

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 **P** 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 |
|------|----------------------------|-----------|-------------------------------|-------------------------------|--------------------------|---|------------------|---------|
| Fr   | eda Cheng                  |           |                               |                               |                          |   |                  |         |
|      | hange Web Service Key 💀 Ef | fective P | ermissions More options       |                               |                          |   |                  |         |
| Offi | ce 365 Authentication >    |           |                               |                               |                          |   |                  |         |
| User | Groups Manage              |           |                               |                               |                          |   |                  |         |
|      | CODE                       |           |                               | NAME                          |                          | c | OMPANY NAME      |         |
|      | D365 BUS PREMIUM           |           |                               | D365 Premium Business Access  | s                        | c | RONUS USA, Inc.  |         |
|      | D365 EXTENSION MGT         |           |                               | Dynamics 365 Extension manage | gement                   | C | RONUS USA, Inc.  |         |
|      | D365 TROUBLESHOOT          |           |                               | D365 Troubleshoot             |                          | C | RONUS USA, Inc.  |         |
|      |                            |           |                               |                               |                          |   |                  |         |
|      |                            |           |                               |                               |                          |   |                  |         |
| User | Permission Sets Mana       | age       |                               |                               |                          |   |                  |         |
|      | PERMISSION SET             |           | DESCRIPTION                   | COMPANY                       | EXTENSION NAME           |   | PERMISSION SCOPE |         |
|      | ADVANCED SALES PROMO       | 1         | 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.



ZX

| CRONUS International Ltd. Finance Cash Management Sales Purchasing Setup & Extensions Intelligent Clo | oud Insights ~ |
|---|----------------|
| Assisted Setup: All – P 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<br>Provide your company details |             |               |      |        |
|--|-------------|---------------|------|--------|
| Name ·····                                       | CRONUS Int  | ernational Lt | d.   |        |
| Address  | 5 The Ring  |               |      |        |
| Address 2  | Westminster | r             |      |        |
| City · · · · · · · · · · · · · · · · · · ·       | London      |               |      |        |
| County   |             |               |      |        |
| Post Code  | W2 8HG      |               |      |        |
| Country/Region Code                              | GB          |               |      |        |
| Phone No. · · · · · · · · · · · · · · · · · · ·  | 0666-666-66 | 666           |      |        |
| Email  | info@cronu  | s.com         |      | •      |
|  |             | Back          | Next | Finish |

- 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



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#### NUMBER SERIES

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

| Promotion Nos. | ~ ~ |
|----------------|-----|

| Back | Next | Finish |
|------|------|--------|
|------|------|--------|

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 **I** 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                                     | D                                | $\mathbb{Z}$ $	imes$ |
|---|----------------------------------|----------------------|
| promotion setup   |                                  |                      |
| Go to Pages and Tasks   |                                  |                      |
| > Advanced Sales Promotion                                      | Setup                            | Administration       |
| > Advanced Sales Promotion                                      | Subscription Setup               | Administration       |
| <ol> <li>On Advanced Sale</li> <li>Promotion Nos. if</li> </ol> | s Promotion Setup pag<br>needed. | ge, users may change |
| <del>~</del>  |                                  | ✓ SAVED 🖉            |
| Advanced Sale   | s Promotion Setur                | C                    |

# Setup the Advanced Sales Promotion Subscription

Number Series

Promotion Nos. S-PROMO

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

 $\sim$ 



| TELL ME WHAT YOU WANT TO DO                       | $\mathcal{Z}$ $\times$ |
|---|------------------------|
| promotion setup                                   |                        |
| Go to Pages and Tasks                             |                        |
| > Advanced Sales Promotion Setup Adv              | dministration          |
| > Advanced Sales Promotion Subscription Setup Adv | dministration          |

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.

| <ul> <li>rnank you for trying</li> </ul>   | out the Advanced Sales Promotion | app. rour 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                          |                                  |   |                            |

# **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

- Choose the sign 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.

| Actions             | l Sales Promot                 |   |                   |   |
|---------------------|--------------------------------|---|-------------------|---|
| Create Subscription | 🖫 Create Subscription Manually | X Cancel Subscription                       |                   | 궈 |
| 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              |                                |   |                   |   |

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

| CREATE SUBSCRIPTION TO ADVANCED SALES PROMOTION  |         |                |      |       |          |  |
|--|---------|----------------|------|-------|----------|--|
| £03  |         |                |      |       | <b>^</b> |  |
| CUSTOMER DETAILS<br>Provide your company details |         |                |      |       |          |  |
| Name CRON  | NUS Int | ternational Lt | d.   |       |          |  |
| Address 5 The                                    | Ring    |                |      |       |          |  |
| Address 2 · · · · · · · · · · · · · · · · · ·    | minste  | r              |      |       |          |  |
| City · · · · · · Londo                           | on      |                |      |       |          |  |
| County   |         |                |      |       |          |  |
| Post Code · · · · · · · · · · · · · · · · · · ·  | HG      |                |      |       |          |  |
| Country/Region Code · · · · · · GB               |         |                |      |       |          |  |
| Phone No.  | 666 G   | 666            |      |       | -        |  |
|  |         | Back           | Next | Finis | h        |  |

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

AP Commerce Inc.



then click Next.

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

CREATE SUBSCRIPTION TO ADVANCED SALES PROMOTION



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#### 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

6. Click Next.

Finish



| CREATE SUBSCRIPTION TO ADVANCED SALES PROMOTION  | 2        | $\times$ |
|--|----------|----------|
| <u>।</u>   |          |          |
| CREDIT CARD DETAILS<br>Please fill in your credit card details below. They will be safely stored with<br>provider Stripe. No credit card information will be stored in Dynamics 365. |          | ient     |
| VISA 4242 4242 4242 4242 12 /  | 25 666   |          |
| Back   | Finis    | sh       |
| 7. Click <b>Finish</b> to create the subscription and close the wiza   | rd.      |          |
| CREATE SUBSCRIPTION TO ADVANCED SALES PROMOTION  | 2        | $\times$ |
| $\checkmark$   |          |          |
| ALL DONE<br>Click on Finish to create your subscription. Thank you for choosing the Adv<br>Promotion app!  | vanced S | ales     |

| 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.

|  |                                  | +            |  | √ SAVED                 |
|--|----------------------------------|--------------|--|-------------------------|
| Advanced                                 | Sales Promo                      | tion         | Subscrip                                     | tion Setup              |
| imes Thank you for subscrip              | tion to the Advanced Sales Promo | otion app. \ | /our subscription will be                    | charged and start autom |
| Actions                                  |                                  |              |  |                         |
| General                                  |                                  |              |  |                         |
| Name · · · · · · · · · · · · · · · · · · | CRONUS International Ltd.        | Pos          | t Code                                       | W2 8HG                  |
| Address                                  | 5 The Ring                       | Cou          | intry/Region Code                            | GB                      |
| Address 2                                | Westminster                      | Pho          | ne No. · · · · · · · · · · · · · · · · · · · | 0666-666-6666           |
| City · · · · · · · · I                   | London                           | Ema          | ail · · · · · · · · · · · · · · · · · · ·    | info@cronus.co.uk       |
| County                                   |                                  |              |  |                         |
| Subscription Info                        |                                  |              |  |                         |
| Status · · · · · · · · · · ·             | Evaluation                       | Cur          | rent Period Start                            | 7/4/2019 9:04 AM        |
| Last Synchronized                        | 7/4/2019 10:11 AM                | Cur          | rent 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.

