales Promotion Subscription Setup** link to open the setup page.

TELL ME WHAT YOU WANT TO DO



promotion setup

Go to Pages and Tasks

- > [Advanced Sales Promotion Setup](#) Administration
- > [Advanced Sales Promotion Subscription Setup](#) Administration

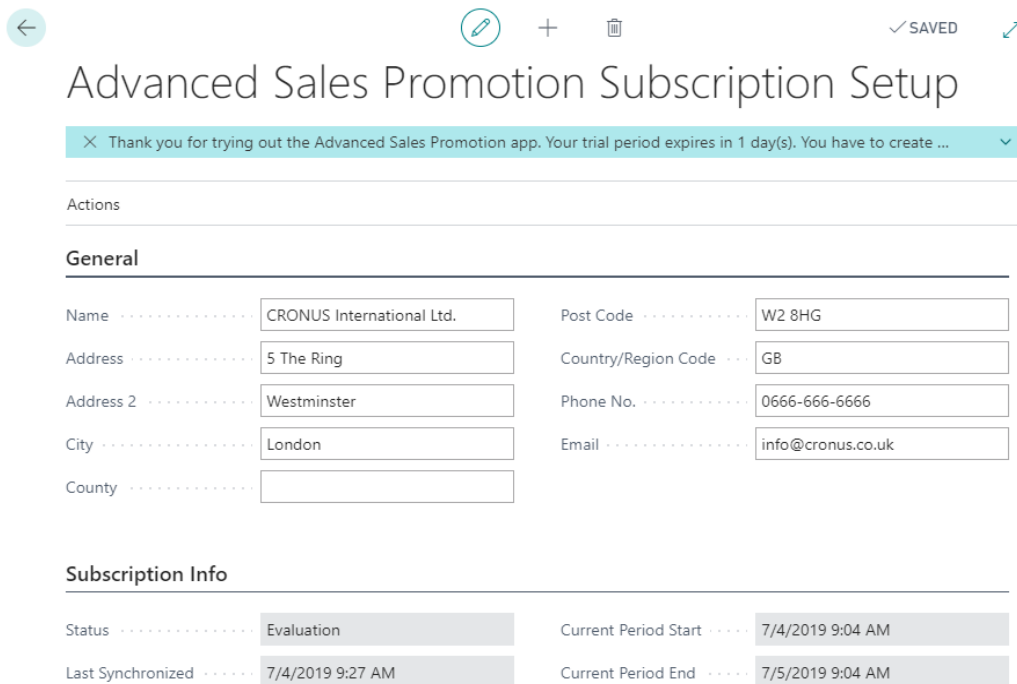
2. On **Advanced Sales Promotion Subscription Setup** page, it contains two fast tabs:

General

Users may modify contact/subscription information in the **General** tab.

Subscription Info

This section will show subscription status and subscription period information. These fields are non-editable and will be automatically updated by app provider.



← [edit] + [trash] ✓ SAVED [share]

Advanced Sales Promotion Subscription Setup

× Thank you for trying out the Advanced Sales Promotion app. Your trial period expires in 1 day(s). You have to create ...

Actions

General

| | | | |
|-----------|---------------------------|---------------------|-------------------|
| Name | CRONUS International Ltd. | Post Code | W2 8HG |
| Address | 5 The Ring | Country/Region Code | GB |
| Address 2 | Westminster | Phone No. | 0666-666-6666 |
| City | London | Email | info@cronus.co.uk |
| County | | | |

Subscription Info

| | | | |
|-------------------|------------------|----------------------|------------------|
| Status | Evaluation | Current Period Start | 7/4/2019 9:04 AM |
| Last Synchronized | 7/4/2019 9:27 AM | Current Period End | 7/5/2019 9:04 AM |

Subscription


Subscription Status

On Advanced Sales Promotion Subscription Setup page, Subscription Info section, subscription Status field has the following values:

- **Evaluation:** This means the app is in a trial period. The Advanced Sales Promotion app has a 15-day trial period. The period starts counting the day the app has been installed.
- **Active:** This means the app is authorized for use in the current company. Your subscription is within the effective period. The Advanced Sales Promotion app can be subscribed to yearly. The status will change to **Active** after payment has been received. The “Current Period Start/Current Period End” fields will be automatically renewed to 1- year period after payment has been verified.
- **Past Due:** This means the app is not within a valid period. Once the trial period has expired, and no subscription has been created or the payment has failed after processing, the app function will be blocked, and the **Status** value will be changed to **Past Due**.
- **Canceled:** This means the app was subscribed using card payment, but the subscription has been canceled manually by the users. The **Status** value will be changed to **Canceled** at the end of the current effective period. Users can create a subscription again per the above instructions on how to use the app.
- **Unpaid:** This means the payment renewal has failed. The app function will be blocked, and the **Status** will change to **Unpaid**.
- **Blocked:** When new companies are created through copy company function, the Advanced Sales Promotion app will be automatically installed, and **Status** will be set to **Blocked**. Users must run **Set up Advanced Sales Promotion** from **Assisted Setup** to register the current company as a new customer before starting use.

When the trial period has ended, **Status** will be changed from **Evaluation** to **Active** temporarily for users to process their payment. If the payment has not been made within a couple of hours, then the **Status** will be changed to **Past Due**.



Create subscription by credit card payment

1. Choose the  icon that opens the **Tell Me** feature, enter “promotion setup”, and then choose the **Advanced Sales Promotion Subscription Setup** link to open the setup page.
2. On Advanced Sales Promotion Subscription Setup page, click the **Actions** dropdown menu.

←  +  ✓ SAVED 

Advanced Sales Promotion Subscription Setup

Actions



-  Create Subscription
-  Create Subscription Manually
-  Cancel Subscription


| | | | |
|-----------------|--|---------------------------|--|
| Name | <input type="text" value="CRONUS International Ltd."/> | Post Code | <input type="text" value="W2 8HG"/> |
| Address | <input type="text" value="5 The Ring"/> | Country/Region Code | <input type="text" value="GB"/> |
| Address 2 | <input type="text" value="Westminster"/> | Phone No. | <input type="text" value="0666-666-6666"/> |
| City | <input type="text" value="London"/> | Email | <input type="text" value="info@cronus.co.uk"/> |
| County | <input type="text"/> | | |

Subscription Info

| | | | |
|-------------------------|---|----------------------------|---|
| Status | <input type="text" value="Evaluation"/> | Current Period Start | <input type="text" value="7/4/2019 9:04 AM"/> |
| Last Synchronized | <input type="text" value="7/4/2019 9:27 AM"/> | Current Period End | <input type="text" value="7/5/2019 9:04 AM"/> |

3. Click **Create Subscription** to launch the wizard for this process.

CREATE SUBSCRIPTION TO ADVANCED SALES PROMOTION  



CUSTOMER DETAILS

Provide your company details

| | |
|---------------------------|--|
| Name | <input type="text" value="CRONUS International Ltd."/> |
| Address | <input type="text" value="5 The Ring"/> |
| Address 2 | <input type="text" value="Westminster"/> |
| City | <input type="text" value="London"/> |
| County | <input type="text"/> |
| Post Code | <input type="text" value="W2 8HG"/> |
| Country/Region Code | <input type="text" value="GB"/> |
| Phone No. | <input type="text" value="0666 666 6666"/> |

4. The wizard will automatically import the data from the Company Information. You can modify or confirm the payment information, and

then click **Next**.

5. Enter Credit Card information. Please enter card number, expiration month/year, and CVC code.

CREATE SUBSCRIPTION TO ADVANCED SALES PROMOTION



CREDIT CARD DETAILS

Please fill in your credit card details below. They will be safely stored with our payment provider Stripe. No credit card information will be stored in Dynamics 365.

