DYNAVISION

Documentation:
Advanced Promotions

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1 Introduction

Welcome to the official manual of the Dynavision Advanced Promotions module.
This module allows the user to setup a wide variation and combination of promotions.
Each promotion has one or more conditions will be used to check the validity of the promotion and results (actions) that will occur when the promotion is applied on a document.

1.1 Discounts versus promotions

In Business Central terms, there are two different concepts: discounts and promotions.

The term **discount** is used when the cause and effect on a document is determined at the line level and the effect behaves transitively.
Example given: 5% discount on an item(group). 5€ discount on an item(group).

The term **promotion** is used when the cause and effect on a document can only be determined and applied when the document is completely entered.
The entirety of the document leads to the application of a promotion.
Example given: buy 5 different items and get a 6th item for free.

1.2 Approach to promotions

In the Dynavision Advanced Promotions module, there is a distinction between **Basic** Promotions and **Advanced** Promotions.

In the **Basic Promotions** there will always be one condition, being 1 item (*e.g. buy N times item X*), and a promotion is assigned based on that item (*e.g. get item Y for free*).
These promotions will be: buy n times item X, get item X or item Y for free, or get a certain discount.
A Basic Promotion could be applied instantaneously on the order.

In the **Advanced promotions**, there could be multiple conditions, where each condition supports more complexity, and more intricate promotions that are awarded as results. In an Advanced Promotion, we need to use an action button to (re)calculate the promotion.

There are three ways to create promotions in the Advanced Promotions module.
1. Creating a promotion starting from a **Promotion Template**,
2. Creating a promotion from a **custom template**, and
3. Setting up a promotion manually.

All approaches will be discussed in this manual.
Remark: if a template needs to be manually build, contact the promotion manager within your company in order to create this template.

2 Installation

2.1 Extension

The Dynavision Advanced Promotions module is a separate Business Central extension.
1. Choose the search icon, enter **Extension Management**, and then choose the related link.
2. Choose **Manage** in the Action bar on the page and choose action **Extension Marketplace**.
3. In the search bar, enter **Dynavision Advanced Promotions** and install this app.
4. Activate the trial as described in following **Get Started guide**.

3 Advanced Promotions Setup

1. Choose the search icon, enter **Advanced Promotions Setup**, and then choose the related link.
2. In the page that opens, the number series can be set up in the field **Promotion Nos.** Choose the action **Promotion Groups** to open the page with the list of Promotion Groups. *(See chapter 3.1.1 Promotion Groups)*
3. Choose the action **Promotion Templates** to view the list of promotion templates that are available. These templates can be used as a base to set up an advanced promotion. *(See chapter Advanced promotions)*
4. Choose the action **Download Latest Templates** to download the latest promotion templates provided by Dynavision.
5. Choose the action **Promotion Templates Metadata** (that can be found by choosing the action **Related** in the action bar) to open the **Promotion Template Metadata** page. On this page, the metadata is visible of the template entries. It is possible to change the **Template Type** from customer to Global and the other way around. It is also possible to **download a file** *(as a JSON file)*, **import a file**, and execute the action **Download Latest Templates** on this page.

3.1 Promotion Groups

Creating a Promotion Group makes it possible to divide items into groups to which specific promotions can be applied. An item can be part of only 1 Promotion Group. This promotional group has to be assigned on the item card.

The **Promotion Groups** page can be accessed in two ways.

Option 1
On the **Advanced Promotions Setup** page, choose the action **Promotion Groups**.

Option 2:
1. Choose the search icon, enter **Promotion Groups**, and then choose the related link.
2. On the page that opens, the existing promotion groups can be viewed and edited and it is possible to add new groups by inserting the information on an empty line or by choosing the action **New.**
   a. **Code**
      Specifies the code that is used to identify the Promotion Group.
   b. **Description**
      Specifies the description of the Promotion Group.
   c. **No. of Items**
      This column displays the number of items that are linked to this promotion group. When selecting this number, the page opens with the list of the linked items. *This list of items can also be opened by selecting the line of the group and choosing the action **Items**, which can be found by choosing **Promotion Group** in the Actions bar.*
3. After inserting the information of the Promotion Group, it is possible to select items that have to be assigned to the Promotion Group.
   Choose the action **Add Items**. A page opens of the items in the inventory and multiple items or one item can be selected. *Remark: only items that are not yet assigned to another Promotion Group will be shown in the list.*
   After selecting the item(s) and choosing **OK** the item is assigned to the Promotion Group. This Promotion group is filled in on the **Item Card** in the field **Promotion Group** in the **Prices & Sales Tab**.
   a. Items that were added to the promotion group can be viewed using the action **Items** in the tab **Promotion Group**. The items can also be viewed in the factbox on the promotion groups listpage.
   b. If items need to be removed from the promotion group, use the action **Delete items**, on either the Promotion Group Items page or in the factbox on the listpage.
4. It is possible to view the promotions that are set up for the Promotion Group.
   Choose the action **Promotions** that can be found by choosing **Promotion Group** in the Actions bar. This action will open the **Promotions** view.
   a. In this view, it is also possible to add a new promotion assigned to this Promotion Group. (The actions can be found by choosing **New** in the Actions bar). The creation of the promotion is described further in the manual.

3.2 Create Item Charge

Certain promotions require for an Item Charge to be created.
1. Choose the search icon, enter **Item Charges**, and then choose the related link.
2. Fill in the information required to set up the item charge.
    a. **No.**
        Specifies the code that will be used in order to add Item Charges when a promotion applies.
    b. **Description**
        Specifies a description of the item charge.
    c. **Gen. Prod. Posting Group**
        Specifies the item charge's product type to link transactions made for this item charge with the appropriate general ledger account according to the general posting setup.
    d. **VAT Prod. Posting Group**
        Specifies the VAT specification of the involved item or resource to link transactions made for this record with the appropriate general ledger account according to the VAT posting setup.
    e. **No Payment Discount**
        This value is inherited from the VAT Prod. Posting Group and is inherited to the sales lines. <u>When enabled</u>, this setting will prevent the item charge from being discounted by the payment discount settings.
    f. **Search Description**
        Specifies text to search for when you do not know the number of the item charge.

