Campaign Management – User Guide

Campaign functionality enables the following:

- Creating new campaigns by customer or customer posting group and based on campaign creating new sales orders.
- Copy campaigns.
- Copy rows from Excel to create new campaign.
- Possibility to make sales refunds based on campaign sales.

Settings

Open **Extension Management** and check if extension named 'BCS Itera Campaign Management' is installed. If not, please contact BCS Itera AS.

User Card settings

On **User Card** you need to set up **Contact Email address**.

Dimensions Setup

Field	Value
Code	Fill in manually.
Name	Fills automatically.
Code Caption	Fills automatically.
Filter Caption	Fills automatically.

Campaign Setup

Field Name	Usage
Campaign Nos.	Set up a campaign number series.
Campaign Dimension Code	To find campaign sales in General Ledger.
Campaign Notification Days	Required for sending an automatic email if your campaign is disapproved.

Campaign Setup

General

Campaign Nos. · · · · · · ·	CAMP ⌄	Campaign Notificatio... ·	3
Campaign Dimension ... ·	SALESCAMPAIGN ⌄		

Use

From Search open **Campaign List**.

On the Ribbon Click **New**.

Field Name	Usage
ID	Campaign number serial.
Description	Fill in manually.
Type	Approved Price/Open Price.
Status	Created/Confirmed/Partly Approved/Refused.
Date Entered	Fills automatically with current date.
Date of Sale	Based on this date, BusinessCentral is reviewing Item prices. Always at least +1 day compared to Date Entered.
Start Date	Start Date fill in manually.
Ending Date	Ending Date fill in manually.
Campaign Dimension Value	Fills automatically, same as ID.
Recipient of Notification	By default, the user who entered the campaign header.
Confirmation Time	Fills automatically, if Campaign is confirmed.

CP0001

Customers | Set to Customers | Add Items | Copy from another Campaign | ✓ Approve Campaign | ✗ Reject | Actions | Fewer options

General

ID	CP0001	Start Date	14.01.2020 📅
Description	Chair Campaign	Ending Date	21.01.2020 📅
Type	Approved Price ▾	Campaign Dimension Value	CP0001
Status	Confirmed ▾	Recipient of Notification	ITERA\MERILY ···
Date Entered	11.01.2020	Confirmation Time	11.01.2020 15:33
Date of Sale	12.01.2020 📅		

Customers must be assigned to the campaign before adding items to the campaign.

To do this, click on the Ribbon **Set to Customers**-> Filter **Customer Posting Group**. Then Click **OK**.

CP0001 CHAIR CAMPAIGN - SET TO CUSTOMERS ⬈

Filter: Bill-To Customer

✕ Customer Posting Group · · · | DOMESTIC ⌄ |

╋ Filter...

Filter totals by:

╋ Filter...

[OK] [Cancel]

If you want to make a campaign to only one Customer, delete redundant Customers.

Adding Items into the Campaign

Field Name	Usage
Item No.	Fill in manually.
Prediction	Fill in manually.

Campaign Price	Fill in manually or it will change if you fill in the Campaign Discount Percentage.
Item Description	Fills automatically based on Item No.
Basic Price	Fills automatically based on Item Card prices and the price depends on the Date of Sale.
Campaign Discount Percentage	Fill in manually or it will be calculated if Campaign Price is set up.
Sold Amount	Fills automatically.
Amount of Retail Sales	Fill in manually (minimum amount for the campaign prices).
Inventory	Fills automatically, based on the Inventory.
Line Input Time	Fills automatically if Campaign Price or Campaign Discount Percentage is filled.
Insertion Name	Fills automatically.
Time of Change	Fills automatically.
Modified by Name	Fills automatically.
Approver name	Fills automatically if campaign is confirmed.
Fixed Time	Fills automatically if campaign is confirmed.
Comment	Fill in manually.
Date of Sale	Fills automatically.
Start Date	Fills automatically.
Ending Date	Fills automatically.
Present in Campaigns	Fills automatically.
Status	Fills automatically.

CAMPAIGN CARD

CP0001

    Customers   Set to Customers   Add Items   Copy from another Campaign   ✔ Approve Campaign   ✖ Reject | Actions

Lines | Manage

Item No. ↑		Item Description	Basic Price	Campaign Discount Percentage	Sold Amount	Amount of Retail Sales	Inventory	Line
→ 1920-S	⋮	ANTWERP Conference Table	420,40	4,85	0	0	96	11.0

If user is finished creating campaign Click on the Ribbon **Approve Campaign**. With this all the lines in the campaign are automatically confirmed and time and status will be changed from Created to Confirmed.

Sales Order creating based on the Campaign.

Create new **Sales Order**

Confirmed campaign rows will be available after you fill in the **Order date** (must be between Date of Sale and Ending Date) and **Bill-to Customer** is the same as campaign Bill-to Customer No.

Approved prices will be taken from campaign rows. If Customer has line discounts then with approved prices, that will not be applied.

Open prices will be taken in pricelist.

All campaign item rows have campaign dimensions.

In General Ledger will be new field **Campaign ID** and will be filled with campaign dimensions.

On the Sales Order rows you find new field **Campaign ID** and it will be Carried on to the Posted Sales Invoices.

Return Orders with Campaign Sales

If you Click on the Ribbon **Process**-> **Get Posted Document Lines to Reverse**, you must see the same lines as you have in Sales Order including **Campaign ID**. It means all the campaign dimensions you had in the Sales Order will be on the Returns order.

Copy from Campaign

On the Ribbon Click **Copy from another Campaign**. Choose the Campaign you want to copy and what do you what to copy from there: Customers, Items, Predictions and Amounts. If new campaign is ready make sure that the campaign dates are different from the one you just copied (Date of sale, Start Date, Ending Date) otherwise you cannot Approve Campaign.

Manage

COPY FROM CAMPAIGN ↗

Campaign · · · · · | 1 | · · ·   Copy Predicti... · ⬤

Copy Custom... · ⬤   Copy Amount... · ⬤

Copy Items · · · · ⬤

OK   Cancel

Advanced use of Fields

Type:

- Approved Price – then the on the item rows you need to specify campaign prices and predicted quantities. Approved price has the priority and item card line discounts are not counted.
- Open Price- prices are for statistics. You do not need to set up prices for that because they are coming from item price list on the sales order.

Status:

- Created- new campaign is by default with value Created.
- Confirmed- You can confirm line by line or whole campaign at a time.
- Partly Approved- Until you haven't approved whole campaign rows, the status will stay partly approved for example some rows have status refused.
- Refused- Needed for statistics. You can refuse campaign at time or line by line. With approved price campaign then refused lines won't appear.

Automatic system controls

Item will not be repeated in the multiple campaigns. If accepting the campaign, the program will control if the Item is already represented in another campaign in this period for the Customer. If Yes, the system alerts user and user must erase the row in the campaign or choose item status refused.

Status change turning the campaign. If the campaign is already started (Date of sale is bigger or the same with today's date), then user can't change rows status to approved. Can change only to refused. If the campaign is already started and user need to change the price click on button Edit Campaign Price.

Date of sale- can't be later than start and end date. Start date can't be later than end date.

NB!

Item rows prices are calculated based on Date of Sales date. Campaign prices on rows are calculated 2 decimal places.

Coping rows from Excel. User needs rows in order: Item No, Prediction, Campaign Price. Copy these 3 rows and all other rows will be filled automatically.

If you change row information for example the price user sees new Modified by name and date/time. If user add comment into the row, then the Modified by name and date/time will not change.

For more information and pricing please contact BCS Itera AS:

https://www.itera.ee