 Card number

MM / YY CVC

Back

Next

Finish

6. Click **Next**.

CREATE SUBSCRIPTION TO ADVANCED SALES PROMOTION



CREDIT CARD DETAILS

Please fill in your credit card details below. They will be safely stored with our payment provider Stripe. No credit card information will be stored in Dynamics 365.

 4242 4242 4242 4242

12 / 25 666

Back

Next

Finish

7. Click **Finish** to create the subscription and close the wizard.

CREATE SUBSCRIPTION TO ADVANCED SALES PROMOTION



ALL DONE

Click on Finish to create your subscription. Thank you for choosing the Advanced Sales Promotion app!

Back

Next

Finish

The Advanced Sales Promotion Subscription Setup page will be updated with the renewed subscription message. The subscription status will automatically update when current period ends.

←
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✓ SAVED ↗

Advanced Sales Promotion Subscription Setup

✕ Thank you for subscription to the Advanced Sales Promotion app. Your subscription will be charged and start autom...

Actions

General

| | | | |
|-----------------|---------------------------|-------------------------|-------------------|
| Name | CRONUS International Ltd. | Post Code | W2 8HG |
| Address | 5 The Ring | Country/Region Code ... | GB |
| Address 2 | Westminster | Phone No. | 0666-666-6666 |
| City | London | Email | info@cronus.co.uk |
| County | | | |

Subscription Info

| | | | |
|-------------------------|-------------------|----------------------------|------------------|
| Status | Evaluation | Current Period Start | 7/4/2019 9:04 AM |
| Last Synchronized | 7/4/2019 10:11 AM | Current Period End | 7/5/2019 9:04 AM |

Create subscription manually

1. On Advanced Sales Promotion Subscription Setup page, click the **Actions** dropdown menu.
2. Click **Create Subscription Manually**.



✓ SAVED



Advanced Sales Promotion Subscription Setup

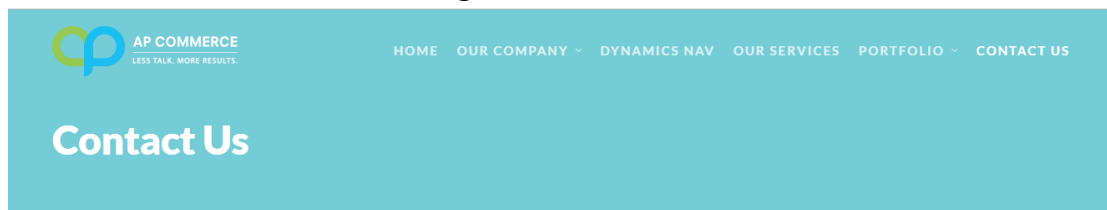
Actions

| | | | |
|-----------------|--|---------------------------|--|
| Name | <input type="text" value="CRONUS International Ltd."/> | Post Code | <input type="text" value="W2 8HG"/> |
| Address | <input type="text" value="5 The Ring"/> | Country/Region Code | <input type="text" value="GB"/> |
| Address 2 | <input type="text" value="Westminster"/> | Phone No. | <input type="text" value="0666-666-6666"/> |
| City | <input type="text" value="London"/> | Email | <input type="text" value="info@cronus.co.uk"/> |
| County | <input type="text"/> | | |

Subscription Info

| | | | |
|-------------------------|--|----------------------------|---|
| Status | <input type="text" value="Evaluation"/> | Current Period Start | <input type="text" value="7/4/2019 9:04 AM"/> |
| Last Synchronized | <input type="text" value="7/4/2019 10:11 AM"/> | Current Period End | <input type="text" value="7/5/2019 9:04 AM"/> |

- A new page will be open with browser that links to <http://www.apcommerce.com/contact-us/>. Please enter contact information and app name in the "Write a Message" text box then click **Submit**. After processing has been completed, the applicant will receive an invoice through e-mail from AP Commerce Inc.





Let us know how we can help you!

| | |
|--|---|
| <input type="text" value="Name (Required)"/> | <input type="text" value="Company Name"/> |
| <input type="text" value="Email Address (Required)"/> | <input type="text" value="Phone Number"/> |
| <input type="text" value="Write a message... (Required)"/> | |

Give us a call

US Office (HQ)

 Tel +1 (310) 388 9066
 Fax +1 (310) 388 9068

 info@apcommerce.com

Asia Office (Taiwan)

 Tel +886-2-2568-1831

 twinfo@apcommerce.com

Contact Us



Let us know how we can help you!

| | |
|-------------------|---------------|
| James Bond | Cronus |
| info@cronus.co.uk | 0666-666-6666 |

We're gonna subscribe Advanced Promotion app, could you please send me invoice for it?

SUBMIT




Give us a call

| | |
|---|---|
| US Office (HQ) | Asia Office (Taiwan) |
| Tel +1 (310) 388 9066 Fax +1 (310) 388 9068 | Tel +886-2-2568-1831 |
|  info@apcommerce.com |  twinfo@apcommerce.com |

After payment has been remitted on the invoice, the subscription will be automatically activated, and the **Status** on the Advanced Sales Promotion Subscription Setup page will be changed into **Active**.

Cancel the subscription if using card payment

1. On the Advanced Sales Promotion Subscription Setup page, click the **Actions** dropdown menu.
2. Click **Cancel Subscription**.

←  +  ✓ **SAVED** 

Advanced Sales Promotion Subscription Setup

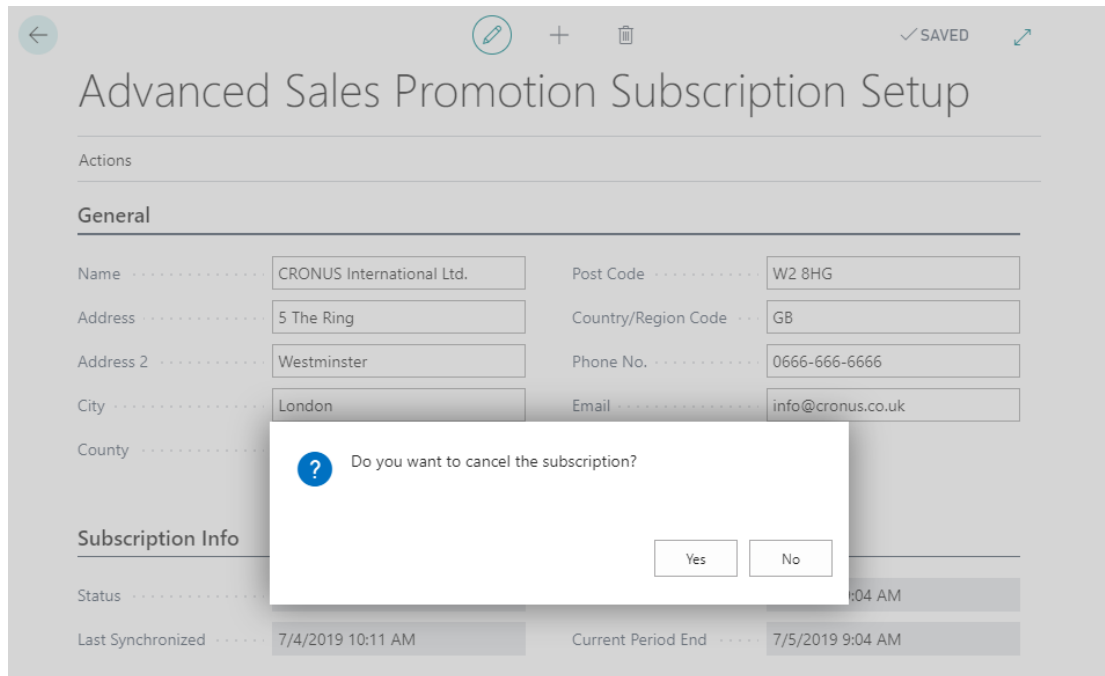
Actions

| | | | |
|-----------|---------------------------|---------------------|-------------------|
| Name | CRONUS International Ltd. | Post Code | W2 8HG |
| Address | 5 The Ring | Country/Region Code | GB |
| Address 2 | Westminster | Phone No. | 0666-666-6666 |
| City | London | Email | info@cronus.co.uk |
| County | | | |