4 Basic Promotions

4.1 Creation of basic promotion

The creation of promotions, basic and advanced, can be done through the **Promotions** page.

1. Choose the search icon, enter **Promotions**, and then choose the related link.
2. Choose the action **New**, and choose the **New Basic Promotion** action to set up a basic promotion. *This way, a basic promotion can be set up without the use of a template.*
3. On the **Promotion Card** that opens, fill in the necessary information to set up the basic promotion.
   a. **General Tab**
      i. **Description**
         The description of the promotion.
      ii. **Description 2**
         The extended description of the promotion if applicable.
      iii. **Type**
         Specifies the type of promotion that is set up.
         The options are:
         - Free Same Item,
         - Free Other Item, and
         - Add Line (Amount),
         - Add Line (percentage),
         - Multiple.
            a. If **Multiple** is selected, it is possible to define multiple results that will be added to the document when the promotion is met. Per result line, the parameters can be set for the result line.
            Add result lines by choosing action **New** next to results. Edit the result lines using the action **Edit.**
      iv. **Source Type**
         Specifies the type of entity to which the promotion is assigned. This is the audience that will be offered the promotion.
         The options are:
         - All Customers,
         - Customer,
         - Customer Price Group,
         - All Vendors, and
         - Vendor.
      v. **Source Code**
         If the Source Type is Customer, Customer Price Group or vendor, the entity to which the promotion is assigned needs to be specified.
      vi. **Source Description**
         The description of the selected Source Code will be Displayed.

vii. **Additional Filters**

Specifies additional filters to limit the sales/purchase documents on which the promotion applies.

viii. **Validity Period**

Specifies the period of validity of the promotion. A Date formula can be entered, which will be used to calculate the **Valid To** date based on the chosen **Valid From** date.

ix. **Valid From**

Specifies the starting date from which the promotion is valid.

x. **Valid To**

Specifies the ending date of the promotion. The promotion will not be applied if the date of the document is later than this specified date.

xi. **Template**

Specifies if the promotion is a template.

xii. **Enabled**

Specifies if the promotion is active and will be applied if the conditions are met in the corresponding documents.

b. **Conditions Tab**

i. **Minimum Quantity**

The minimum quantity that needs to be inserted for the item in order for the promotion to apply.

ii. **Unit of Measure Code**

The Unit of Measure that needs to be selected for the item in order for the promotion to apply. It is also possible to select the invoicing UOM in this field.

iii. **Allow Different Units**

If this is **disabled**, the promotion is only valid when items are added with the exact selected Unit of Measure Code specified in the conditions.

Example given: Leffe BAK24 (qty 2), will only give a promotion if there is a sales line with UOM BAK 24 of Leffe, with qty >= 2.

If this option is **enabled**, the system will convert the quantity specified on the line of the document to the base unit of measure, to make it possible to use commercial units of measures to determine if a promotion should be applied.

Example given: Cola gives a promo when 12 bottles are purchased, set up the promotion with UOM bottle, and the option enabled. When on the sales line there are e.g. 1 six pack and 6 bottles added, the promotion will trigger.

- **Remark**: this can only be used when the Unit of Measure that is set as condition in the promotion is set to the base unit of measure of the item.

  Example given:

  Promotion is set for BOTTLE, and this option is enabled, than the promotion will also take into account the lines with UOM BOX06 for the promotion.

  If the promotion is set for BOX24, the promotion will not take the

lines with BOX06 into account, it will take however BOTTLE into account.

> iv. **Type**
> Specifies the value of the type field to which the promotion is assigned. The options are:
> - Item,
> - Item Category,
> - Promotion Group.
>
> v. **No.**
> Specifies to which entity the promotion is assigned. The list from which can be selected depends on the chosen **Type** of entity to which the promotion is assigned.
>
> vi. **Description**
> The description of the selected entity.

c. **Free Same Item/ Free Other Item**
   *Shown if the selected **Type** of the Promotion is Free Same Item or Free Other Item.*

> i. **No.**
> Specifies the item that will be added to the document if the conditions for the promotion are met.
> If the chosen promotion **Type** is **Free Same Item**, the item that can be chosen is an Item Charge.
> If the chosen promotion **Type** is **Free Other Item**, the item that can be chosen is another item that is defined in the system.
>
> ii. **Description**
> If another item is chosen, this field will display the description of the item. If an Item charge is chosen this will display the Item charge description. This description can be changed. This is the description that will be shown on the extra added line and will be printed on the documents if the promotion applies.
>
> iii. **Description 2**
> *Shown if promotion **Type** is **Free Same Item**.*
> The extended description for the Item Charge.
>
> iv. **Quantity**
> The Quantity that will be inserted on the extra added line. This is the number of free items that is given when the conditions are met.
>
> v. **Unit of Measure Code**
> The Unit of Measure that will be inserted on the newly added extra line for the free item.

      vi. **Quantifier**

Specifies how many times the promotion can be applied to the same order.

The options are:

- **Once**

  The promotion will only be added once to the document.

- **Per minimum quantity**

  The promotion will be reapplied each time the condition of the promotion is met. *E.g. when there are 4 items sold, 2 euro discount is given; when there are 8 items sold, 4 euro discount is given.*

- **Per quantity sold**

  The promotion will be reapplied for the quantity that is noted on the line for the item that triggers the promotion. *E.g. when there are 4 items sold, 8 euro discount is given; when there are 8 items sold, 16 euro discount is given.*

d. **Add Line (Amount)**

*Shown if the selected **Type** of the Promotion is Add Line (Amount).*

    i. **Line Type**

The type that will be inserted on the newly added line in the documents.

