



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 or multiple conditions that are checked on one item line (e.g. *buy N times item X*), and a promotion is assigned based on that item line (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 will be typically applied instantaneously on the order.

In the **Advanced promotions**, there are one or 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 and the condition can be checked using multiple lines (e.g. *if the order contains x of item A, over multiple lines, then the promotion needs to be applied*).

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.

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. On the page the latest promotion templates can be downloaded. See chapter 5.1.

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.

Remark: the standard Business Central Item charges are used by the promotions module. If more information is needed, see the Microsoft Documentation.

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. When enabled, 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.

4.1.1 General Information

Firstly, set up the information in the **General Tab**.

1. **Description**
The description of the promotion.
2. **Description 2**
The extended description of the promotion if applicable.
3. **Type**
Specifies the type of promotion that is set up.
The options are:
 - a. Add discount line (Free same item),
 - b. Add item line (Free extra item),
 - c. Add amount line,
 - d. Add percentage line, and
 - e. Multiple.
 - i. 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**.
 - ii. **Remark:** *If a promotion was set up and the Type is changed to Multiple, the system will convert the current setup of the promotion.*
4. **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:
 - a. All Customers,
 - b. Customer,
 - c. Customer Price Group,
 - d. All Vendors,
 - e. Vendor, and
 - f. Campaign (only applicable on sales documents and if the option **Sales prices and/or Discounts** is activated on the campaign).

5. Source Code

If the Source Type is Customer, Customer Price Group, vendor or campaign, the entity to which the promotion is assigned needs to be specified.

6. Source Description

The description of the selected Source Code will be Displayed.

7. Additional Filters (optional)

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

8. Validity Period (optional)

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.

9. Valid From

Specifies the starting date from which the promotion is valid.

10. 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.

11. Template

Specifies if the promotion is a template.

12. Enabled

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

4.1.2 Conditions

Next, add the information in the **Conditions Tab**. This will determine when the promotion will be valid and applied on a document.

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

1. Type

Specifies the value of the type field to which the promotion is assigned.

The options are:

- a. Item,
- b. Item Category,
- c. Promotion Group.

2. Minimum Quantity

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

3. 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.

- a. **If type Item is selected**, the Items on which the promotion is valid can also be selected using the action **Add Items**. This makes it possible to set up one promotion, that is valid for multiple items without having to make duplicate promotions.

4. 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.

5. 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: Apples CRATE (qty 2), will only give a promotion if there is a sales line with UOM CRATE of Apples, 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: the market gives a promo when 12 pears are purchased then a promotion with UOM PCS needs to be set up, and the option enabled. When on the sales line there is e.g. 1 BOX (of 12 pears) added, the promotion will trigger.

- a. **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 PCS, and this option is enabled, then the promotion will also take into account the lines with UOM CRATE (24 PCS) for the promotion.

If the promotion is set for CRATE (24 PCS), the promotion will not take the lines with BOX (6 PCS) into account, it will take however PCS into account.

6. Advanced Item Filter

Specifies the advanced item filter that will be used to add certain items that will trigger the condition.

- a. When the Advanced Item Filter is selected, the items that adhere to the filter will be auto added as conditions.
- b. When the Advanced Item Filter is changed, the items that were auto added for the previous filter will be removed, and the new items will be added instead. If items were added manually, these will not be cleared.
- c. **Remark:** when there are updates to the items after selecting the item filter, the promotion will not be updated automatically. Use the action **Update items** on the promotion card to update the items that trigger the promotion, or **schedule the update** using a job queue entry.

7. Description

The description of the selected entity.

8. If multiple items are selected, in the **Conditions Tab** the action **Multiple Conditions** will be shown.

It is also possible to mix Items, Item categories and groups as conditions in the same promotion.

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(s) the promotion is not valid. This can be done by selecting this entity and checking the **Exclude** checkbox on the Promotion Conditions page.
 - i. 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.*

9. Depending on the selected promotion type, other parameters need to be filled in. This will be discussed in the subsections that follow.

4.1.2.1 Add discount line (Free same item)

*Fields shown if the selected **Type** of the Promotion Add discount line (Free same item).*

1. **No.**
Specifies the Item charge that will be added to the document if the conditions for the promotion are met.
2. **Description**
Displays the description of the chosen item charge.
The description can be changed if wanted, because this is the description that will be shown on the extra added line and will be printed on the documents if the promotion applies.
3. **Description 2**
The extended description for the Item Charge.
4. **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.
5. **Unit of Measure Code**
The Unit of Measure that will be inserted on the newly added extra line for the free item.
6. **Quantifier**
Specifies how many times the promotion can be applied to the same order.
The options are:
 - a. **Once**
The promotion will only be added once to the document.
 - b. **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.*
 - c. **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.*

4.1.2.2 Add item line (Free extra item)

Fields shown if the selected **Type** of the Promotion Add item line (Free extra item).