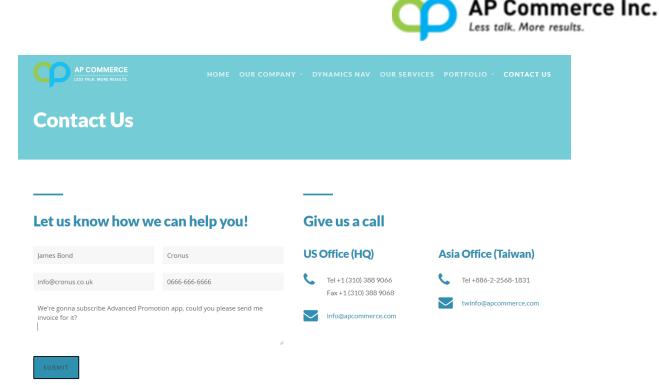


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 $\leftarrow$  $(\mathcal{O})$ √ SAVED Ŵ Advanced Sales Promotion Subscription Setup Actions 🔤 Create Subscription Create Subscription Manually X Cancel Subscription Name CRONUS International Ltd. Post Code W2 8HG GB Address 5 The Ring Country/Region Code Westminster 0666-666-6666 Address 2 Phone No. London Fmail info@cronus.co.uk City · · · · · · · · · · · · · · · County Subscription Info Status Evaluation Current Period Start 7/4/2019 9:04 AM 7/4/2019 10:11 AM 7/5/2019 9:04 AM Current Period End Last Synchronized

 A new page will be open with browser that links to <u>http://www.apcommerce.com/contact-us/</u>. 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.

| AP COMMERCE<br>LESS TALK. MORE RESULTS. |               |      |                                      |     |                |             |
|---|---------------|------|--------------------------------------|-----|----------------|-------------|
| Contact Us                              |               |      |                                      |     |                |             |
|   |               |      |                                      |     |                |             |
|   |               |      |                                      |     |                |             |
| Let us know how w                       | e can help yo | u! ( | Give us a ca                         | all |                |             |
| Name (Required)                         | Company Name  |      | US Office (HQ)                       |     | Asia Office (  | Faiwan)     |
| Email Address (Required)                | Phone Number  | •    | Tel +1 (310) 388<br>Fax +1 (310) 388 |     | C Tel +886-2-2 | 568-1831    |
| Write a message (Required)              |               | 1    | info@apcomme                         | i   | twinfo@apco    | ommerce.com |
| SUBMIT                                  |               |      |                                      |     |                |             |



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.

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|                     |                                | + 1                                   | √ SAVED           | 2 |
|---------------------|--------------------------------|---------------------------------------|-------------------|---|
| Advanced            | Sales Promot                   | ion Subscrip                          | otion Setup       |   |
| Actions             |                                |                                       |                   |   |
| Create Subscription | 🖫 Create Subscription Manually | × Cancel Subscription                 |                   | 4 |
| 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.



| General Name CRONUS International Ltd. Post Code W2           |               |
|---|---------------|
| Name · · · · · · · · · · · · · · · · · · ·                    |               |
|   | 8HG           |
| Address · · · · · · · 5 The Ring Country/Region Code · · · GB |               |
| Address 2 · · · · · · · Westminster Phone No. · · · · · · 066 | 6-666-6666    |
| City · · · · · · Email · · · · · · info                       | @cronus.co.uk |
| County  |               |

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.

| 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                    | i Subscription will be car | ncelled after current period end. |                   |
| Subscription Info         | Subscription will be car   | ncelled after current period end. |                   |



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# 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 |

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| 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 10:18 AM | Current Period End   | 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 **Promotions** link to open the list page.

TELL ME WHAT YOU WANT TO DO

promotion list

Go to Pages and Tasks

> Promotions

Lists

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

| $\leftarrow$ | PROMOTIONS | NORK DATE: 4/8/2019 |                  |                    |            |                 |                  |            | 2                |
|--------------|------------|---------------------|------------------|--------------------|------------|-----------------|------------------|------------|------------------|
|              | 🔎 Search 🛛 | 🕂 New Manage 関 Op   | oen in Excel     |                    |            |                 |                  | Y          | <b>=</b>         |
|              | N0.        | DESCRIPTION         | STARTING<br>DATE | ENDING<br>DATE     | AC         | CUSTOMER<br>NO. | SALESPER<br>CODE | INC<br>HIS | USE<br>AND<br>CO |
|              |            |                     | (There is no     | thing to show in t | this view) |                 |                  |            |                  |
|              |            |                     |                  |                    |            |                 |                  |            |                  |
|              |            |                     |                  |                    |            |                 |                  |            |                  |
|              |            |                     |                  |                    |            |                 |                  |            |                  |
|              |            |                     |                  |                    |            |                 |                  |            |                  |
|              |            |                     |                  |                    |            |                 |                  |            |                  |
|              |            |                     |                  |                    |            |                 |                  |            |                  |
|              |            |                     |                  |                    |            |                 |                  |            |                  |
|              |            |                     |                  |                    |            |                 |                  |            |                  |
|              | 3. On th   | e newly created     | d Promo          | otion ca           | ard. u     | isers car       | setup d          | iffere     | nt               |

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.

| Show Attached M             | ore options     |   |             |            |                 |                     |                           |
|-----------------------------|-----------------|---|-------------|------------|-----------------|---------------------|---------------------------|
| General                     |                 |   |             |            |                 |                     |                           |
| Description · · · · · · ·   |                 |   |             | Salesperso | on Code         |                     |                           |
| Starting Date · · · · · · · |                 |   |             | Activate   |                 |                     |                           |
| Ending Date                 |                 |   |             | Include Hi | story · · · · · |                     |                           |
| Customer No.                |                 |   | $\sim$      | Use AND (  | Condition · · · |                     |                           |
|                             |                 |   |             |            |                 |                     |                           |
| Condition Mana              | ge<br>SALES COD | E | DESCRIPTION |            |                 | MINIMUM<br>QUANTITY | MINIMUM<br>AMOUNT         |
|                             |                 | E | DESCRIPTION |            |                 |                     | MINIMUM                   |
| SALES TYPE                  |                 | E | DESCRIPTION |            |                 | QUANTITY            | MINIMUM<br>AMOUNT         |
| SALES TYPE                  |                 |   | DESCRIPTION |            | QUANTITY        | QUANTITY            | MINIMUM<br>AMOUNT<br>0.00 |