The options are:

- G/L Account,
- Item,
- Resource,
- Fixed Asset,
- Charge (Item), and
- Allocation account.

    ii. **No.**

Depending on the chosen **Line Type**, the entity can be selected that will be inserted on the newly added line.

    iii. **Description**

The description of the chosen entity will be displayed. This can be changed if another description needs to be displayed for the promotion line in the documents.

    iv. **Description 2**

The extended description for the promotional line.

    v. **Quantity**

The Quantity that will be inserted on the extra added line. This is the number of free items that is given when the conditions are met.

    vi. **Unit of Measure Code**

The Unit of Measure that will be inserted on the newly added extra line.

    vii. **Unit Price**

The Unit price that will be inserted on the newly added line. *If the promotion is a discount, a negative amount needs to be specified.*

        viii. Quantifier
Specifies how many times the promotion can be applied to the same order.
The options are:

- **Once**
  The promotion will only be added once to the document.
- **Per minimum quantity**
  The promotion will be reapplied each time the condition of the promotion is met. *E.g. when there are 4 items sold, 2 euro discount is given; when there are 8 items sold, 4 euro discount is given.*
- **Per quantity sold**
  The promotion will be reapplied for the quantity that is noted on the line for the item that triggers the promotion. *E.g. when there are 4 items sold, 8 euro discount is given; when there are 8 items sold, 16 euro discount is given.*

e. **Add Line (Percentage)**
*Shown if the selected **Type** of the Promotion is Add Line (Percentage).*

    i. Line Type
The type that will be inserted on the newly added line in the documents.
The options are:

- G/L Account,
- Item,
- Resource,
- Fixed Asset,
- Charge (Item), and
- Allocation account.

    ii. No.
Depending on the chosen **Line Type**, the entity can be selected that will be inserted on the newly added line.

    iii. Description
The description of the chosen entity will be displayed. This can be changed if another description needs to be displayed for the promotion line in the documents.

    iv. Percentage
The percentage that will be calculated on the new line. This percentage will be applied on the line total of the item that triggers the promotion, and the result will be noted as unit price on the new line.

4. **In the Fact box pane**, in the **Summary** section, the effect of the promotion is noted. This can be useful to check that the promotion is set up correctly and will yield the expected result when it is applied.

5. Choose the action **Select Items…** if the promotion is set up for different items. After selecting the items, in the **Conditions Tab** the action **Multiple Conditions** will be shown.
Remark: it is not possible to assign a promotion based on a combination of items that are present on the document, so it is not possible to specify that the promotion is valid if item A is present AND item B.
   a. It is also possible to specify for which item, promotion group or item category the promotion is not valid. This can be done by selecting this entity and checking the **Exclude** checkbox on the Promotion Conditions page.
   This page can be opened by choosing the **Multiple Conditions** action if this is displayed, or by choosing the action **Conditions**, which can be found by choosing **Promotion** in the Actions bar.
   b. *Example Given: the promotion applies to the Promotion Group WINES, with the exception of the Item Figuero 4, which will be excluded from the promotion.*

Using the **Test…** action, the set up basic promotion can be tested. The result will be shown, without prices.
Remark: *Basic promotions don't accumulate / don't work across multiple lines.*

5 Advanced promotions

Advanced promotions can be created by manually going through the setup, copying an existing promotion or by starting from a predefined template.
Because it is quite complex to configure an advanced promotion from scratch, starting from a template is always suggested.

5.1 Download Templates

Global Promotion Templates are managed in a master environment and are made available to anyone who wishes to use the Dynavision Advanced Promotions module.
The templates must be downloaded in order to be used.
When there is an update of the downloaded templates, or new templates are defined in the master environment, the templates will need to be downloaded again in order to be updated.

1. Choose the search icon, enter **Promotion Template Metadata**, and then choose the related link. *The page can also be accessed by navigating to the **Advanced Promotions Setup page** and choosing the action **Promotion Templates**.*
2. In order to download the templates or update the existing templates when there has been an update in the master environment, choose the action **Download Latest Templates**.

*Remark: downloading the templates does not affect custom made templates based on the template that is updated (**Template Type Customer**). Templates with **Template Type Global** will be updated.*
If an existing template is changed, and a custom template is based on this template, that custom template will not be updated.
For modifications to the master file, contact the partner manager of the product deployment team.

5.2 Creating promotions from template

The creation of promotions, basic and advanced, can be done through the **Promotions** page.
1. Choose the search icon, enter **Promotions**, and then choose the related link.
   a. *It is possible to define default dates that should be filled in in the date fields of the promotions that are created. Choose **Set dates** in the message that is displayed on the page to define the dates.*
   b. *Enter a **Valid From** and a **Valid To** date and choose **ok.***
   c. *The dates will now be filled in when a promotion is created.*
   d. *The dates can be cleared or changed by choosing the link **Cleare dates**, or **Update dates**, shown when default dates are set.*
2. Choose the action **New**, and choose the **New from Template** action. A wizard will open that guides the user through the necessary steps to set up the advanced promotion.

5.2.1 Step 1 - Select Promotion Template

Select the template of the promotion that is set up from the list of available templates. Choose the action **View** in order to view more information of the template.
Remark: the promotion templates are set up for two different use cases. The use case is visible in the Code of the template, which can be added to the promotion list by personalizing. There are two options:
- ***S***: *Sales header (table 36), this promotion will be applied on a sales document (sales quote, sales order or sales invoice);*
- ***P***: *Purchase header (table 38), this promotion will be applied on a Purchase document (purchase quote or order).*

If the promotion needs to be valid on both sales and purchase documents, the promotion will need to be created separately for each option.

5.2.2 Step 2 - Fill in the header fields

Fill in the necessary fields in order to set up the promotion.