Subscription Info

| | | | |
|-------------------|-------------------|----------------------|------------------|
| Status | Evaluation | Current Period Start | 7/4/2019 9:04 AM |
| Last Synchronized | 7/4/2019 10:11 AM | Current Period End | 7/5/2019 9:04 AM |

3. Click **Yes** when confirmation window popups.



Advanced Sales Promotion Subscription Setup

Actions

General

| | | | |
|-----------|---------------------------|---------------------|-------------------|
| Name | CRONUS International Ltd. | Post Code | W2 8HG |
| Address | 5 The Ring | Country/Region Code | GB |
| Address 2 | Westminster | Phone No. | 0666-666-6666 |
| City | London | Email | info@cronus.co.uk |
| County | | | |

Subscription Info

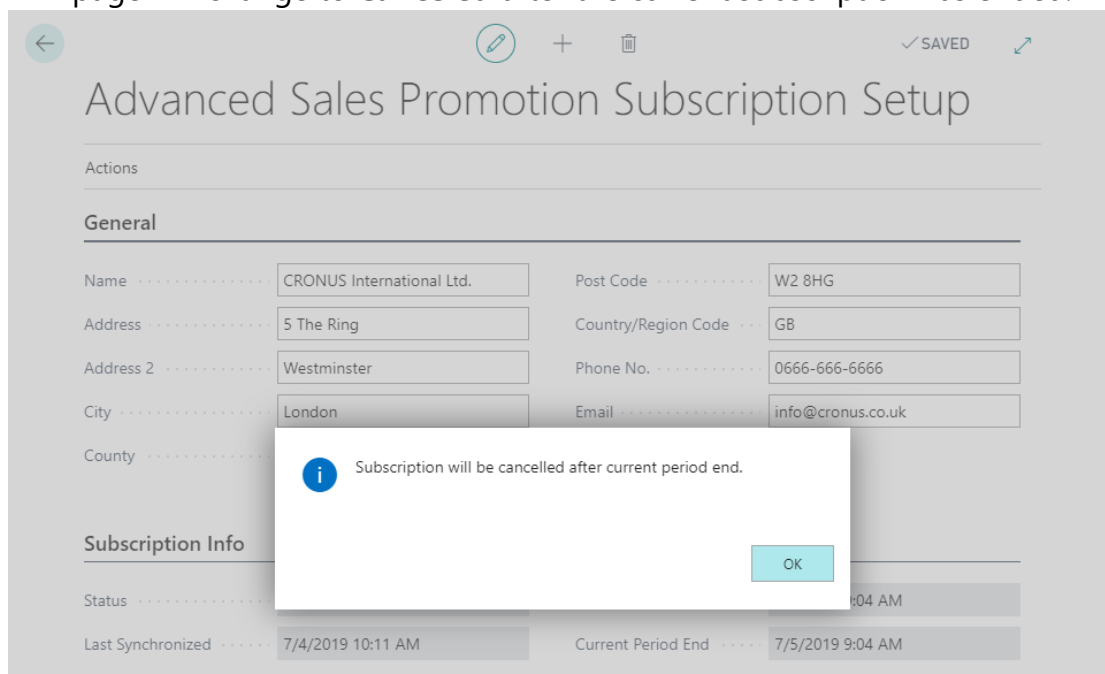
Status: [Active/Evaluation] 9:04 AM

Last Synchronized: 7/4/2019 10:11 AM Current Period End: 7/5/2019 9:04 AM

Do you want to cancel the subscription?

Yes No

After canceling the process, the subscription **Status** will stay **Active/Evaluation** till the current subscription period has ended. When the user opens the Advanced Sales Promotion Subscription Setup page, users will have a warning message on the header of the page to remind them that the subscription has been canceled. The **Status** on the setup page will change to **Canceled** after the current subscription has ended.



Advanced Sales Promotion Subscription Setup

Actions

General

| | | | |
|-----------|---------------------------|---------------------|-------------------|
| Name | CRONUS International Ltd. | Post Code | W2 8HG |
| Address | 5 The Ring | Country/Region Code | GB |
| Address 2 | Westminster | Phone No. | 0666-666-6666 |
| City | London | Email | info@cronus.co.uk |
| County | | | |

Subscription Info

Status: [Canceled] 9:04 AM

Last Synchronized: 7/4/2019 10:11 AM Current Period End: 7/5/2019 9:04 AM

Subscription will be cancelled after current period end.

OK



✓ SAVED



Advanced Sales Promotion Subscription Setup

× Thank you for trying out the Advanced Sales Promotion app. Your trial period expires in 1 day(s). You have to create ...

Actions

General

| | | | |
|-----------------|--|---------------------------|--|
| Name | <input type="text" value="CRONUS International Ltd."/> | Post Code | <input type="text" value="W2 8HG"/> |
| Address | <input type="text" value="5 The Ring"/> | Country/Region Code | <input type="text" value="GB"/> |
| Address 2 | <input type="text" value="Westminster"/> | Phone No. | <input type="text" value="0666-666-6666"/> |
| City | <input type="text" value="London"/> | Email | <input type="text" value="info@cronus.co.uk"/> |
| County | <input type="text"/> | | |

Subscription Info

| | | | |
|-------------------------|--|----------------------------|---|
| Status | <input type="text" value="Evaluation"/> | Current Period Start | <input type="text" value="7/4/2019 9:04 AM"/> |
| Last Synchronized | <input type="text" value="7/4/2019 10:18 AM"/> | Current Period End | <input type="text" value="7/5/2019 9:04 AM"/> |

User Scenarios for Promotions

Users can create promotions based on a combination of items instead of just based on the pricing or discount. Users can setup multiple promotions. The following are the most commonly used scenarios of combinations:

1. Buy 2 of item A and get 1 of item B free.
2. Buy 2 of item A and get 1 of item B with a % discount.
3. Buy 10 of item A and get free freight.
4. Buy \$200 and get free freight.
5. Buy \$5,000 of item 1 ... to item n and get gifts.
6. Buy item A and get net 60 terms.

Based on the **Condition** setting on the Promotion card, the customer will receive either discount or additional quantities of different types of resources in the **Result** section. Following types are options that can be selected for a promotion **Condition**:


- Item
- Item category
- Resource

Following types are options that can be selected for a Promotion **Result**:

- Item
- Item category
- Resource
- Shipping Agent Service
- Payment Terms

Create a Promotion

A new list page called **Promotions** is added. Users will be able to insert, delete, and edit promotions from here.

1. Choose the  icon that opens the **Tell Me** feature, enter "promotion list", and then choose the **Promotions** link to open the list page.