# 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:

- 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.
- 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.

| Description   | Buy 2 items A an | d get 1 free item | Salesperson Code  |               |             |
|---------------|------------------|-------------------|-------------------|---------------|-------------|
| Starting Date | 1/1/2019         | Ē                 | Activate          |               |             |
| Ending Date   | 12/31/2019       | Ē                 | Include History   |               |             |
| Customer No.  |                  | ~                 | Use AND Condition |               |             |
|               |                  |                   |                   | MINIMUM       | MINIMU      |
| SALES TYPE    | SALES CODE       | DESCRIPTI         | ON                | QUANTITY      | IUOMA       |
| SALES TYPE    | SALES CODE       | DESCRIPTI         | 0N                | QUANTITY<br>0 | AMOUI<br>0. |
|               | SALES CODE       | DESCRIPTI         | 0N                |               |             |



## Setup Promotion Condition

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

- 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.
- 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.
- 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.

| Description                 | Buy 2 items A and g | get 1 free item | Salesperson Code | 2          |                     |               |
|-----------------------------|---------------------|-----------------|------------------|------------|---------------------|---------------|
| Starting Date · · · · · · · | 1/1/2019            |                 | Activate         |            |                     |               |
| Ending Date                 | 12/31/2019          | ţ.              | Include History  |            |                     |               |
| Customer No.                |                     | $\sim$          | Use AND Conditi  | on · · · · |                     |               |
| Condition Mana              |                     |                 |                  |            |                     |               |
| Condition Mana              |                     | DESCRIPTIO      |                  |            | MINIMUM<br>QUANTITY | MINIM<br>AMOL |
|                             | ge                  |                 |                  |            |                     |               |
| SALES TYPE                  | ge<br>SALES CODE    |                 | DN               |            | QUANTITY            | AMOL          |



## Setup Promotion Result

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

- 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.
- 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.
- 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.

| General          |                   |                   |                         |             |                     |                    |
|------------------|-------------------|-------------------|-------------------------|-------------|---------------------|--------------------|
| Description      | Buy 2 items A and | d get 1 free item | Salesperson Cod         | e · · · · · |                     |                    |
| Starting Date    | 1/1/2019          |                   | Activate · · · · ·      |             |                     |                    |
| Ending Date      | 12/31/2019        |                   | Include History         |             |                     |                    |
| Customer No.     |                   | $\sim$            | Use AND Condit          | ion · · · · |                     |                    |
| Condition Manag  | je                |                   |                         |             |                     |                    |
| Condition Manage | ge<br>SALES CODE  | DESCRIPTI         | ON                      |             | MINIMUM<br>QUANTITY |                    |
|                  | -                 |                   | 0N<br>ivel Chair, green |             |                     | MINIM<br>AMOU<br>C |
| SALES TYPE       | SALES CODE        |                   |                         |             | QUANTITY            | AMOU               |

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



|   | $\leftarrow$ | PROMOTIONS   WO | RK DATE: 4/8/2019          |            |            |    |      |   | 2   |
|---|--------------|-----------------|----------------------------|------------|------------|----|------|---|-----|
| NO. DESCRIPTION STARTING ENDING CUSTOMER SALESPER INC AND<br>DATE DATE AC NO. CODE HIS CO |              | , > Search + №  | New Manage 🚺 Oper          | n in Excel |            |    |      | Y | '≣  |
| PROMO000 : Buy 2 items A and get 1 fr 1/1/2019 12/31/2019 🗹                               |              | NO.             | DESCRIPTION                |            |            | AC | <br> |   | AND |
|   |              | PROMO000 :      | Buy 2 items A and get 1 fr | 1/1/2019   | 12/31/2019 |    |      |   |     |

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.

| Process Release Posting     | Prepare | Order Request Approval                    | Print/Send Na               | rigate Action | s Navigate   | Fewer option:              | 5                       |                    |                             |              |                     |
|-----------------------------|---------|---|-----------------------------|---------------|--------------|----------------------------|-------------------------|--------------------|-----------------------------|--------------|---------------------|
| 🖸 Functions 🗸 📑 Plan 🗸      | 🔜 Reque | st Approval 🗸 🛛 🎟 Warehouse               | <ul> <li>Posting</li> </ul> | 🗸 🖶 Print 🗸   | Order Confir | mation $\checkmark$        |                         |                    |                             |              |                     |
| Create Purchase Document    | >       |   |                             |               |              |                            |                         |                    |                             |              |                     |
| Calculate Invoice Discount  |         | Alpine Ski House                          |                             | ~             | Due Date     |                            |                         | 6/13/2019          |                             |              | 1                   |
| 🛂 Get Recurring Sales Lines |         | Ian Deberry                               |                             |               | Requested    | Delivery Date              |                         | 5/14/2019          |                             |              | [                   |
| Copy Document               |         | 5/13/2019                                 |                             |               | External D   | ocument No. 🕠              |                         |                    |                             |              |                     |
| Copy Document               |         | 5/13/2019                                 |                             |               |              |                            |                         |                    |                             |              |                     |
| Archive Document            |         |   |                             |               |              |                            |                         |                    |                             |              |                     |
| Archive Document            | -       |   |                             |               |              |                            |                         |                    |                             |              |                     |
| _                           | ns      |   |                             |               |              |                            |                         |                    |                             |              | 6                   |
| Send IC Sales Order         | ns      | DESCRIPTION                               | LOCATION<br>CODE            | QUANTITY      | RESERVED     | UNIT OF<br>MEASURE<br>CODE | UNIT PRICE<br>EXCL. VAT | LINE<br>DISCOUNT % | LINE<br>AMOUNT<br>EXCL. VAT | QTY. TO SHIP | QUANTITY<br>SHIPPED |
| Send IC Sales Order         | ns      | DESCRIPTION<br>SYDNEY Swivel Chair, green |                             | QUANTITY<br>3 | QUANTITY     | MEASURE                    |                         |                    | AMOUNT                      | QTY. TO SHIP | QUANTITY            |
| Send IC Sales Order         | ns      |   |                             |               | QUANTITY     | MEASURE<br>CODE            | EXCL. VAT               |                    | AMOUNT<br>EXCL. VAT         |              | QUANTITY            |
| Send IC Sales Order         | ns .    |   |                             |               | QUANTITY     | MEASURE<br>CODE            | EXCL. VAT               |                    | AMOUNT<br>EXCL. VAT         |              | QUANTITY            |