1. **New Promotion Code**
   Specifies the code that is used to identify the promotion.
2. **Description**
   Specifies the description of the promotion.
3. **Record Filter**
   Specifies a filter that should be applied. This way it is possible to set up a promotion for a specific customer or document type. It is possible to apply a filter on any field of the selected table (Sales/purchase Header or document lines).
   A record filter on the header of the promotion is always more performant than adding that same filter as a condition. E.g.: It is more performant to say that customer code must equal K0007 in the record filter, than to add it as a condition in the promotion itself.
4. **Use AND Operation**
   When enabled, this will apply an AND operation on the conditions that are set for the promotion. This means that all individual conditions must be valid before the entire promotion is valid.
   Otherwise, if not checked, the OR operator will be used.
5. **Valid From**
   The starting date from which the promotion is valid. If empty, the promotion is not valid and will not be checked or applied.
6. **Valid To**
   The ending date of the promotion. When a document is created with a later date than this date, the promotion will not be validated and added.
7. **Instant Promotion**
   This indicates if the promotion should be immediately applied when it is valid.
   Remark: for performance reasons, it is only possible to use this on promotions that use the condition "contains line".
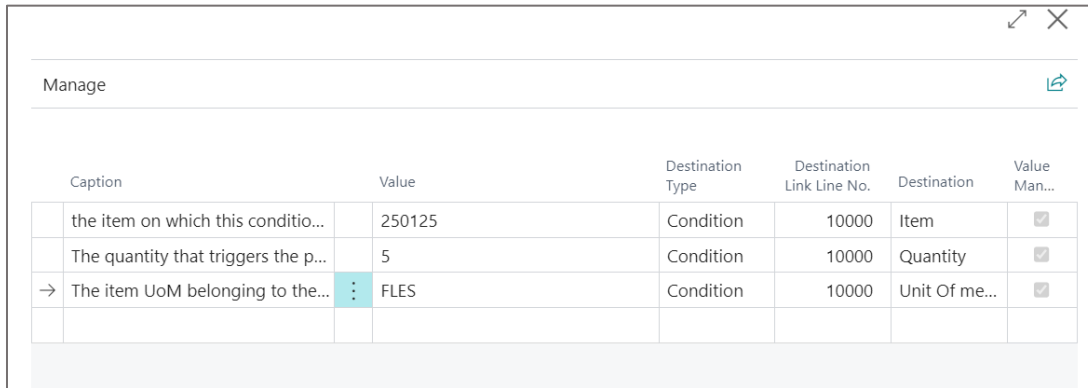
5.2.3 Step 3 - Fill in the input parameters

In order to set up the conditions and the result of the promotion, parameters need to be filled in.
These parameters differ for each template that is set up.

For example: buy 5 bottles of Jupiler and get 1 bottle for free.

Choose the action **OK** to complete the wizard and create the promotion.

5.3 Modify From Template

If it is necessary to modify an advanced promotion that has been created, select the promotion that needs to be modified and choose the action **Modify From Template**.
After choosing this function, the screen opens in which the parameters can be edited that are used as condition and result of the promotion.

5.4 Apply promotions to documents

When the promotion is set up and enabled the promotion can be checked and applied to the corresponding documents (based on the set up of the promotion, sales documents or Purchase documents).
In the next part of this section, sales order will be used to describe the execution of the advanced promotion.

1. Navigate to **Sales Orders** and choose the action **New** to create a new sales order or select an existing sales order.
2. Add the items to the order and the corresponding quantity in order for the conditions to be met and the promotion to apply on the document.
3. Choose the action **Check for Promotions** in order to validate the document. This action will check if a promotion is applicable to the document based on the input. In case a promotion is applicable, this promotion will be shown in the screen that opens. *Remark: if a promotion is set up as an instant promotion, the promotion will be executed once the inserted lines meet the conditions. These promotions will not be shown in the **Valid Promotions** screen.*
4. By default, in the **Valid Promotions** screen that opens, all possible valid promotions will be checked to be applied. This can be unchecked by selecting the line of the promotion to not apply and choosing the action **Toggle Apply Promotion**, that can be found by selecting the **3 points** next to the **Search icon** on the page.
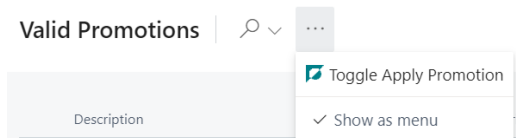
5. After checking the promotions that need to be applied, choose the action **OK** to apply the selection.
6. The line(s) for the promotion(s) will be added to the document.

5.4.1 Remarks

- If the document is edited after applying a promotion, the promotion will not be updated automatically. The action **Check for Promotions** needs to be executed again after making the changes.
  When choosing this action, the system will remove any previous applied promotions and recalculate everything.
- If the lines on the document are recreated, the advanced promotion lines will be deleted. The action **Check for Promotions** needs to be executed again to re-add the result line to the document.
- The system allows promotions to overlap *(multiple valid promotions in a certain period for the same entities)*.
  If this is not allowed, it is the user's responsibility to ensure that there are no overlapping promotions.
- The system always checks every promotion. Filters and conditions at the header level are more performant than those at the line level. It is always recommend to work with a maximum of 50 active promotions.

5.5 Creating advanced promotions manually

It is possible to create promotions without using a template. It is important to test this promotion in order to make sure that it is set up correctly and the desired result is given when the desired conditions are met.
Remark: always create a new document when testing the new setup. Using existing documents that already have promotions applied can lead to invalid results and behavior.

The creation of promotions, basic and advanced, can be done through the **Promotions** page.
1. Choose the search icon, enter **Promotions**, and then choose the related link.
2. Choose the action **New**, and choose the **New Advanced promotion** action.
3. On the **Promotion Card**, enter the necessary fields to set up the advanced promotion.
    a. **Code**
       Specifies the code that is used to identify the promotion.
    b. **Description**
       Specifies the description of the promotion.
    c. **Description 2**
       The extended description of the promotion.
    d. **Source Table**
       Specifies the Source Table of the promotion. *E.g. 36 Sales Header.*
    e. **Source Table Name**
       The name of the selected Source Table will be displayed.
    f. **Record Filter**
       Specifies a filter that should be applied. This way it is possible to set up a promotion for a specific customer or document type. It is possible to apply a filter on any field of the selected source table.
       A record filter on the header of the promotion is always more performant than adding that same filter as a condition. E.g.: It is more performant to say that customer code must equal K0007 in the record filter, than to add it as a condition in the promotion itself.
    g. **Use AND Operation**
       When enabled, this will apply an AND operation on the conditions that are set for the promotion. This means that all individual conditions must be valid before the entire promotion is valid.
       Otherwise, if not checked, the OR operator will be used.
    h. **Validity Period**
       Specifies the period of validity of the promotion. A Date formula can be entered, which will be used to calculate the **Valid To** date based on the chosen **Valid From** date.
    i. **Valid From**
       The starting date from which the promotion is valid. If empty, the promotion is not valid and will not be checked or applied.
    j. **Valid To**
       The ending date of the promotion. When a document is created with a later date than this date, the promotion will not be validated and added.

k. Instant Promotion
This indicates if the promotion should be immediately applied when it is valid.
Remark: when the promotion is complex, the application of the promotion as instant promotion will slow down the system, use carefully.

l. Template
Specifies if the promotion is a template.

m. Enabled
Specifies if the promotion is active and will be applied if the conditions are met in the corresponding documents.

n. Conditions
Specify the conditions that need to be met in order for the promotion to apply.

    i. Type
This field controls the behavior of the promotion. There are different types with each having a completely different implementation.