TELL ME WHAT YOU WANT TO DO

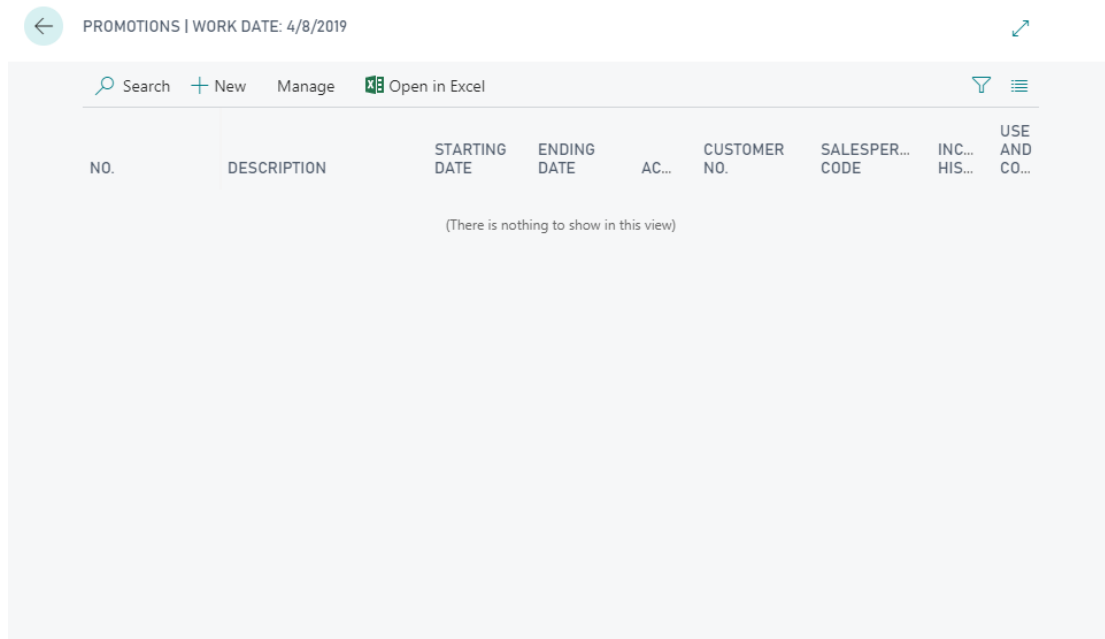


Go to Pages and Tasks

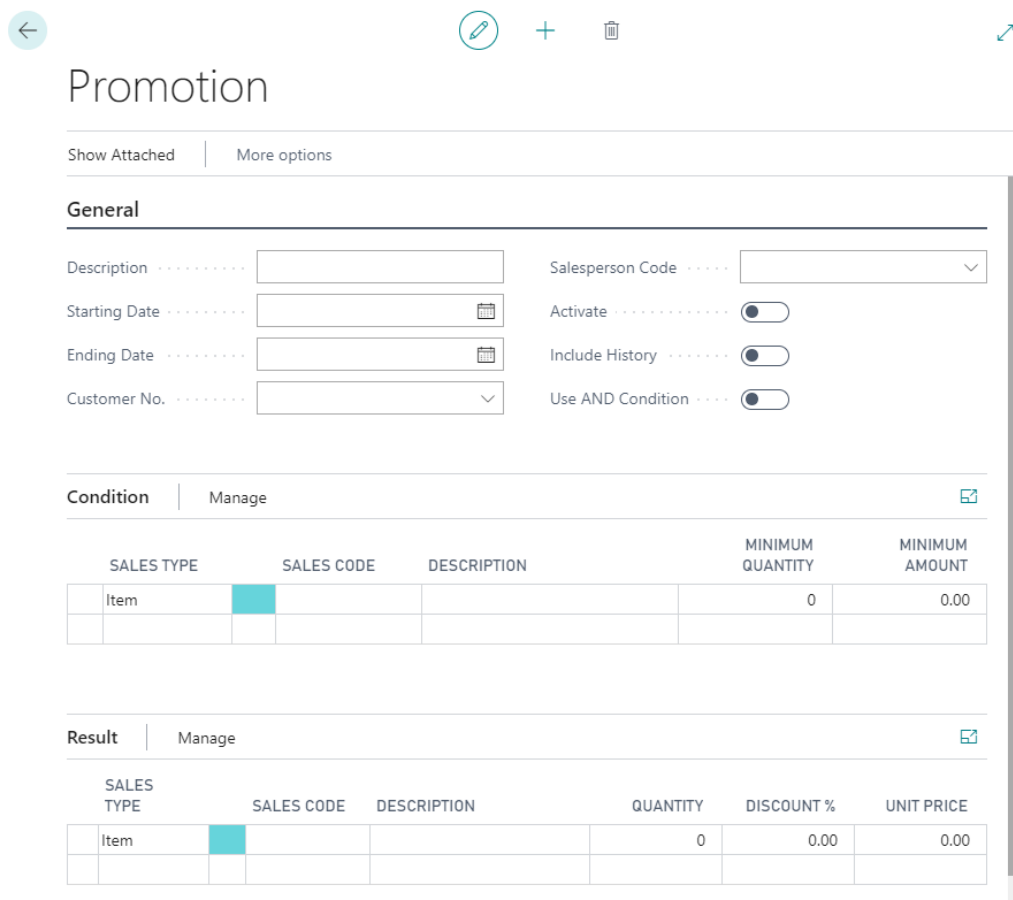
> [Promotions](#)

Lists

2. On **Promotions** list page, Click **New** to create a new promotion.



3. On the newly created **Promotion** card, users can setup different criteria on the **Condition** section and assign the desired results in the **Result** section. To setup different promotion scenarios, please refer to the following Promotion Scenarios examples.



Promotion Scenario: Buy 2 items and get 1 free

Setup Promotion Basic Information

To setup the Promotion basic information, users need to insert the Promotion data in **General** tab first:

1. **Promotion No.** field modifiability is controlled by **Manual Nos.** in **No. Series** and is initially set to automatic.
2. In the **Description** field, enter a description for the promotion, for example; **Buy 2 of item A and get 1 free of item B.**
3. Insert the **Starting Date** and **Ending Date** for the applicable period, insert **1/1/2019** as **Starting Date** and **12/31/2019** as **Ending Date** so it can be applied by existing demo sales orders.
4. Choose **Customer No.** field if this promotion is for specific customer only.
5. Choose **Salesperson Code** if this promotion is for specific salesperson only.
6. Set **Activate** to **True** so this promotion can be applied.
7. Set **Include History** to **True** if users want to sum up history for the Qty./Amount cumulation.
8. Set **Use AND Condition** to **True** so the **Condition** lines will be performed only when all the line conditions are met. If it's set to **False**, then either one of the condition line criteria is met then the Result will be performed.

← PROMOTION | WORK DATE: 4/8/2019
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✓ SAVED ↗️

PROMO000001

General

| | | | |
|---------------------|-----------------------------------|-------------------------|-------------------------------------|
| Description | Buy 2 items A and get 1 free item | Salesperson Code | ▼ |
| Starting Date | 1/1/2019 📅 | Activate | <input checked="" type="checkbox"/> |
| Ending Date | 12/31/2019 📅 | Include History | <input type="checkbox"/> |
| Customer No. | ▼ | Use AND Condition | <input type="checkbox"/> |

Condition | Manage 🔗

| | SALES TYPE | SALES CODE | DESCRIPTION | MINIMUM QUANTITY | MINIMUM AMOUNT |
|--|------------|------------|-------------|------------------|----------------|
| | Item | | | 0 | 0.00 |

Result | Manage 🔗

| | SALES TYPE | SALES CODE | DESCRIPTION | QUANTITY | DISCOUNT % | UNIT PRICE |
|--|------------|------------|-------------|----------|------------|------------|
| | Item | | | 0 | 0.00 | 0.00 |

Setup Promotion Condition

After basic information is added, users need to set conditions on the **Condition** subpage:

1. Select the **Sales Type** from the dropdown list. There is **Item**, **Item Category**, and **Resource** that can be selected. Select Sales Type = **Item** in this example.
2. In the **Sales Code** field, enter an Item No. based on the Sales Type just selected. In this example, enter as Item No. = **2000-S**.
3. The **Description** field will be automatically brought in by the **Sales Code** that is selected, users may edit the field if needed.
4. Enter **Minimum Quantity** = 2 and left **Minimum Amount** = 0. This will set the criteria to check if sales lines have quantity = 2 for the designated item, in order to fit the "Buy 2 items and get 1 free" scenario.