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 DA             | ATE: 4/8/2019                 |   |                  | Ø             | + 🗈                                      |                                   |                                   |                    |                             |                   | √ SAVED             |
|-----------------------------------|-------------------------------|---|------------------|---------------|--|-----------------------------------|-----------------------------------|--------------------|-----------------------------|-------------------|---------------------|
| 101004 · A                        | Alpine S                      | iki House                                 |                  |               |  |                                   |                                   |                    |                             |                   |                     |
| Process Release P                 | osting Prepare                | Order Request Approval                    | Print/Send Na    | vigate Action | Navigate                                 | Fewer option                      | s                                 |                    |                             |                   |                     |
| 🖸 Functions 🗸 📑                   | Plan 🗸 🛛 📑 Req                | uest Approval 🗸 🚥 Warehouse               | ✓ ♥ Posting      | V 🖶 Print V   | Order Confir                             | mation $\checkmark$               |                                   |                    |                             |                   |                     |
| Customer Name                     |                               | Alpine Ski House                          |                  | ~             | Due Date                                 |                                   |                                   | 6/13/2019          |                             |                   |                     |
| Contact · · · · · · · · · · · ·   |                               | lan Deberry                               |                  |               | Requested                                | Delivery Date                     |                                   | 5/14/2019          |                             |                   |                     |
|                                   |                               |   |                  |               | E-town I D                               |                                   |                                   |                    |                             |                   |                     |
| Posting Date                      |                               |   |                  |               | External D                               | ocument No. • •                   |                                   |                    |                             |                   |                     |
| Order Date                        |                               |   |                  |               | External D                               | Scument No. • •                   |                                   |                    |                             |                   |                     |
| Order Date                        |                               |   | LOCATION<br>CODE |               | RESERVED<br>QUANTITY                     | UNIT OF<br>MEASURE<br>CODE        | UNIT PRICE<br>EXCL. VAT           | LINE<br>DISCOUNT % | LINE<br>AMOUNT<br>EXCL. VAT | QTY. TO SHIP      | QUANTITY<br>SHIPPED |
| Order Date                        | More options                  | 5/13/2019                                 |                  |               | RESERVED<br>QUANTITY                     | UNIT OF<br>MEASURE                | UNIT PRICE                        | LINE               | AMOUNT                      | QTY. TO SHIP<br>3 | QUANTITY            |
| Order Date                        | More options<br>N0.           | 5/13/2019<br>DESCRIPTION                  |                  | QUANTITY      | RESERVED<br>QUANTITY                     | UNIT OF<br>MEASURE<br>CODE        | UNIT PRICE<br>EXCL. VAT           | LINE               | AMOUNT<br>EXCL. VAT         |                   | QUANTITY            |
| Order Date                        | More options<br>N0.           | 5/13/2019<br>DESCRIPTION                  |                  | QUANTITY      | RESERVED<br>QUANTITY                     | UNIT OF<br>MEASURE<br>CODE        | UNIT PRICE<br>EXCL. VAT           | LINE               | AMOUNT<br>EXCL. VAT         |                   | QUANTITY            |
| Order Date                        | More options<br>NO.<br>2000-S | DESCRIPTION<br>SYDNEY Swivel Chair. green |                  | QUANTITY      | RESERVED<br>QUANTITY                     | UNIT OF<br>MEASURE<br>CODE<br>PCS | UNIT PRICE<br>EXCL. VAT           | LINE<br>DISCOUNT % | AMOUNT<br>EXCL. VAT         |                   | QUANTITY            |
| Order Date Lines Manage TVPE Item | More options N0. 2000-S       | DESCRIPTION<br>SYDNEY Swivel Chair. green |                  | QUANTITY<br>3 | RESERVED<br>QUANTITY<br>–<br>Total Excl. | UNIT OF<br>MEASURE<br>CODE<br>PCS | UNIT PRICE<br>EXCL. VAT<br>123.30 | LINE<br>DISCOUNT % | AMOUNT<br>EXCL. VAT         |                   | QUANTITY<br>SHIPPED |

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

| Process Release Posting F  | Prepare Order Request Approva                   | al Print/Send Na | vigate <u>Action</u> | Navigate     | Fewer option:              |                         |                    |                             |              |                     |
|--|---|------------------|----------------------|--------------|----------------------------|-------------------------|--------------------|-----------------------------|--------------|---------------------|
| ∮ Functions ∨ ■ Plan ∨   | Request Approval 🗸 📼 Wareh                      | ouse 🗸 🔹 Posting | 🗸 🖶 Print 🗸          | Order Confin | mation $\checkmark$        |                         |                    |                             |              |                     |
| Create Purchase Document   | Alpine Ski House                                |                  | ~                    | Due Date     |                            |                         | 6/13/2019          |                             |              | 6                   |
| Calculate Invoice Discount   | · · · · · · · Ian Deberry                       |                  |                      | Requested    | Delivery Date              |                         | 5/14/2019          |                             |              | Ē                   |
| Copy Document  | 5/13/2019                                       |                  | <b></b>              | External D   | ocument No. · ·            |                         |                    |                             |              |                     |
| Move Negative Lines  | 5/13/2019                                       |                  |                      |              |                            |                         |                    |                             |              |                     |
|  |   |                  |                      |              |                            |                         |                    |                             |              |                     |
| Archive Document   |   |                  |                      |              |                            |                         |                    |                             |              |                     |
| _  | ns  |                  |                      |              |                            |                         |                    |                             |              | E                   |
| Send IC Sales Order  | ns<br>DESCRIPTION                               | LOCATION         | QUANTITY             | RESERVED     | UNIT OF<br>MEASURE<br>CODE | UNIT PRICE<br>EXCL. VAT | LINE<br>DISCOUNT % | LINE<br>AMOUNT<br>EXCL. VAT | QTY. TO SHIP | QUANTITY<br>SHIPPED |
| Send IC Sales Order  | ns<br>DESCRIPTION<br>SYDNEY Swivel Chair, green | CODE             | QUANTITY<br>3        | QUANTITY     | MEASURE                    |                         |                    | AMOUNT                      | QTY. TO SHIP | QUANTITY            |
| Send IC Sales Order  |   | CODE             |                      | QUANTITY     | MEASURE<br>CODE            | EXCL. VAT               |                    | AMOUNT<br>EXCL. VAT         |              | QUANTITY            |
| Archive Document       Incoming Document       Incoming Document       Deck for Promotions |   | CODE             |                      | QUANTITY     | MEASURE<br>CODE            | EXCL. VAT               |                    | AMOUNT<br>EXCL. VAT         |              | QUANTITY            |

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.