- **Header Check**
  This option checks if a certain header condition is met.
  E.g. When the document total is more than 5000, give a discount.
  <u>*Mandatory fields*</u>: *End table and Formula.*

- **Contains Line**
  This option checks if a certain line is present on the document.
  E.g. if a certain item is added to the document, get an item for free.
  <u>*Mandatory fields*</u>: *End table, Relation Route and Formula.*
  <u>*Optional fields*</u>: *End table filter.*

- **Line Summation**
  The condition is checked across all lines of the document. The summation, based on the formula, will be checked.
  E.g. Buy N items of item attribute A.
  <u>*Mandatory fields*</u>: *End table, Relation Route, Line Relation Route and Formula.*
  <u>*Optional fields*</u>: *End table filter.*

    ii. Description
A description of the condition. This description is purely informational.

    iii. End Source Table
The table in which the condition needs to be checked. *E.g. when a certain Item Attribute needs to be checked, choose the table 7501 – Item Attribute Value.*

    iv. End Source Table Name
The name of the selected End Source Table will be displayed.

    v. Relation Route
The relation route from the header to the end table. This is based on Table mappings that are set up in the system.

    vi. Line Relation Route
The relation route from the header to the line of the document. This is based on Table mappings that are set up in the system.

vii. **End Table Filter**
Specifies the filter that should be applied on the record set of the end table. *E.g. Type: Item, No. Item A*

viii. **Formula**
The formula that should be applied. You can enter field wildcards using the following format "F%<fieldno>".
A formula can also have an AND operation, which means that both equations should be valid.
Example:
*F%15 >= 5 * F%5404 AND F%5407 eq PIECES*
F%15 is the "Quantity" field on the sales line table.
F%5404 is the "Qty. Per Unit Of Measure" field on the sales line table.
F%5407 is the "Unit Of Measure Code" field on the sales line table.
The formula indicates that the quantity multiplied by the qty. per UOM should be greater or equal then 5 for sales lines that have a unit of measure code equal to PIECES.

o. **Results**

i. **Type**
This field controls the behavior of the promotion. There are different types with each having a completely different implementation.

- **Modify Header**
  Modifies a value on the header of the document.
  E.g. change the field Payment discount and insert 5%.
  Mandatory fields: End Source table and End Table Field No.
  Optional Fields: New Value and Use Validation.

- **Modify Condition**
  Modifies a value on all records that where valid in the linked condition line.
  E.g. insert 5% in the line discount field of all lines of Item A.
  Mandatory fields: Modify Line No., End Source Table, and End Table Field No.
  Optional fields: New Value and Use Validation.

- **Create Line**
  Creates a new line based on the selected **Create Line Code**.
  E.g. create a new line based on the information of item A with line discount 100%.
  Mandatory fields: Create Line Code.

- **Apply Item Charge**
  Creates a new line with type Charge Item and distributes the line to the linked lines from the condition.
  E.g. Add a line for shipping cost when the weight of the items is more than 10 kg.
  Mandatory fields: Create Line Code, Modify Line No.
  Optional fields: Item Charge Method.

- **Modify Lines**
  Modifies the lines based on the defined relation and filter. The lines that meet the filter are modified.

E.g. Modify all lines with a quantity >= 15 and set the Discount percentage to 5%.
Mandatory fields: End Source Table, End Table Field No and Relation Route.
Optional fields: Line Filter, New Value and Use Validation.

- **Apply Discount**
  Creates a discount charge line and distributes this charge over all lines based on the linked condition line.
  E.g. If a certain item is added to the document, add a line with negative value and distribute to this line.
  Mandatory fields: End Source Table, Modify Line No., Create Line Code, End Table sort Field No., End Table Quantity Field No. and Discount Quantity.
  Optional fields: Calculation Type, Sort Type and Quantity Modify Condition Line No.

ii. **Description**
A description of the result. This description is purely informational.

iii. **End Source Table**
The table on which the result will be applied.

iv. **End Source Table Name**
The name of the selected End Source Table will be displayed.

v. **End Table Field No.**
The field of the end table on which the result will be applied.

vi. **End Table Field Caption**
The caption of the selected field will be displayed.

vii. **Use Validation**
Specifies if the value in the selected end table field needs to be validated.

viii. **New Value**
The new value that will be inserted in the selected field. This needs to be used when using the modify lines of modify header.

ix. **Create Line Code**
The code of the **Create Line Header** record that should be used when applying the result.

x. **Modify Condition Line No.**
Specifies the line on which the result will have effect if applicable, e.g. when changing the line discount percentage on the line that triggers the promotion.

xi. **Calculation Type**
The calculation type of the action. This controls the amount of times an action can be executed.
The options are:

- **Fixed**
  The action can only be performed once in the same document.
- **Multiple**
  The action can be performed multiple times, each time the condition is met.

    xii. **Item Charge Method**

Specifies the method of distributing the Item Charge if used.
The options are:
- Equally,
- By Amount,
- By Weight,
- By Volume, and
- By original Quantity.

    xiii. **Line Filter**

The filter that should be applied on the list of valid lines (on which the result will be applied).

    xiv. **Relation Route**

Defines the relation route to the end table.

    xv. **End Table Sort Field No.**

Specifies the field that should be used to sort on. *This is needed in scenario's where e.g. the cheapest item is given for free. Cheapest is indicated by price, in this example the field on which to sort is the unit price field.*

    xvi. **End Table Quantity Field No.**

Indicates the field that contains the quantity in the end table.

    xvii. **Sort Type**

Specifies the sorting method that needs to be used to sort the chosen End Table Sort Field No. This can be ascending or descending.

    xviii. **Discount Quantity**

Specifies the quantity that will be discounted when/each time the promotion applies.

    xix. **Discount Percentage**

Specifies the percentage discount that has to be applied on the line. This can be used when the result type is **apply discount** to calculate the promotion amount that will be noted on the item charge line that is created by the promotion.
This percentage is calculated, using the unit price that is noted on the line that is noted in the **Modify Condition Line No.**

    xx. **Quantity Condition Line No.**

The condition line No. that should be used as base for the promotion when calculating the quantity to apply in the promotion.