← PROMOTION | WORK DATE: 4/8/2019
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✓ SAVED ↗

PROMO000001

General

| | | | |
|---------------------|-----------------------------------|-------------------------|-------------------------------------|
| Description | Buy 2 items A and get 1 free item | Salesperson Code | ▼ |
| Starting Date | 1/1/2019 📅 | Activate | <input checked="" type="checkbox"/> |
| Ending Date | 12/31/2019 📅 | Include History | <input type="checkbox"/> |
| Customer No. | ▼ | Use AND Condition | <input type="checkbox"/> |

Condition | [Manage](#) 🔗

| SALES TYPE | SALES CODE | DESCRIPTION | MINIMUM QUANTITY | MINIMUM AMOUNT |
|------------|------------|----------------------------|------------------|----------------|
| Item | 2000-S | SYDNEY Swivel Chair, green | 2 | 0.00 |
| | | | | |

Result | [Manage](#) 🔗

| SALES TYPE | SALES CODE | DESCRIPTION | QUANTITY | DISCOUNT % | UNIT PRICE |
|------------|------------|-------------|----------|------------|------------|
| Item | | | 0 | 0.00 | 0.00 |
| | | | | | |

Setup Promotion Result

Follow these steps to setup a Promotion Result into the **Result** subpage:

1. Select **Sales Type** from the dropdown list. It can be various type for conditions. There is **Item, Item Category, Resource, Shipping Agent Service**, and **Payment Terms** that can be selected. Select Sales Type = **Item** in this example.
2. In the **Sales Code** field, enter an Item No. based on the Sales Type just selected. In this example, enter as Item No. = **1980-S**.
3. The **Description** field will be automatically brought in by the **Sales Code** that is selected, users may edit the field if needed.
4. Enter **Quantity** = 1. This will set the result to add additional sales line to grant Item No. **1980-S**.
5. Leave the **Discount %** field and the **Unit Price** field blank, in order to fit the "Buy 2 items and get 1 free" scenario.

← PROMOTION | WORK DATE: 4/8/2019
✎ + 🗑️
✓ SAVED ↗️

PROMO000001

General

| | | | |
|---------------------|-----------------------------------|-------------------------|-------------------------------------|
| Description | Buy 2 items A and get 1 free item | Salesperson Code | <input type="text"/> |
| Starting Date | 1/1/2019 <input type="text"/> | Activate | <input checked="" type="checkbox"/> |
| Ending Date | 12/31/2019 <input type="text"/> | Include History | <input type="checkbox"/> |
| Customer No. | <input type="text"/> | Use AND Condition | <input type="checkbox"/> |

Condition | [Manage](#)

| SALES TYPE | SALES CODE | DESCRIPTION | MINIMUM QUANTITY | MINIMUM AMOUNT |
|------------|------------|----------------------------|------------------|----------------|
| Item | 2000-S | SYDNEY Swivel Chair, green | 2 | 0.00 |
| | | | | |

Result | [Manage](#)

| SALES TYPE | SALES CODE | DESCRIPTION | QUANTITY | DISCOUNT % | UNIT PRICE |
|------------|------------|--------------------------|----------|------------|------------|
| Item | 1980-S | MOSCOW Swivel Chair, red | 1 | 0.00 | 0.00 |
| | | | | | |

After the promotion is completed, close the **Promotion** card page and it can be selected from the **Sales Order** page.

← PROMOTIONS | WORK DATE: 4/8/2019

Search + New Manage Open in Excel

| NO. | DESCRIPTION | STARTING DATE | ENDING DATE | AC... | CUSTOMER NO. | SALES PER... CODE | INC... HIS... | USE AND CO... |
|-------------|-------------------------------|---------------|-------------|-------|--------------|-------------------|--------------------------|--------------------------|
| PROMO000... | Buy 2 items A and get 1 fr... | 1/1/2019 | 12/31/2019 | ✓ | | | <input type="checkbox"/> | <input type="checkbox"/> |

Users can refer to other scenario examples at **Other Promotion Scenario Examples**.

Apply Promotion for Orders

On the **Sales Order** card page, a new function called **Check for Promotion** is added under the **Actions > Functions** menu. When you click on this button, it will check the current sales order for applicable Promotions.

← SALES ORDER | WORK DATE: 4/8/2019

101004 · Alpine Ski House

Process Release Posting Prepare Order Request Approval Print/Send Navigate **Actions** Navigate Fewer options

Functions Plan Request Approval Warehouse Posting Print Order Confirmation

- Create Purchase Document
- Calculate Invoice Discount
- Get Recurring Sales Lines...
- Copy Document...
- Move Negative Lines...
- Archive Document
- Send IC Sales Order
- Incoming Document
- Check for Promotions**

Alpine Ski House Due Date 6/13/2019

Ian Deberry Requested Delivery Date 5/14/2019

5/13/2019 External Document No.

5/13/2019

| DESCRIPTION | LOCATION CODE | QUANTITY | RESERVED QUANTITY | UNIT OF MEASURE CODE | UNIT PRICE EXCL. VAT | LINE DISCOUNT % | LINE AMOUNT EXCL. VAT | QTY. TO SHIP | QUANTITY SHIPPED |
|----------------------------|---------------|----------|-------------------|----------------------|----------------------|-----------------|-----------------------|--------------|------------------|
| SYDNEY Swivel Chair, green | | 3 | | PCS | 123.30 | | 369.90 | 3 | |

Subtotal Excl. VAT (GBP) 369.90 Total Excl. VAT (GBP) 369.90

Inv. Discount Amount Excl. VAT (GBP) 0.00 Total VAT (GBP) 0.00

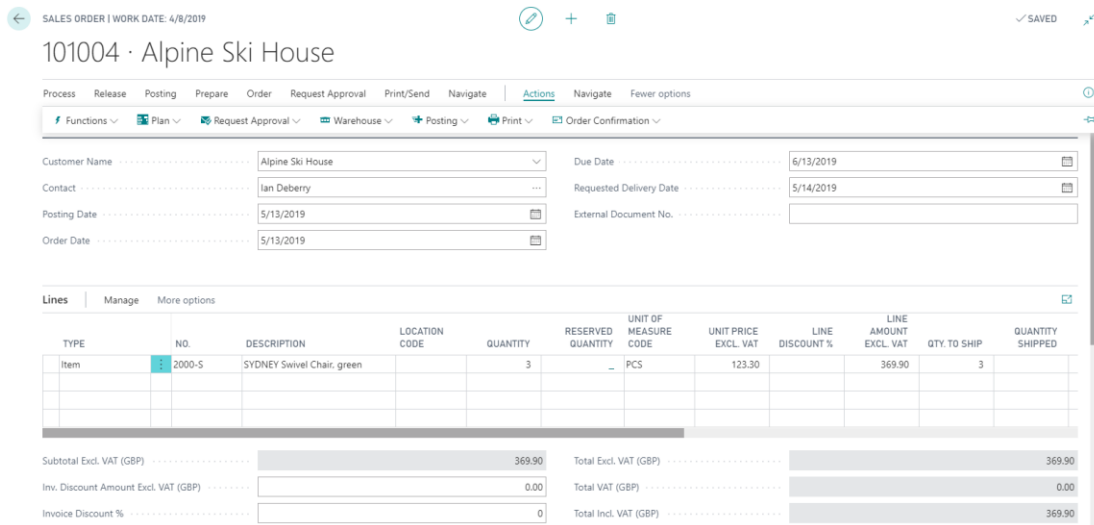
Invoice Discount % 0 Total Incl. VAT (GBP) 369.90

If the sales lines on the **Sales Order** matches the **Condition** scenario on the Promotion card under the active Promotion for the current customer, a new window will be opened displaying all the available Promotions for the user to select. Users can select one or more Promotions to apply. Once a Promotion is selected, the Promotion will be applied to that sales order. The application process will be based on the **Result** defined in the **Promotion Card**.