1. Same Item

When enabled, the promotion result automatically uses the same item as the condition item. This will disable the fields No. and Description.

When disabled, an extra item can be selected to be added to the document if the promotion applies.

2. No.

If Same Item is disabled.

Specifies the Item that will be added to the document if the conditions for the promotion are met.

3. Description

If Same Item is disabled.

Displays the description of the chosen item.

The description can be changed if wanted, because this is the description that will be shown on the extra added line and will be printed on the documents if the promotion applies.

4. Description 2

If Same Item is disabled.

The extended description for the promotional line.

5. 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.

6. Unit of Measure Code

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

7. Quantifier

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

The options are:

a. Once

The promotion will only be added once to the document.

b. 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.*

c. 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.*

4.1.2.3 Promotion Type Add amount line

*Fields shown if the selected **Type** of the Promotion is Add amount line.*

1. Line Type

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

The options are:

- a. G/L Account,
- b. Item,
- c. Resource,
- d. Fixed Asset,
- e. Charge (Item), and
- f. Allocation account.

2. No.

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

3. 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.

4. Description 2

If Same Item is disabled.

The extended description for the promotional line.

5. 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.

6. Unit of Measure Code

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

7. 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.*

8. Quantifier

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

The options are:

a. Once

The promotion will only be added once to the document.

b. 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.*

c. 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.*

4.1.2.4 Promotion Type Add percentage line

*Fields shown if the selected **Type** of the Promotion is Add percentage line.*

1. Line Type

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

The options are:

- a. G/L Account,
- b. Item,
- c. Resource,
- d. Fixed Asset,
- e. Charge (Item), and
- f. Allocation account.

2. No.

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

3. 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.

4. Description 2

The extended description for the promotional line.

5. 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.

- 6. 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.

4.1.3 Usage factbox

The usage factbox on the card displays the number of document lines and documents where the promotion has been applied.

4.1.4 Action Test

Using the **Test...** action, the set up basic promotion can be tested. The result will be shown, without prices.

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 by Dynavision 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 Dynavision support (support@dynavision.be).

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. 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:

- a. All Customers,
- b. Customer,
- c. Customer Price Group,
- d. All Vendors,
- e. Vendor, and
- f. Campaign (only applicable on sales documents and if the option **Sales prices and/or Discounts** is activated on the campaign).

4. Source Code

If the Source Type is Customer, Customer Price Group, vendor or campaign, the entity to which the promotion is assigned needs to be specified.

5. Source Description

The description of the selected Source Code will be Displayed.

6. 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.

7. 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.

8. 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.

9. 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 pcs of apple and get 1 pcs for free.

Manage 						
Caption	Value	Destination Type	Destination Link Line No.	Destination	Value Mandatory	
The item on which this condition is valid	Apple	Condition	10000	Item	☒	
The quantity that triggers the promotion	5	Condition	10000	Quantity	☒	
The item UoM belonging to the condition	PCS	Condition	10000	Unit Of measure	☒	
The item charge of the promotion	DISCOUNT	Result	20000	Item Charge	☒	
→ The line description of the Promotion line	⋮ Free item ⋯	Result	20000	New Line Descripti...	☒	
The Discount Percentage that will be applied	100	Result	20000	Discount Percenta...	☒	

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**.

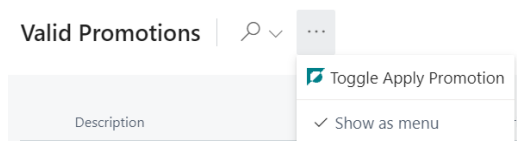
After choosing this function, the screen opens in which the parameters can be edited that are used as condition and result of the promotion.

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.

5.5.1 General information

Fill in the general information for the promotion.