4. After all conditions and results are filled in and set up, **Enable** the promotion in order to start using it.

5.6 Examples

In this chapter, some examples are given in order to make the theoretical of promotions more visible and show the theory with practical examples.
More examples for the templates can be fount by clicking following [link](#).

5.6.1 Case 1

In this case following promotion is set up: **Buy 2 containers (BAK) of Jupiler, receive one container (BAK) of Jupiler for free.**
The general fields on the promotion page are filled in first.

5.6.1.1 General fields

This promotion is set up to be applied on Sales Orders. The source table 36 is chosen, Sales header.
The starting and ending date are filled in. *Each promotion should have a start and end date, and we will not be applicable until it is enabled.*
Instant promotion ensures that when sales order lines are validated, the promotion will be immediately applied if the conditions are met. For performance reasons, this field is usually disabled.

After filling in the general information for the promotion, the promotional conditions are defined.

5.6.1.2 Promotional Conditions

To define that the condition for the promotion is the presence of 2 containers of beer on the sales lines, filters need to be defined.
The **filters** that will need to be defined are:
- **The item of promotion**: Jupiler;
- **The item Unit of Measure**: BAK;
- **The item quantity**: 2;

The result information will also have to be set for this promotion template.

- **Item Charge if the Promotion**: the Item charge has to be selected that will be added in case the promotion is triggered by the specified filters.
- **Description of the Promotion line**: the description that will be noted on the Item Charge line.

Below is a screenshot of the conditions rule on the promotion card:

	Type	Description	End Source Table	End Source Table Name	Relation Route	Line Relation Route	End Table Filter	Formula
→	Line Summa... ⋮	Buy N (pieces) of item A	37	Sales Line	T36T37	T36T37	VERSION(1) SORTING(Document T...	F%15 >= 2 and F%5407 eq BAK ...

1. **Type**
   As type, **Line** Summation is chosen.
   The <u>reason</u> that this type is chosen is because the system will need to run across several lines on the sales order to determine if two containers of Jupiler are added to the order.
   With a line type **Contains Line** the condition will not be met if there are *e.g.* two lines with each one container of Jupiler on the sales document. With this type, the two contains would be inserted on one line for the promotion to be applied.
2. **End Source Table**
   The End Source Table on this conditions line is table 37, Sales Line. This end table is selected because the check if the conditions are met will be done on the sales order lines.
3. **Relation Route**
   Here the relationship between the **Source Table** and the **End Source table** on the promotion conditions line is defined. In this example the relationship between table 36, Sales Header, and table 37, Sales Line.

	Code ↑		From Table No.	From Table Caption		To Table No.	To Table Caption
→	T36T37	⋮	36	Sales Header		37	Sales Line

Steps

	Step No. ↑	From Table No.	From Table Caption	From Field No.	From Field Caption	To Table No.	To Table Caption	Type	To Field No.
→	1 ⋮	36	Sales Header	1	Document Type	37	Sales Line	Field	1
	1	36	Sales Header	3	No.	37	Sales Line	Field	3

4. **Line Relation Route**
   Here the relationship between the conditions line **Type** and the promotion header is defined. The same table mapping as the **Relation Route** is used.
5. **End Table Filter:**
   The filter on Item Jupiler is set.

After entering these fields and choosing the action **OK**, following will be displayed in the **End Table Filter** field: VERSION(1) SORTING(Document Type, Document No., Line No.) WHERE(Type=FILTER(Item),No.=FILTER(310025)).

6. **Formula**
   Formulas and calculations are inserted in this field.
   In this example, the item quantity must be greater than or equal to 2, and the item Unit of Measure needs to be equal to BAK. This leads to the following formula: F%15 >= 2 and F%5407 eq FLES
   a. **Field 15** is the qty field in table 37.
   b. **Field 5407** is the item Unit of Measure field in table 37.
   Remark: it is also possible to define the item Unit of Measure in the End Table filter.

5.6.1.3 Promotional Results

This defines what will happen when the promotion is valid and is applied on the document. In this example, the result of the promotion needs to be an item charge that is added, the free container of Jupiler.

1. **Type**
   A new line will need to be added to the document with the free container of Jupiler if the conditions are met. The chosen type is **Create new line code**. This will create a new line using the Create Line Code chosen in the corresponding field in the result line.

2. **Create Line Code**
   In this field, the code is noted which defines how the new line will be created and added to the document. The Type that is inserted on the line will be an item charge and the chosen charge is the Item Charge selected when setting up the promotion. The description that will be shown on the line is the Description defined when setting up the promotion.

5.6.2 Case 2

In this case following promotion is set up: **Buy 2 bottles of specialty beers, get 1 bottle for free**.

5.6.2.1 General fields

The general fields are set up in the same way as the fields were set up in Case 1.

5.6.2.2 Promotional Conditions

In order for the system to be able to determine that the lines of the document contain beers that belong to the **Item Price Group** SPECIAL BEER, filters need to be set.
- **Item Price Group**: SPECIAL BEER;
- **Item Unit of Measure**: bottle;
- **Item Quantity**: 2 ;

The result information will also have to be set for this promotion template.

- **Item Charge if the Promotion**: the Item charge has to be selected that will be added in case the promotion is triggered by the specified filters.
- **Description of the Promotion line**: the description that will be noted on the Item Charge line.