Close

| Manage     | Confirm Promotion     More of             | options              |                                     |   |
|------------|---|----------------------|-------------------------------------|---|
| EDIT - AC  | TIVE SALES ORDER PROMOTION - ORDE         | R · 101004 · PROMO   | 000001                              | 2 |
|            | PROMOTION NO                              |                      | DECODIDITION                        |   |
|            | PROMOTION NO.                             | :                    | DESCRIPTION                         |   |
|            | PROMO000001                               |                      | Buy 2 items A and get 1 free item B |   |
|            |   |                      |                                     |   |
|            |   |                      |                                     |   |
| The show   |   | . D                  |                                     |   |
| The above  | e promotions are qualified. Click Confirm | 1 Promotion to apply | у.                                  |   |
| Delete the | e promotions you do not wish to apply.    |                      |                                     |   |

## 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.

|        |                            | Print/Send Nav  | rigate Action  | ns Navigate  | Fewer option               | 15  |                    |   |  |   |
|--------|----------------------------|---|--|--|----------------------------|---|--------------------|---|--|---|
|        |                            |   |  |  |                            |   |                    |   |  | Show  |
|        | Alpine Ski House           |   | ~  | Due Date   |                            |   | 6/13/2019          |   |  |   |
|        | Ian Deberry                |   |  | Requested  | Delivery Date              |   | 5/14/2019          |   |  |   |
|        | 5/13/2019                  |   |  | External D   | ocument No.                |   |                    |   |  |   |
|        | 5/13/2019                  |   |  |  |                            |   |                    |   |  |   |
| NO.    | DESCRIPTION                | LOCATION  | QUANTITY   | RESERVED<br>QUANTITY   | UNIT OF<br>MEASURE<br>CODE | UNIT PRICE<br>EXCL. VAT   | LINE<br>DISCOUNT % | LINE<br>AMOUNT<br>EXCL. VAT   | QTY. TO SHIP   | QUANTIT   |
| 2000-S | SYDNEY Swivel Chair, green |   | 3  |  |                            | 123.30  |                    | 369.90  | 3  |   |
| 1900-5 | MUSCOW Swivel Chair, red   |   | 1  | -  | PCS                        | *   |                    | *   | 1  |   |
|        |                            |   |  |  |                            |   |                    |   |  |   |
|        |                            |   |  |  |                            |   |                    |   |  |   |
|        | lore options               | Ian Deberry           [an Deberry           5/13/2019           5/13/2019           ore options           N0.           DESCRIPTION           2000-5           SYDNEY Swivel Chair, green | Ian Deberry           Ian Deberry           5/13/2019           5/13/2019           Iore options           N0.         DESCRIPTION           2000-5         SYDNEY Swivel Chair, green | Ian Deberry            [an Deberry            [5/13/2019            [5/13/2019            Iore options            No.         DESCRIPTION         CODE           2000-5         SYDNEY Swivel Chair: green         3 | Ian Deberry                | Ian Deberry         Requested Delivery Date           5/13/2019         External Document No.           5/13/2019         Image: Specific Stress | In Debeny          | Ian Deberry          Requested Delivery Date         5/14/2019           5/13/2019         External Document No.            5/13/2019             5/13/2019             fore options             NO.         DESCRIPTION         LOCATION<br>CODE            2000-5         SYDNEY Swivel Chair, green         3            3          PCS         123.30 | Ian Deberry         Requested Delivery Date         5/14/2019           5/13/2019         External Document No.         5/13/2019           5/13/2019         Marco Science         External Document No.           5/13/2019         Marco Science         External Document No.           Iore options         UNIT OF         LINE         AMOUNT           2000-5         SYNNEY Swivel Chair: green         3         _         PCS         123.00         365.90 | Ian Deberry         Requested Delivery Date         5/14/2019           5/13/2019         External Document No.         5/13/2019           5/13/2019         Image: Constraint of the second |



## 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.

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

|                                 | osting Prepare | Order Request Approval                  | Print/Send Nav   | vigate Action | s Navigate           | Fewer options              |                         |                    |                                 |              |                     |
|---------------------------------|----------------|---|------------------|---------------|----------------------|----------------------------|-------------------------|--------------------|---------------------------------|--------------|---------------------|
| General                         |                |   |                  |               |                      |                            |                         |                    |                                 |              | Show m              |
| Customer Name                   |                | School of Fine Art                      |                  | $\sim$        | Due Date             |                            |                         | 4/30/2019          |                                 |              | ſ                   |
| Contact · · · · · · · · · · · · |                | Meagan Bond                             |                  |               | Requested            | Delivery Date              |                         | 4/23/2019          |                                 |              | E                   |
| osting Date                     |                | 4/22/2019                               |                  |               | External D           | cument No. · ·             |                         |                    |                                 |              |                     |
| Order Date                      |                | 4/22/2019                               |                  |               |                      |                            |                         |                    |                                 |              |                     |
|                                 |                |   |                  |               |                      |                            |                         |                    |                                 |              |                     |
| Lines Manage                    | More options   | DESCRIPTION                             | LOCATION<br>CODE | QUANTITY      | RESERVED<br>QUANTITY | UNIT OF<br>MEASURE<br>CODE | UNIT PRICE<br>EXCL. VAT | LINE<br>DISCOUNT % | LINE<br>AMOUNT<br>EXCL. VAT     | QTY. TO SHIP | QUANTITY<br>SHIPPED |
| TYPE                            | NO.<br>1920-S  | DESCRIPTION<br>ANTWERP Conference Table |                  | QUANTITY<br>8 | QUANTITY             | MEASURE<br>CODE<br>PCS     | EXCL. VAT<br>420.40     |                    | AMOUNT<br>EXCL. VAT<br>3,363.20 | 8            | QUANTITY            |
| TYPE                            | NO.            | DESCRIPTION                             |                  | QUANTITY      | QUANTITY             | MEASURE                    | EXCL. VAT               |                    | AMOUNT<br>EXCL. VAT             |              | QUANTITY            |
| TYPE                            | NO.<br>1920-S  | DESCRIPTION<br>ANTWERP Conference Table |                  | QUANTITY<br>8 | QUANTITY             | MEASURE<br>CODE<br>PCS     | EXCL. VAT<br>420.40     |                    | AMOUNT<br>EXCL. VAT<br>3,363.20 | 8            | QUANTITY            |