1. **Code**
Specifies the code that is used to identify the promotion.
2. **Description**
Specifies the description of the promotion.
3. **Description 2**
The extended description of the promotion.
4. **Source Table**
Specifies the Source Table of the promotion. *E.g. 36 Sales Header.*
5. **Source Table Name**
The name of the selected Source Table will be displayed.
6. **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:
 - a. All Customers,
 - b. Customer,
 - c. Customer Price Group,
 - d. All Vendors,
 - e. Vendor, and
 - f. Campaign (only applicable on sales documents and if the option **Sales prices and/or Discounts** is activated on the campaign).
7. **Source Code**
If the Source Type is Customer, Customer Price Group, vendor or campaign, the entity to which the promotion is assigned needs to be specified.
8. **Source Description**
The description of the selected Source Code will be Displayed.

9. 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.

10. Validity Period (Optional)

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.

11. 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.

12. 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.

13. 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.

14. Template

Specifies if the promotion is a template.

15. Enabled

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

5.5.2 Conditions

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

1. Type

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

Depending on the selected type, different fields need to be filled in.

2. Evaluate

This specifies how the condition must evaluate in combination with other conditions on the promotion

a. Always Valid

When this option is selected, the condition line should always be valid, if this is not valid, the promotion will not be applied, even when other condition lines are valid in the condition.

b. Valid at least once

This option states that from all condition lines that have this option selected, **at least one** should be valid for the promotion to be applied. If none are valid, the promotion is not applied. If one or more are valid, the promotion will be applied.

5.5.2.1 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.

When this type is selected, following fields need to be filled in.

1. Description

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

2. End Source Table

The table in which the condition needs to be checked. This will be automatically filled in with the source table set in the general tab on the promotion. This will be 36 or 38.

This cannot be changed for this type of condition.

3. End Source Table Name

The name of the selected End Source Table will be displayed. *E.g. when table 36 is filled in as End Source Table, Sales Header will be displayed.*

4. 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.

Remark: *the order of the signs used is important, e.g. >= will work, but => will not work.*

*When comparing textual values, the operator **eq** needs to be used to find values that equal the entered information.*

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.

5.5.2.2 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.

When this type is selected, following fields need to be filled in.

1. Description

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

2. 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.

3. End Source Table Name

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

E.g. when table 7501 is chosen, Item Attribute Value will be displayed.

4. Relation Route

	Code ↑ ▼	From Table No.	From Table Caption	To Table No.	To Table Caption
→	T36T7501	36	Sales Header	7501	Item Attribute Value

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	Value
→	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.	7505	Item Attribute Value Mapping	Field	2	No.	
	3	7505	Item Attribute Value Mapping	4	Item Attribute Value ID	7501	Item Attribute Value	Field	2	ID	

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

E.g. when mapping to the Item Attribute Value, the Relation Route will be T36T7501.

This Route will map how to go from the sales header (T36) to the Item Attribute Value of the item on the sales line.

5. Line Relation Route

The relation route from the (sales/purchase) header to the (sales/purchase) line of the document. This is based on Table mappings that are set up in the system. *This will be T36T37 for sales documents and T38T39 for purchase documents.*

6. End Table Filter (Optional)

Specifies the filter that should be applied on the record set of the end table.
E.g. when using Item attributes to filter the lines that will trigger the promotion, the filter can be set up as follows:

- a. **Attribute Name:** Type
- b. **Value:** X

5. 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.

Remark: *the order of the signs used is important, e.g. >= will work, but => will not work.*

*When comparing textual values, the operator **eq** needs to be used to find values that equal the entered information.*

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.

6. End Table Filter (Optional)

Specifies the filter that should be applied on the record set of the end table.

E.g. when using Item attributes to filter the lines that will trigger the promotion, the filter can be set up as follows:

a. Attribute Name: Type

b. Value: X

6. 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.

Remark: *the order of the signs used is important, e.g. >= will work, but => will not work.*

*When comparing textual values, the operator **eq** needs to be used to find values that equal the entered information.*

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.

5.5.3 Results

Specify the results that need to be applied on the document when the promotion is applied.

1. Type

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

Depending on the selected type, different fields need to be filled in.

5.5.3.1 Modify Header

Modifies a value on the header of the document.

E.g. change the field Payment discount and insert 5%.

When this type is selected, following fields need to be filled in.

1. Description

A description of the result. This description is purely informational.

2. Condition Line No.

Specifies the condition line that should be met for this result to be applied on the document.

3. End Source Table

The table on which the result will be applied.

This will be 38 (sales header) or 36 (purchase header).

4. End Source Table Name

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

5. End Table Field No.

The field of the end table in which the result will be applied.

E.g. select 25 to edit the Payment Discount % on the header of the document; use 22 to add a value to the unit price field of a newly added line using Apply Discount method, etc.

6. End Table Field Caption

The caption of the selected field will be displayed.