In the conditions line, following is set up:

1. **Line Type:**
   Line Summation is chose, because the system needs to run over several sales order lines to filter out the lines with the correct Item Price Group to determine if the conditions of quantity are met.

2. **End source table**

   There needs to be a filter set on Item Price Group. This field cannot be found on the sales order line, but needs to be checked in the related table 71097177, ESCP Item Price Group. This table is selected as the End Source Table.

3. **The relation route**

   The relationship between the table 36, sales header, and the table 71097177, ESCP Item Price Group needs to be defined.

Step No. ↑	From Table No.	From Table Caption	From Field No.	From Field Caption	To Table No.	To Table Caption	Type	To Field No.	To Field Caption
1	36	Sales Header	1	Document Type	37	Sales Line	Field	1	Document Type
1	36	Sales Header	3	No.	37	Sales Line	Field	3	Document No.
2	37	Sales Line	6	No.	27	Item	Field	1	No.
3	27	Item	71097175	Item Price Group	71097177	Item Price Group	Field	1	Code

   First the system will look at the sales header table 36 and the connection to the sales line, table 37 using Document Type and the Document No. as the first filters.
   After retrieving the Sales Lines that belong to the Sales Header, the items that are inserted on the retrieved sales lines are retrieved by mapping the No. on the Sales Line to the No. field in the Item table.
   When the item is determined, it is possible to look up the Item Price Group belonging to this Item by mapping the code that is selected in the Item Price Group field in the item to the Code field in the Item Price group in order to retrieve the information of the Item Price Group.
   Summarized: we go from 36 -> 37 -> 27 -> 71097177.

4. **Line Relation Route:**

   Here the relationship between the conditions line **Type** and the promotion header is defined. This will be the same Line Relation Route as in Case 1, T36T37.

5. **End table filter**

   The filter on the Item Price Group will be configured in this field.
   After selecting the Item Price Group in the filter screen and choosing the action **OK**, following will be displayed in the field: VERSION(1) SORTING(Code) WHERE(Code=FILTER(SPECIALBEER)).

6. **Formula**

   The only requirement here is that the quantity of the items that satisfy the filter is more than or equal to 2. The formula will be f%15 >= 2.

5.6.2.3 Result conditions

The Result line will be set up the same way as it has been set up in case 1. We add an Item Charge line to the document to process the free item.

5.6.3 Promotional Results examples

The examples below focus on the various promotional results.

5.6.3.1 Modify header

Modify header is used when a field on the header of the sales document needs to be modified if the conditions are met.
Following promotion is used as example: **if a customer purchases items for a total of more than 5,000 euros, give a Payment Discount of 10%**.

5.6.3.1.1   Promotional Conditions

The condition of this promotion needs to be checked in the header, this means the **Type** of the condition rule needs to be **Header Check**.
The document total can be found in field 60 in the sales header table.

Type	Description	End Source Table	End Source Table Name	Relation Route	Line Relation Route	End Table Filter	Formula
→ Header Che... ⋮	test	36	Sales Header				F%60 > 5000

5.6.3.1.2   Promotional Results

The result of this promotion, when the condition is met, is setting the Payment Discount percentage on the document.
Following Result Rule is set up in order to change the value in the field 25 to 10%:

Results   New Line   Delete Line

Type	Description	End Source Table	End Source Table Name	End Table Field No.	End Table Field Caption	Use Vali...	New Value
→ Modify Header ⋮		36	Sales Header	25	Payment Discount %	☑	10

5.6.3.2 Modify Condition

This result will adjust the lines of the document that have met the set condition for the promotion.
In this example, the line discount of the items are changed to 5% when the quantity of the item is more than 2.

5.6.3.2.1   Promotional Conditions

The condition for this promotion to apply is that the document contains a line the value in the field 15, Quantity of the Sales Line Field needs to be more than 2.

Conditions   New Line   Delete Line

Type	Description	End Source Table	End Source Table Name	Relation Route	Line Relation Route	End Table Filter	Formula
→ Contains Li... ⋮	If a line has a qty > 2	37	Sales Line	T36T37	T36T37	VERSION(1) SORTING(Document...	F%15 > 2

Promotional Results

The result that needs to be applied on the lines that satisfy the condition is filling in the Line Discount percentage with the value 5.

The condition line of the set up condition is set in order to link the condition and the rule.

	Type		Description	End Source Table	End Source Table Name	End Table Field No.	End Table Field Caption	Use Vali...	New Value	Create Line Code	Modify Condition Line No.	Calculation Type
→	Modify Co...	⋮	Set a line discount of 5%	37	Sales Line	27	Line Discount %	☑	5		10000	Fixed

5.6.3.3 Create Line

This result create a new line in the document if the conditions of the promotion are met. In this example, when a customer buys 2 bottles of chardonnay, they get a free box of chocolates.

Promotional Conditions

The condition for this promotion to apply is that the document contains (a) chardonnay item(s) with a quantity that is more than 2.

	Type		Description	End Source Table	End Source Table Name	Relation Route	Line Relation Route	End Table Filter	Formula
→	Line Summ...	⋮	>2 bottles chardonnay	37	Sales Line	T36T37	T36T37	VERSION(1) SORTING(Document...	F%15 > 2

The end table filter is set to item ART00014, which is the bottle of Chardonnay.
 VERSION(1) SORTING(Document Type,Document No.,Line No.)
WHERE(Type=FILTER(Item),No.=FILTER(ART00014))

Promotional Results

When the conditions are met, a line needs to be created with the free box of chocolate.

	Type		Description	End Source Table	End Source Table Name	End Table Field No.	End Table Field Caption	Use Vali...	New Value	Create Line Code	Modify Condition Line No.
→	Create Line	⋮	add a new line with other free ...	37	Sales Line	0		☑		GET FREE PR...	10000

The creation if this line is done using a **Create Line Code**. In this code, the line that needs to be created is specified as can be seen in the example in the image below.

A new line is created, the **Type** of this line is set to Item, the No. is Art00172 – box of Pralines, the description that will be shown in the line is defined, the quantity will be set to 1, and the Line Discount will be set to 100%.