2. Promotion Card Setup.

| PROMOTION   WORK I   | DATE: 5/13/2019  |           |                        | +   | ۱.  |   |                        | ``                                     | ∕ SAVED                | 2                 |       |
|--|--|-----------|------------------------|---|---|---|------------------------|--|------------------------|-------------------|-------|
| PROMC  | 000002   | )<br>-    |                        |   |   |   |                        |  |                        |                   |       |
| General  |  |           |                        |   |   |   |                        |  |                        |                   |       |
| Description · · · · · ·  | Buy 8 item A   | and get 1 | ltem B in 9            | Salesp  | person Cod                                | e                                       |                        |  |                        | $\sim$            |       |
| Starting Date · · · · ·  | 1/1/2019   |           |                        | Activa  | ite · · · · ·                             |   |                        |  |                        |                   |       |
| Ending Date  | 12/31/2019   |           | ini.                   | Includ  | le History                                |   |                        |  |                        |                   |       |
| Customer No.   |  |           | $\sim$                 | Use A   | ND Condit                                 | ion · · · ·                             |                        |  |                        |                   |       |
|  |  |           |                        |   |   |   |                        |  |                        |                   |       |
| Condition N  | lanage   |           |                        |   |   |   |                        |  |                        | 62                |       |
| SALES TYPE   | SALES COL  | DE        | DESCRIPTION            |   |   |   | MINIMUM<br>QUANTITY    |  | MINIMU<br>AMOUN        |                   |       |
| Item   | : 1920-S   |           | ANTWERP Cor            | nference 1  | Table                                     |   | 8                      |  | 0.                     | 00                |       |
| SALES  |  |           |                        |   |   |   |                        |  |                        | 62                |       |
|  | SALES CODE   | DESCR     | PTION                  |   | QUA                                       | NTITY                                   | DISCOUN                | r %                                    | UNIT PRIC              |                   |       |
| TYPE<br>Item   | SALES CODE<br>1996-S   | DESCR     | IPTION<br>A Whiteboard | , base  | QUA                                       | NTITY                                   | DISCOUN                | .00                                    | UNIT PRIC              |                   |       |
| TYPE<br>Item   | 1996-S   | ATLANT    | A Whiteboard           |   |   |   |                        |  |                        | Έ                 |       |
| TYPE Item S. Sales Or ORDER I WORK DATE: 5/13/2019 003 · School of   | <sup>1996-S</sup><br>der view a  | fter A    | A Whiteboard           | g Pro<br>+ 🔹  | motic                                     | on.                                     |                        |  |                        | CE<br>00<br>SAVED | 0     |
| TYPE Item Item S. Sales Or RDER I WORK DATE: 5/13/2019 OO3 · School ( Release Posting Prepare al rName   | 1996-S<br>der view a<br>of Fine Art<br>Order Request Approval<br>School of Fine Art<br>Meagan Bond   | fter A    | A Whiteboard           | g Pro<br>+ ®<br>s Navigate  | Pewer options                             | on.                                     | 50<br>                 |  |                        | CE<br>00<br>Show  | nore  |
| TYPE Item Item C. Sales Or CONTROL ATE: 5/13/2019 OO3 · School C Release Posting Prepare al cr Name  | 1996-S<br>der view a<br>of Fine Art<br>Order Request Approval  | fter A    | A Whiteboard           | g Pro<br>+ ®<br>s Navigate  | motic<br>Fewer options                    | on.                                     | 50<br>                 |  |                        | CE<br>00<br>Show  | onore |
| TYPE Item Item C. Sales Or COMPACT Second Comparison of the second secon | 1996-S der view a of Fine Art Order Request Approval School of Fine Art Meagan Bond 4/22/2019  | fter A    | A Whiteboard           | g Pro<br>+ ®<br>s Navigate  | Pewer options                             | on.                                     | 50<br>                 |  |                        | Show              |       |
| TYPE Item S. Sales Or OO3 · School of Release Posting Prepare al rn Name Date Manage More options  | 1996-S der view a of Fine Art Order Request Approval School of Fine Art Meagan Bond 4/22/2019 4/22/2019  | ATLANT    | A Whiteboard           | g Pro<br>+ ®<br>s Navigate<br>Due Date<br>Requested<br>External D | Fewer options Fewer options Delivery Date | UNIT PRICE                              | 50<br>                 | LINE                                   | 0.                     | Show              | onore |
| TYPE Item Item Constraints Item Item Item Item Item Item Item Item   | 1996-S Coder view a Coder view a Coder view a Coder Art Coder Request Approval Coder Request Approval Coder Art Meagan Bond 4/22/2019 4/22/2019 DESCRIPTION ANTWERP Conference Table | ATLANT    | A Whiteboard           | s Navigate  | Fever options                             | DD.<br>UNIT PRICE<br>EXCL VAT<br>420.40 | 4/30/2019<br>4/23/2019 | LINE<br>AMOUNT<br>EXCL VAT<br>3.363.20 | 0.<br>077.70 SHIP<br>8 | Show              |       |
| TYPE Item Item B. Sales Or ORDER I WORK DATE: 5/13/2019 OO3 · School G Release Posting Prepare al re Name Manage More options te No.   | 1996-S Coder view a Cof Fine Art Order Request Approval Coder School of Fine Art Meagan Bond 4/22/2019 4/22/2019 DESCRIPTION   | ATLANT    | A Whiteboard           | g Pro<br>+ ®<br>s Navigate<br>Due Date<br>Requested<br>External D | Fewer options                             | DD.                                     | 50<br>                 | LINE<br>AMOUNT<br>EXCL VAT             | О.<br>                 | Show              |       |

#### 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.

|                      | • Adatum                  | Corporatior                             | 1            |                | + 🛍         |                       |               |            |                        |              | √ SA   |
|----------------------|---------------------------|---|--------------|----------------|-------------|-----------------------|---------------|------------|------------------------|--------------|--------|
| ocess Release        |                           | Order Request Approval                  |              | avigate Action | ns Navigate | Fewer options         |               |            |                        |              |        |
| eneral               |                           |   |              |                |             |                       |               |            |                        |              | Sł     |
| istomer Name         |                           | Adatum Corporation                      |              | ~              | Due Date    |                       |               | 5/2/2019   |                        |              |        |
| ontact · · · · · · · |                           | Robert Townes                           |              |                |             | Delivery Date         |               | 4/3/2019   |                        |              |        |
|                      |                           |   |              |                |             | ,                     |               | 4/3/2013   |                        |              |        |
| sting Date           |                           | 4/2/2019                                |              |                | External D  | ocument No. · · ·     |               |            |                        |              |        |
| der Date             |                           | 4/2/2019                                |              |                |             |                       |               |            |                        |              |        |
| nes Mana             | age More options          |   |              |                |             | 1017.07               |               |            | 1015                   |              |        |
|                      |                           |   | LOCATION     | QUANTITY       | RESERVED    | UNIT OF<br>MEASURE    | UNIT PRICE    | LINE       | LINE                   |              | QUANT  |
| TYPE                 | N0.                       | DESCRIPTION<br>ATLANTA Whiteboard, base | CODE         | QUANTITY<br>12 | QUANTITY    | CODE                  | 906.70        | DISCOUNT % | EXCL. VAT<br>10,880.40 | QTY. TO SHIP | SHIPP  |
| item                 | 1550-5                    | ALLANTA WIIteboard, base                |              | 16             | -           | 103                   | 500.70        |            | 10,000,40              | 14           |        |
|                      |                           |   |              |                |             |                       |               |            |                        |              |        |
|                      |                           |   |              |                | _           |                       |               |            |                        |              |        |
| hannal Fund MAT (    | (0.0)                     |   |              | 10,000,40      | Tetal Fuel  | VAT (CRD)             |               |            |                        |              | 10     |
| btotal Excl. VAT (   |                           |   |              | 10.880.40      | Total Excl. |                       |               |            |                        |              | 10     |
| v. Discount Amou     | unt Excl. VAT (GBP)       |   |              | 0.00           | Total VAT   | (GBP) · · · · · · · · |               |            |                        |              | 2      |
| voice Discount %     |                           |   |              | 0              | Total Incl. | VAT (GBP)             |               |            |                        |              | 13     |
| Gene                 | eral                      |   |              |                |             |                       |               |            |                        |              |        |
| Descri               | ption · · · · · ·         | Buy 10 item                             | A and get fr | ee freight     | Salesp      | erson Cod             | e             |            |                        |              | $\sim$ |
| Startin              | ng Date · · · · ·         | 1/1/2019                                |              |                | Activa      | te                    |               |            |                        |              |        |
| Ending               | g Date                    | 12/31/2019                              |              |                | Includ      | e History             |               |            |                        |              |        |
| Custor               | mer No.                   |   |              | $\sim$         | Use A       | ND Conditi            | ion · · · · · |            |                        |              |        |
| Cond                 | lition M                  | lanage                                  |              |                |             |                       |               |            |                        |              | 63     |
|                      | 1                         | -                                       |              |                |             |                       |               |            |                        | MINIMU       |        |
|                      | SALES TYPE                | SALES C0<br>1996-S                      |              | ESCRIPTION     |             | ase                   |               | QUANTITY   | )                      | AMOUN        |        |
| - H                  |                           |   |              |                |             |                       |               |            |                        |              |        |
|                      |                           |   |              |                |             |                       |               |            |                        |              |        |
|                      |                           |   |              |                |             |                       |               |            |                        |              |        |
| Resul                | lt Manag                  | ge                                      |              |                |             |                       |               |            |                        |              | 62     |
| 9                    | lt Manag<br>SALES<br>IYPE | ge<br>SALES CODE                        | DESCRIF      | PTION          |             | QUA                   | NTITY         | DISCOUN    | Τ %                    | UNIT PRIC    |        |
| S                    | SALES                     |   | DESCRIF      |                |             | QUA                   | NTITY         |            | T %                    |              | E      |