Users will also be able to see the Promotions that have been applied to this order. This mechanism is designed to prevent a Promotion code from being applied twice on the same sales order. The following are the steps to apply the Promotion to a sales order:

1. Open sales order **101004**, which already contains 3 items **2000-S**. It

will tally with the **Condition** section of the **PROMO000001** Promotion code.



SALES ORDER | WORK DATE: 4/8/2019

101004 · Alpine Ski House

Process Release Posting Prepare Order Request Approval Print/Send Navigate **Actions** Navigate Fewer options

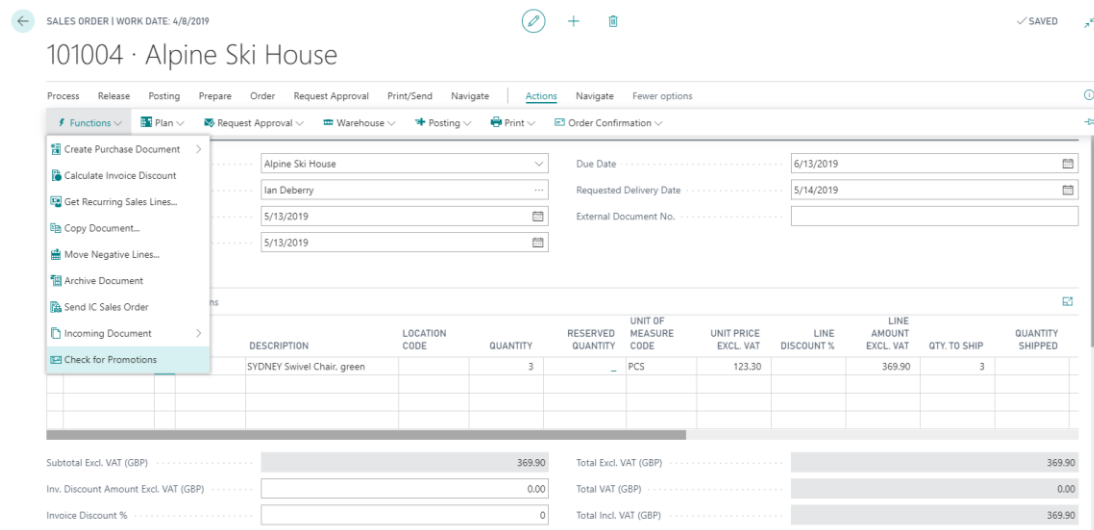
f Functions Plan Request Approval Warehouse Posting Print Order Confirmation

Customer Name: Alpine Ski House Due Date: 6/13/2019
 Contact: Ian Deberry Requested Delivery Date: 5/14/2019
 Posting Date: 5/13/2019 External Document No.:
 Order Date: 5/13/2019

| TYPE | NO. | DESCRIPTION | LOCATION CODE | QUANTITY | RESERVED QUANTITY | UNIT OF MEASURE CODE | UNIT PRICE EXCL. VAT | LINE DISCOUNT % | LINE AMOUNT EXCL. VAT | QTY. TO SHIP | QUANTITY SHIPPED |
|------|--------|----------------------------|---------------|----------|-------------------|----------------------|----------------------|-----------------|-----------------------|--------------|------------------|
| Item | 2000-S | SYDNEY Swivel Chair, green | | 3 | - | PCS | 123.30 | | 369.90 | 3 | |

Subtotal Excl. VAT (GBP) 369.90 Total Excl. VAT (GBP) 369.90
 Inv. Discount Amount Excl. VAT (GBP) 0.00 Total VAT (GBP) 0.00
 Invoice Discount % 0 Total Incl. VAT (GBP) 369.90

2. Click **Actions** dropdown menu.
3. Click **Functions** dropdown menu.
4. Click **Check for Promotions** to open **Active Sales Order Promotion** page.



SALES ORDER | WORK DATE: 4/8/2019

101004 · Alpine Ski House

Process Release Posting Prepare Order Request Approval Print/Send Navigate **Actions** Navigate Fewer options

f Functions Plan Request Approval Warehouse Posting Print Order Confirmation

Create Purchase Document
 Calculate Invoice Discount
 Get Recurring Sales Lines...
 Copy Document...
 Move Negative Lines...
 Archive Document
 Send IC Sales Order
 Incoming Document
Check for Promotions

Customer Name: Alpine Ski House Due Date: 6/13/2019
 Contact: Ian Deberry Requested Delivery Date: 5/14/2019
 Posting Date: 5/13/2019 External Document No.:
 Order Date: 5/13/2019

| DESCRIPTION | LOCATION CODE | QUANTITY | RESERVED QUANTITY | UNIT OF MEASURE CODE | UNIT PRICE EXCL. VAT | LINE DISCOUNT % | LINE AMOUNT EXCL. VAT | QTY. TO SHIP | QUANTITY SHIPPED |
|----------------------------|---------------|----------|-------------------|----------------------|----------------------|-----------------|-----------------------|--------------|------------------|
| SYDNEY Swivel Chair, green | | 3 | - | PCS | 123.30 | | 369.90 | 3 | |

Subtotal Excl. VAT (GBP) 369.90 Total Excl. VAT (GBP) 369.90
 Inv. Discount Amount Excl. VAT (GBP) 0.00 Total VAT (GBP) 0.00
 Invoice Discount % 0 Total Incl. VAT (GBP) 369.90

5. On **Active Sales Order Promotion** page, it will display all the Promotion Codes that can be applied to this order. Users can delete the Promotion lines that they do not want to apply and keep the desired Promotion lines on this page.

Manage [Confirm Promotion](#) | More options

EDIT - ACTIVE SALES ORDER PROMOTION - ORDER · 101004 · PROMO000001 

| PROMOTION NO. | DESCRIPTION |
|---------------|-------------------------------------|
| PROMO000001 | Buy 2 items A and get 1 free item B |

The above promotions are qualified. Click Confirm Promotion to apply.

Delete the promotions you do not wish to apply.

Close

6. Click **Confirm Promotion** button.

After **Confirm Promotion** is processed, a new sales line with Item No. = **1980-S**, Quantity = 1, Unit Price = 0, has been added into the sales order.

SALES ORDER | WORK DATE: 4/8/2019 ✓ SAVED ✕

101004 · Alpine Ski House

Process Release Posting Prepare Order Request Approval Print/Send Navigate | Actions Navigate Fewer options ⓘ

General Show more

| | | | |
|---------------|------------------|-------------------------|-----------|
| Customer Name | Alpine Ski House | Due Date | 6/13/2019 |
| Contact | Ian Deberry | Requested Delivery Date | 5/14/2019 |
| Posting Date | 5/13/2019 | External Document No. | |
| Order Date | 5/13/2019 | | |

Lines | Manage More options ⓘ

| TYPE | NO. | DESCRIPTION | LOCATION CODE | QUANTITY | RESERVED QUANTITY | UNIT OF MEASURE CODE | UNIT PRICE EXCL. VAT | LINE DISCOUNT % | LINE AMOUNT EXCL. VAT | QTY. TO SHIP | QUANTITY SHIPPED |
|------|--------|----------------------------|---------------|----------|-------------------|----------------------|----------------------|-----------------|-----------------------|--------------|------------------|
| Item | 2000-S | SYDNEY Swivel Chair, green | | 3 | - | PCS | 123.30 | | 369.90 | 3 | |
| Item | 1980-S | MOSCOW Swivel Chair, red | | 1 | - | PCS | * | * | | 1 | |

| | | | |
|--------------------------------------|--------|-----------------------|--------|
| Subtotal Excl. VAT (GBP) | 369.90 | Total Excl. VAT (GBP) | 369.90 |
| Inv. Discount Amount Excl. VAT (GBP) | 0.00 | Total VAT (GBP) | 0.00 |
| Invoice Discount % | 0 | Total Incl. VAT (GBP) | 369.90 |

User Note

The Promotions can only be applied when the sales order status = **Open**. After applying, the total sales amount will be recalculated.