5.6.3.4 Modify Lines

This result will adjust all lines of the document when the condition(s) of the promotions are met.
In this example, the line discount of the items are changed to 5% when the quantity of an item in the lines is more than 2.

5.6.3.4.1   Promotional Conditions
The condition for this promotion to apply is that the document contains a line the value in the field 15, Quantity of the Sales Line Field needs to be more than 2.

Type	Description	End Source Table	End Source Table Name	Relation Route	Line Relation Route	End Table Filter	Formula
Contains Li...	If a line has a qty > 2	37	Sales Line	T36T37	T36T37	VERSION(1) SORTING(Document...	F%15 > 2

5.6.3.4.2   Promotional Results
The result that needs to be applied on the lines that satisfy the condition is filling in the Line Discount percentage with the value 5 of all lines.

Type	Description	End Source Table	End Source Table Name	End Table Field No.	End Table Field Caption	Use Vali...	New Value	
Modify Lines	Set a line discount of 5%	37	Sales Line	27	Line Discount %	☑	5	

5.6.3.5 Apply discount

This result create a new line in the document if the conditions of the promotion are met and calculates a unit price or unit cost using the condition line and a specified percentage.
In this example, when a customer buys 2 crates of jupiler, they get a discount of 40% on the second crate.

5.6.3.5.1   Promotional Conditions

The condition for this promotion to apply is that the document contains (a) jupiler item(s) with a quantity that is more than 2.

	Type		Description	End Source Table	End Source Table Name	Relation Route	Line Relation Route	End Table Filter	Formula
→	Line Summation	⋮	Buy item A	37	Sales Line	T36T37	T36T37	VERSION(1) SORTING(Attribute ID.ID) WHERE(Valu...	F%15 >= 2

The end table filter is set to item 250125, which is the crate of jupiler.
 VERSION(1) SORTING(Document Type,Document No.,Line No.)
WHERE(Type=FILTER(Item),No.=FILTER(250125))

5.6.3.5.2   Promotional Results

When the conditions are met, a line needs to be created with the discount.

	Type		Description	End Source Table	End Source Table Name	End Table Field No.	End Table Field Caption	Use Vali...	New Value	Create Line Code	Modify Condition Line No.	Calculation Type
→	Apply Disc...	⋮	get discount on 2nd item	37	Sales Line			☐		PROM00139-...	0	Fixed

The creation if this line is done using a **Create Line Code**. In this code, the line that needs to be created is specified as can be seen in the example in the image below.
A new line is created, the **Type** of this line is set to a charge item in this example. The description that will be shown in the line is defined, the quantity will be set to 1, and the Line Discount will be calculated based on the entered parameter on the Apply Discount line in field **Discount percentage**.

6 Custom templates

6.1 Introduction

In case a custom promotion needs to be set up, because there is no existing template yet for the promotion, there are two possible options:
   1. The requested promotion is created as a global template, or
   2. The requested promotion is created as a custom template.

The creation of a global template for a newly requested promotion can be rejected for following reasons:
   1. The requested promotion is very niche dependent, and it will not be used in other businesses;
   2. The requested promotion relies on custom fields that only exist on the customer tenant;
   3. The requested promotion is too similar to an existing global promotion.

If the request for the creation of a global template is rejected, a custom template will need to be set up.

6.2 Creating a custom template

   1. Manually create the new promotion as described in section Creating promotions manually.
   2. In the **Promotions** page, select the manually created promotion and choose the action **Toggle as template**, which can be found by choosing **Actions** in the Actions bar.
   3. The promotion will be removed from the **Promotions** list and can be viewed in the Templates through the **Advanced Promotions Setup** using the action **Promotion Templates**.
   4. At the bottom of the **Promotion Card** of the newly created template, it is possible to change the **Promotion Template Request Lines**.
   5. After setting up the parameters with default values, it is possible to select this template when creating a new promotion in the **Promotions** page.

7 Default Dates for new promotions

Default dates can be configured to be added on newly created promotion cards.
If no dates are set as default, on the **Promotions** page, there will be a message shown **No defaults for new promotions**. Select the link **Set dates** to configure the dates that should be added by default on promotions that will be created (once the defaults are set).
Enter the dates in the report page that opens.
Once default dates are set, it is possible to **Update the dates** or to **Clear the dates**.

8 Promotions in combination with TRIMIT

8.1 Disable instant promotions

Normally, basic promotions will be applied instantly, after a line is entered on a sales document with specific parameters on the line. This can however be configured, so that the promotions will not be calculated and applied instantly, but only after choosing the action **Check for promotions**.

1. Choose the search icon, enter **Advanced Promotions Setup**, and then choose the related link.
2. In the **General** tab, enable the option **Disable Instant Promotions**. This will make sure that the promotion is only applied on a document after choosing the action, when all parameters for the promotion are added to a document.

8.2 Usage on document

Create the basic promotion as explained in section [Creation of basic promotion](#).
Enable the option **Disable Instant Promotions** in the Advanced Promotions Setup page.
Add the item lines tot he sales document with the set promotion parameters, so that the promotion is applicable on the document.
The promotion will not be automatically applied and added to the document, but choose the action **Check for promotions**. The promotion will be applied, and a notification will be shown.

Remark: *beware that, if advanced promotions are also set up for the same conditions (or an overlap of the conditions) of the basic promotion, the basic promotion will always be applied when the action* **Check for promotions** *is executed, even when only the advanced promotion is selected to be applied.*

8.3 Example

A user wishes to create following promotion: **buy two items, get one for free**. Following steps are taken in order to set up the promotion.

1. A **Promotion Group** is created and the items to which the promotion can apply are added to the group. The group is called WINES.
2. The user navigates to **Promotions** and adds a new Basic promotion using the action **New basic promotion**.
3. The promotion is set up as follows:

4. After setting up the promotion and making sure it is enabled, the sales documents can be created and the promotion will be applied.

A customer wants to buy 3 bottles of wine. The sales document is created and the items are added in the lines.
Because the customer orders 3 bottles, the condition of the promotion is met and the promotion will be applied on the order.

Remark: *Basic promotions don't accumulate / don't work across multiple lines.*