## 3. Sales Order view after Applying the Promotion.

|                                 | Posting Prepare O                   | Order Request Approval Pri                        | int/Send Navi    | igate Action   | s Navigate           | Fewer options              |                                   |                    |                            |              |          |
|---------------------------------|-------------------------------------|---|------------------|----------------|----------------------|----------------------------|-----------------------------------|--------------------|----------------------------|--------------|----------|
| General                         |                                     |   |                  |                |                      |                            |                                   |                    |                            |              | Show     |
| Sustomer Name                   |                                     | Adatum Corporation                                |                  | $\sim$         | Due Date             |                            |                                   | 5/2/2019           |                            |              |          |
| Contact · · · · · · · · · · · · |                                     | Robert Townes                                     |                  |                | Requested            | Delivery Date              |                                   | 4/3/2019           |                            |              |          |
| Posting Date                    |                                     | 4/2/2019  |                  |                | External Do          | ocument No. · ·            |                                   |                    |                            |              |          |
|                                 |                                     |   |                  |                |                      |                            |                                   |                    |                            |              |          |
| Order Date                      |                                     | 4/2/2019  |                  |                |                      |                            |                                   |                    |                            |              |          |
| Drder Date                      | More options                        |   |                  |                | RESERVED             | UNIT OF<br>MEASURE<br>CODF | UNIT PRICE                        | LINE<br>DISCOUNT % | LINE<br>AMOUNT<br>EXCL VAT | ΩΤΥ ΤΩ SHIP  | QUANTITY |
| Drder Date                      | More options                        | 4/2/2019<br>ESCRIPTION<br>ILANTA Whiteboard, base | LOCATION<br>CODE | QUANTITY<br>12 | RESERVED<br>QUANTITY |                            | UNIT PRICE<br>EXCL. VAT<br>906.70 | LINE<br>DISCOUNT % |                            | QTY. TO SHIP |          |
| Under Date                      | More options<br>NO. DI<br>1996-S AT | ESCRIPTION  |                  | QUANTITY       | QUANTITY             | MEASURE<br>CODE            | EXCL. VAT                         |                    | AMOUNT<br>EXCL. VAT        |              |          |
| Drder Date                      | More options<br>NO. DI<br>1996-S AT | ESCRIPTION<br>TLANTA Whiteboard, base             |                  | QUANTITY       | QUANTITY             | MEASURE<br>CODE            | EXCL. VAT                         |                    | AMOUNT<br>EXCL. VAT        |              | QUANTITY |
| Drder Date                      | More options<br>NO. DI<br>1996-S AT | ESCRIPTION<br>TLANTA Whiteboard, base             |                  | QUANTITY       | QUANTITY             | MEASURE<br>CODE            | EXCL. VAT                         |                    | AMOUNT<br>EXCL. VAT        |              | QUANTITY |

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.

|   |              | Order Request Approval     | Print/Send Na    | vigate Action | s Navigate           | Fewer options   | 5                       |                    |                                 |              |                     |
|---|--------------|----------------------------|------------------|---------------|----------------------|-----------------|-------------------------|--------------------|---------------------------------|--------------|---------------------|
| General                                       |              |                            |                  |               |                      |                 |                         |                    |                                 |              | Show m              |
| ustomer Name                                  |              | Adatum Corporation         |                  | ~             | Due Date             |                 |                         | 6/1/2019           |                                 |              | [                   |
| Contact · · · · · · · · · · · · · · · · · · · |              | Robert Townes              |                  |               | Requested            | Delivery Date   |                         | 5/2/2019           |                                 |              | (                   |
| Posting Date                                  |              | 5/1/2019                   |                  |               | External De          | ocument No. · · |                         |                    |                                 |              |                     |
| Order Date                                    |              | 5/1/2019                   |                  |               |                      |                 |                         |                    |                                 |              |                     |
| ines Manage                                   | More options |                            |                  |               |                      | UNIT OF         |                         |                    | LINE                            |              |                     |
| TYPE  | N0.          | DESCRIPTION                | LOCATION<br>CODE | QUANTITY      | RESERVED<br>QUANTITY | MEASURE<br>CODE | UNIT PRICE<br>EXCL. VAT | LINE<br>DISCOUNT % | AMOUNT<br>EXCL. VAT             | QTY. TO SHIP | QUANTITY<br>SHIPPED |
|   | 1968-S       | MEXICO Swivel Chair, black |                  | 10            | -                    | PCS             | 123.30                  |                    | 1.233.00                        | 10           |                     |
| ltem  |              |                            |                  | 7             | -                    | PCS             | 35.60                   |                    | 249.20                          | 7            |                     |
| ltem<br>Item                                  | 1928-S       | AMSTERDAM Lamp             |                  |               |                      |                 |                         |                    |                                 |              |                     |
|   |              | AMSTERDAM Lamp             |                  |               |                      |                 |                         |                    |                                 |              |                     |
|   |              | AMSTERDAM Lamp             |                  |               |                      |                 |                         |                    |                                 |              |                     |
|   |              | AMSTERDAM Lamp             |                  |               |                      |                 |                         |                    |                                 |              |                     |
|   | 1928-S       |                            |                  | 1,482.20      | Total Excl.          | VAT (GBP)       |                         |                    |                                 |              | 1,482               |
|   | NO.          | MEXICO Swivel Chair, black |                  | 10            | QUANTITY             | MEASURE<br>CODE | EXCL. VAT<br>123.30     |                    | AMOUNT<br>EXCL. VAT<br>1,233.00 | 10           |                     |