- Promotions will be only be added to new sales line. For example, if the promotion is “Buy 2 and get 1 free”, and the customer orders the same item no. with quantity = 3, Dynamics 365 Business Central will add the additional new line for that promotion. The original sales line of quantity = 3 entered by the user will remain intact. In this example, the customer will receive 4 pieces of the product.
- If the Promotion Condition is to grant a different shipping method, then the sales order will be automatically updated with a new shipping agent and shipping service code.

Other Promotion Scenario Examples

Buy 8 of item A and get 1 of Item B with a % discount.

1. Open Demo Sales Order **101003**. And insert a new sales line with item **1996-S** and quantity **1**.

SALES ORDER | WORK DATE: 5/13/2019 ✓ SAVED ✕

101003 · School of Fine Art

Process Release Posting Prepare Order Request Approval Print/Send Navigate | Actions Navigate Fewer options

General Show more

| | | | |
|---------------------|--------------------|-------------------------------|-----------|
| Customer Name | School of Fine Art | Due Date | 4/30/2019 |
| Contact | Meagan Bond | Requested Delivery Date | 4/23/2019 |
| Posting Date | 4/22/2019 | External Document No. | |
| Order Date | 4/22/2019 | | |

Lines | Manage | More options ✕

| TYPE | NO. | DESCRIPTION | LOCATION CODE | QUANTITY | RESERVED QUANTITY | UNIT OF MEASURE CODE | UNIT PRICE EXCL. VAT | LINE DISCOUNT % | LINE AMOUNT EXCL. VAT | QTY. TO SHIP | QUANTITY SHIPPED |
|------|--------|--------------------------|---------------|----------|-------------------|----------------------|----------------------|-----------------|-----------------------|--------------|------------------|
| Item | 1920-S | ANTWERP Conference Table | | 8 | - | PCS | 420.40 | | 3,363.20 | 8 | |
| Item | 1996-S | ATLANTA Whiteboard, base | | 1 | - | PCS | 906.70 | | 906.70 | 1 | |

| | | | |
|--|----------|-----------------------------|----------|
| Subtotal Excl. VAT (GBP) | 4,269.90 | Total Excl. VAT (GBP) | 4,269.90 |
| Inv. Discount Amount Excl. VAT (GBP) | 0.00 | Total VAT (GBP) | 0.00 |
| Invoice Discount % | 0 | Total Incl. VAT (GBP) | 4,269.90 |

2. Promotion Card Setup.

General

| | | | |
|---------------------|------------------------------------|-------------------------|-------------------------------------|
| Description | Buy 8 item A and get 1 Item B in 9 | Salesperson Code | <input type="text"/> |
| Starting Date | 1/1/2019 <input type="text"/> | Activate | <input checked="" type="checkbox"/> |
| Ending Date | 12/31/2019 <input type="text"/> | Include History | <input type="checkbox"/> |
| Customer No. | <input type="text"/> | Use AND Condition | <input type="checkbox"/> |

Condition | Manage

| SALES TYPE | SALES CODE | DESCRIPTION | MINIMUM QUANTITY | MINIMUM AMOUNT |
|------------|------------|--------------------------|------------------|----------------|
| Item | 1920-S | ANTWERP Conference Table | 8 | 0.00 |

Result | Manage

| SALES TYPE | SALES CODE | DESCRIPTION | QUANTITY | DISCOUNT % | UNIT PRICE |
|------------|------------|--------------------------|----------|------------|------------|
| Item | 1996-S | ATLANTA Whiteboard, base | | 50.00 | 0.00 |

3. Sales Order view after Applying Promotion.

SALES ORDER | WORK DATE: 5/13/2019 ✓ SAVED

101003 · School of Fine Art

Process Release Posting Prepare Order Request Approval Print/Send Navigate Actions Navigate Fewer options

General

| | | | |
|---------------------|--------------------|-------------------------------|----------------------|
| Customer Name | School of Fine Art | Due Date | 4/30/2019 |
| Contact | Meagan Bond | Requested Delivery Date | 4/23/2019 |
| Posting Date | 4/22/2019 | External Document No. | <input type="text"/> |
| Order Date | 4/22/2019 | | |

Lines | Manage | More options

| TYPE | NO. | DESCRIPTION | LOCATION CODE | QUANTITY | RESERVED QUANTITY | UNIT OF MEASURE CODE | UNIT PRICE EXCL. VAT | LINE DISCOUNT % | LINE AMOUNT EXCL. VAT | QTY TO SHIP | QUANTITY SHIPPED |
|------|--------|--------------------------|---------------|----------|-------------------|----------------------|----------------------|-----------------|-----------------------|-------------|------------------|
| Item | 1920-S | ANTWERP Conference Table | | 8 | | PCS | 420.40 | | 3,363.20 | 8 | |
| Item | 1996-S | ATLANTA Whiteboard, base | | 1 | | PCS | 453.35 | | 453.35 | 1 | |

| | | | |
|--|----------|-----------------------------|----------|
| Subtotal Excl. VAT (GBP) | 3,816.55 | Total Excl. VAT (GBP) | 3,816.55 |
| Inv. Discount Amount Excl. VAT (GBP) | 0.00 | Total VAT (GBP) | 0.00 |
| Invoice Discount % | 0 | Total Incl. VAT (GBP) | 3,816.55 |

4. Note:

If **Result** Section has both values in **Discount%** and **Unit price**, the promotion will apply **Discount %** instead of modifying item unit price. For example, if users enter **Item No. = 1996-S** in the **Result** Section and enter **Quantity = 2** with **Unit Price = \$5.00**, and grant **Discount = 50%**. Dynamics 365 Business Central will take 50% Discount instead of Quantity 2 at Unit Price = \$5.00 for the Item No. **1996-S**.

Users must add the will-be discounted item in the sales line before applying the promotion, or the Dynamics 365 Business Central will show there's no designed item in the order.

Buy 10 of item A and get free freight.

1. Demo Sales Order **101001** before Applying the Promotion.

SALES ORDER | WORK DATE: 5/13/2019 ✓ SAVED

101001 · Adatum Corporation

Process Release Posting Prepare Order Request Approval Print/Send Navigate Actions Navigate Fewer options

General Show more

Customer Name Adatum Corporation Due Date 5/2/2019

Contact Robert Townes Requested Delivery Date 4/3/2019

Posting Date 4/2/2019 External Document No.

Order Date 4/2/2019

Lines | Manage More options

| TYPE | NO. | DESCRIPTION | LOCATION CODE | QUANTITY | RESERVED QUANTITY | UNIT OF MEASURE CODE | UNIT PRICE EXCL. VAT | LINE DISCOUNT % | LINE AMOUNT EXCL. VAT | QTY. TO SHIP | QUANTITY SHIPPED |
|------|--------|--------------------------|---------------|----------|-------------------|----------------------|----------------------|-----------------|-----------------------|--------------|------------------|
| Item | 1996-S | ATLANTA Whiteboard, base | | 12 | | PCS | 906.70 | | 10,880.40 | 12 | |

Subtotal Excl. VAT (GBP) 10,880.40 Total Excl. VAT (GBP) 10,880.40

Inv. Discount Amount Excl. VAT (GBP) 0.00 Total VAT (GBP) 2,720.10

Invoice Discount % 0 Total Incl. VAT (GBP) 13,600.50

2. Promotion Card Setup.

PROMOTION | WORK DATE: 5/13/2019 ✓ SAVED

PROMO000003

General

Description Buy 10 item A and get free freight Salesperson Code

Starting Date 1/1/2019 Activate

Ending Date 12/31/2019 Include History

Customer No. Use AND Condition

Condition | Manage

| SALES TYPE | SALES CODE | DESCRIPTION | MINIMUM QUANTITY | MINIMUM AMOUNT |
|------------|------------|--------------------------|------------------|----------------|
| Item | 1996-S | ATLANTA Whiteboard, base | 10 | 0.00 |

Result | Manage

| SALES TYPE | SALES CODE | DESCRIPTION | QUANTITY | DISCOUNT % | UNIT PRICE |
|---------------|------------|-------------------|----------|------------|------------|
| Shipping Agen | STANDARD | Standard delivery | 0 | 0.00 | 0.00 |

3. Sales Order view after Applying the Promotion.

SALES ORDER | WORK DATE: 5/13/2019 ✓ SAVED ✕

101001 · Adatum Corporation

Process Release Posting Prepare Order Request Approval Print/Send Navigate Actions Navigate Fewer options

General Show more

Customer Name Adatum Corporation Due Date 5/2/2019

Contact Robert Townes Requested Delivery Date 4/3/2019

Posting Date 4/2/2019 External Document No.

Order Date 4/2/2019

Lines | Manage More options

| TYPE | NO. | DESCRIPTION | LOCATION CODE | QUANTITY | RESERVED QUANTITY | UNIT OF MEASURE CODE | UNIT PRICE EXCL. VAT | LINE DISCOUNT % | LINE AMOUNT EXCL. VAT | QTY. TO SHIP | QUANTITY SHIPPED |
|---------|--------|------------------------------------|---------------|----------|-------------------|----------------------|----------------------|-----------------|-----------------------|--------------|------------------|
| Item | 1996-S | ATLANTA Whiteboard, base | | 12 | - | PCS | 906.70 | | 10.880.40 | 12 | |
| Comment | | Buy 10 item A and get free freight | | | | | | | | | |

Subtotal Excl. VAT (GBP) 10.880.40 Total Excl. VAT (GBP) 10.880.40

Inv. Discount Amount Excl. VAT (GBP) 0.00 Total VAT (GBP) 2.720.10

Invoice Discount % 0 Total Incl. VAT (GBP) 13.600.50

4. Note:

This Promotion will only add one new sales line in the sales order to remind the user. Users have to manually modify the Freight amount in the sales order line to be zero or change into another amount.

Also **Shipping Agent Service** will be changed to **Sales Code in Promotion Result**.

Buy \$1,800 of item 1 ... to item n and get gifts.

1. Demo Sales Order 101002 before Applying the Promotion.

SALES ORDER | WORK DATE: 5/13/2019 ✓ SAVED ✕

101002 · Adatum Corporation

Process Release Posting Prepare Order Request Approval Print/Send Navigate Actions Navigate Fewer options

General Show more

Customer Name Adatum Corporation Due Date 6/1/2019

Contact Robert Townes Requested Delivery Date 5/2/2019

Posting Date 5/1/2019 External Document No.

Order Date 5/1/2019

Lines | Manage More options

| TYPE | NO. | DESCRIPTION | LOCATION CODE | QUANTITY | RESERVED QUANTITY | UNIT OF MEASURE CODE | UNIT PRICE EXCL. VAT | LINE DISCOUNT % | LINE AMOUNT EXCL. VAT | QTY. TO SHIP | QUANTITY SHIPPED |
|------|--------|----------------------------|---------------|----------|-------------------|----------------------|----------------------|-----------------|-----------------------|--------------|------------------|
| Item | 1968-S | MEXICO Swivel Chair, black | | 10 | - | PCS | 123.30 | | 1.233.00 | 10 | |
| Item | 1928-S | AMSTERDAM Lamp | | 7 | - | PCS | 35.60 | | 249.20 | 7 | |

Subtotal Excl. VAT (GBP) 1.482.20 Total Excl. VAT (GBP) 1.482.20

Inv. Discount Amount Excl. VAT (GBP) 0.00 Total VAT (GBP) 370.55

Invoice Discount % 0 Total Incl. VAT (GBP) 1.852.75

2. Promotion Card Setup.

PROMOTION | WORK DATE: 5/13/2019



✓ SAVED

PROMO000004

General

| | | | |
|---------------|-----------------------------------|-------------------|-------------------------------------|
| Description | Buy \$1,800 of items and get gift | Salesperson Code | |
| Starting Date | 1/1/2019 | Activate | <input checked="" type="checkbox"/> |
| Ending Date | 12/31/2019 | Include History | <input type="checkbox"/> |
| Customer No. | | Use AND Condition | <input checked="" type="checkbox"/> |

Condition

| SALES TYPE | SALES CODE | DESCRIPTION | MINIMUM QUANTITY | MINIMUM AMOUNT |
|------------|------------|----------------------------|------------------|----------------|
| Item | 1968-S | MEXICO Swivel Chair, black | 1 | 0.00 |
| Item | 1928-S | AMSTERDAM Lamp | 1 | 0.00 |
| Order | : | | 0 | 1,800.00 |

Result

| SALES TYPE | SALES CODE | DESCRIPTION | QUANTITY | DISCOUNT % | UNIT PRICE |
|------------|------------|-------------|----------|------------|------------|
| Item | 1896-S | ATHENS Desk | 2 | 0.00 | 0.00 |

3. Sales Order After Applying the Promotion.

SALES ORDER | WORK DATE: 5/13/2019



✓ SAVED

101002 · Adatum Corporation

Process Release Posting Prepare Order Request Approval Print/Send Navigate Actions Navigate Fewer options

General

| | | | |
|---------------|--------------------|-------------------------|----------|
| Customer Name | Adatum Corporation | Due Date | 6/1/2019 |
| Contact | Robert Townes | Requested Delivery Date | 5/2/2019 |
| Posting Date | 5/1/2019 | External Document No. | |
| Order Date | 5/1/2019 | | |

Lines

| TYPE | NO. | DESCRIPTION | LOCATION CODE | QUANTITY | RESERVED QUANTITY | UNIT OF MEASURE CODE | UNIT PRICE EXCL. VAT | LINE DISCOUNT % | LINE AMOUNT EXCL. VAT | QTY. TO SHIP | QUANTITY SHIPPED |
|------|--------|----------------------------|---------------|----------|-------------------|----------------------|----------------------|-----------------|-----------------------|--------------|------------------|
| Item | 1968-S | MEXICO Swivel Chair, black | | 10 | | PCS | 123.30 | | 1,233.00 | 10 | |
| Item | 1928-S | AMSTERDAM Lamp | | 7 | | PCS | 35.60 | | 249.20 | 7 | |
| Item | 1896-S | ATHENS Desk | | 2 | | PCS | * | * | | 2 | |

| | | | |
|--------------------------------------|----------|-----------------------|----------|
| Subtotal Excl. VAT (GBP) | 1,482.20 | Total Excl. VAT (GBP) | 1,482.20 |
| Inv. Discount Amount Excl. VAT (GBP) | 0.00 | Total VAT (GBP) | 370.55 |
| Invoice Discount % | 0 | Total Incl. VAT (GBP) | 1,852.75 |