2. Promotion Card Setup.

| Starting Date         1/1/2019         Imilian         Av           Ending Date         12/31/2019         Imilian         Initian   | alesperson Code -   |   | ~ S,  | AVED 2   |         |
|--|---|---|---|--|---------|
| General         Description       Buy \$1,800 of items and get gift       Sa         Starting Date       1/1/2019       A         Ending Date       12/31/2019       In  | ctivate   |   |   |  | -       |
| Description     Buy \$1,800 of items and get gift     Sa       Starting Date     1/1/2019     Im       Ending Date     12/31/2019     In   | ctivate   |   |   |  |         |
| Starting Date         1/1/2019         Imilian         Arr           Ending Date         12/31/2019         Imilian         Inin   | ctivate   |   |   |  |         |
| Starting Date         1/1/2019         Imilian         Arr           Ending Date         12/31/2019         Imilian         Inin   | ctivate   |   |   | $\sim$   |         |
| Ending Date  |   |   |   |  |         |
|  | iciude history  | •••••   |   |  |         |
|  | se AND Condition  |   |   |  |         |
|  |   |   |   |  |         |
| Condition Manage   |   |   |   | E  |         |
| SALES TYPE SALES CODE DESCRIPTION  |   | MINIMUN<br>QUANTIT  |   | MINIMUM<br>AMOUNT  |         |
| Item 1968-S MEXICO Swivel Cha  | iir, black  |   | 1   | 0.00   |         |
| Item 1928-S AMSTERDAM Lamp   | )   |   | 1   | 0.00   |         |
| Order  |   |   | 0   | 1,800.00   |         |
| SALES<br>TYPE SALES CODE DESCRIPTION   | QUANTI  | TY DISCOUT  | JT % III  | IT PRICE   |         |
| Item 1896-S ATHENS Desk  | a contra  |   |   |  |         |
|  |   |   | 0.00  | 0.00   |         |
|  | omotion.  |   | 0.00  | 0.00<br>✓ SAVED  | 1       |
| LLES ORDER I WORK DATE: 5/13/2019 (2) +<br>01002 · Adatum Corporation  |   |   | 0.00  |  | 0       |
| ALES ORDER   WORK DATE: 5/13/2019 (C) +<br>01002 Adatum Corporation<br>ccess Release Posting Prepare Order Request Approval Print/Send Navigate Actions Navig<br>eneral  | ate Fewer options   | erocuta e   |   | √ SAVED<br>Show no   | 0<br>re |
| LES ORDER I WORK DATE: 5/13/2019 (C) +<br>01002 Adatum Corporation<br>ccess Release Posting Prepare Order Request Approval Print/Send Navigate Actions Navig<br>eneral<br>attomer Name Adatum Corporation V Due D  | 8   |   |   | √ SAVED  | ©       |
| ALES ORDER I WORK DATE: 5/13/2019 (C) +<br>01002 Adatum Corporation<br>cocess Release Posting Prepare Order Request Approval Print/Send Navigate Actions Navig<br>eneral<br>ustomer Name Adatum Corporation V Due D<br>Robert Townes V Reque   | ate Fewer options   | 5/2/2019  |   | √ SAVED<br>Show no   | ©       |
| LES ORDER I WORK DATE: 5/13/2019   | Fewer options  Date  ested Delivery Date  | 5/2/2019  |   | √ SAVED<br>Show no   | ©       |
| LES ORDER I WORK LATE: 5/13/2019 (C) +<br>01002 Adatum Corporation<br>access Release Posting Prepare Order Request Approval Print/Send Navigate Actions Navig<br>eneral<br>actomer Name Adatum Corporation V<br>Robert Townes V<br>Strip Date Strip             | ate Fever options  ate Oelivery Date  UNIT OF   | 5/2/2019  | LINE  | √SAVED<br>Show m<br>E<br>E   |         |
| LES ORDER I WORK DATE: 5/13/2019   | Anter Pever options      Anter Pever options      Anter Pever options      Ested Delivery Date      Constant No.      UNIT OF      UNIT OF      EXC      EXC | PRICE LINE<br>L. VAT DISCOUNT %                                   | LINE<br>AMOUNT<br>EXCLUNT GTY. TO               | Show mo  |         |
| LES ORDER I WORK DATE: 5/13/2019 (C) +<br>01002 Adatum Corporation<br>access Release Posting Prepare Order Request Approval Print/Send Navigate Actions Navig<br>eneral<br>stomer Name Adatum Corporation V Request<br>stomer Name S/12/2019 (C) Request<br>transformer Name Nore options (C) Reserved Navigate Actions Reserved Navigate Actions Navigate (C) Request<br>transformer Name Nore options (C) Reserved Navigate Actions (C) Reserved Navigate (C) Reserved Navigate (C) Request<br>transformer Name Nore options (C) Reserved Navigate (C) R | Anter Pever options      Anter Pever options      Anter Pever options      Ested Delivery Date      Constant No.      UNIT OF      UNIT OF      EXC      EXC | 5/2/2019  | LINE  | Show m<br>Show m<br>E  |         |
| LES ORDER I WORK DATE: 5/13/2019   | ate Fever options  ate Fever options  ate Oelvery Date  UNIT OF  VED MCASURE UNIT  ACASURE UNIT  PCS  PCS  PCS  | 5/2/2019<br>5/2/2019<br>PRICE LINE<br>L. VAT DISCOUNT %<br>123.30 | LINE<br>AMOUNT<br>EXCLUAT<br>0TY.TO<br>1.233.00 | Show me<br>Show me<br>Show me<br>Show me<br>Show me<br>ShiP ShiP Per D<br>10   |         |
| ALES ORDER I WORK DATE: 5/13/2019  | E     Ever options      Atte Fever options      Date      Exted Delivery Date      MEASURE     UNIT OF     MEASURE     UNIT      CODE     Exc      PCS     PCS  | 5/2/2019<br>5/2/2019<br>PRICE LINE<br>L. VAT DISCOUNT %<br>123.30 | LINE<br>AMOUNT<br>EXCLUAT<br>0TY.TO<br>1.233.00 | Show m<br>Show m<br>E<br>ShiP<br>ShiP<br>ShiP<br>ShiP<br>ShiP<br>ShiP<br>ShiP<br>ShiP<br>ShiP<br>ShiP<br>ShiP<br>ShiP<br>ShiP<br>ShiP<br>ShiP<br>Show m<br>Show m<br>S |         |

 $\leftarrow$