7. Use Validation (optional)

Specifies if the value in the selected end table field needs to be validated.

8. 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.

5.5.3.2 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.

When this type is selected, following fields need to be filled in.

1. Description

A description of the result. This description is purely informational.

2. End Source Table

The table on which the result will be applied.

E.g. if the result needs to be applied on the lines of the document, this needs to be set to 37 for sales lines, or 39 for purchase line.

3. End Source Table Name

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

4. End Table Field No.

The field of the end table on which the result will be applied.

E.g. to add a discount on the sales/purchase lines, this needs to be set to 27, Line Discount %; to add a discount amount, use field 28.

5. End Table Field Caption

The caption of the selected field will be displayed.

6. Use Validation (Optional)

Specifies if the value in the selected end table field needs to be validated.

7. 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.

E.g. to give 15% line discount, add 15 in this field.

8. 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.

This is important if there are more than one conditions for the promotion.

5.5.3.3 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%.

When this type is selected, following fields need to be filled in.

1. Description

A description of the result. This description is purely informational.

2. End Source Table

The table on which the result will be applied.

E.g. if the result needs to be applied on the lines of the document, this needs to be set to 37 for sales lines, or 39 for purchase line.

3. End Source Table Name

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

4. Use Validation (Optional)

Specifies if the value in the selected end table field needs to be validated.

5. Create Line Code

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

In this **Create line Header**, the **Processing Order** is important to make sure the fields are validated in the right order and no information is overwritten by Business Central. The functions **Move Up** and **Move Down** can be used to influence this processing order.

E.g. to create a line on the purchase document with a charge(item) with following details.

Create Line Header

✓ Saved

S-001

General

Show more

Code

S-001

Source Table

37

Description

N of item A + 1 free

Source Table Name

Sales Line

Fields

New Line
 Delete Line
 Move Up
 Move Down

	Field No.	Field Caption	New Value	Use Valid...	Processing Order ↑
	5	Type	Charge (Item)	✓	1
	6	No.	ITEM001	✓	2
	11	Description	discount item	✓	3
→	5407	Unit of Measure Code	PCS	✓	4
	15	Quantity	1	✓	5

6. Modify Condition Line No.

Specifies the line to which this result line is linked. This will determine when this line will be created (when the linked condition line is valid and triggered the promotion). This is important if there are more than one conditions for the promotion.

7. Calculation Type

The calculation type of the action. This controls the amount of times an action can be executed.

The options are:

a. Fixed

The action can only be performed once in the same document.

b. Multiple

The action can be performed multiple times, each time the condition is met.

8. 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.

5.5.3.4 Apply Item Charge

Creates a new line with type Charge Item and distributes the line to the linked lines from the condition. This needs to be used to add a line with a fixed Unit Price to the lines of the document.

E.g. Add a line for shipping cost when the weight of the items is more than 10 kg.

When this type is selected, following fields need to be filled in.

1. Description

A description of the result. This description is purely informational.

2. Create Line Code

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

E.g. to create a line on the sales document with following details.

Create Line Header

TESTQTYVALUE-S-012

General Show more

Code TESTQTYVALUE-S-012 Source Table 37 ▾

Description Buy item from cat A get dis Source Table Na... Sales Line

Fields | New Line | Delete Line

	Field No. ↑	Field Caption	New Value	Use Vali...
	5	Type	Charge (Item)	☒
	6	No.	SHIPPING	☒
	11	Description	Shipping costs	☒
	15	Quantity	1	☒
→	22	Unit Price	15	☒

3. 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.

This is important if there are more than one conditions for the promotion.

4. Item Charge Method

Specifies the method of distributing the Item Charge if used.

The options are:

- a. Equally,
- b. By Amount,
- c. By Weight, and
- d. By Volume.
- e. By original Quantity (*Cannot be selected for this type*).

5.5.3.5 Modify Lines

Modifies the lines based on the defined relation and filter. The lines that meet the filter set on the result line are modified.

If no filter is set, all lines on the document will be discounted.

E.g. Modify all lines with a quantity ≥ 15 and set the Discount percentage to 5%.

When this type is selected, following fields need to be filled in.

1. Description

A description of the result. This description is purely informational.

2. End Source Table

The table on which the result will be applied.

E.g. if the result needs to be applied on the lines of the document, this needs to be set to 37 for sales lines, or 39 for purchase line.

3. End Source Table Name

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

4. End Table Field No.

The field of the end table on which the result will be applied.

E.g. to add a discount on the sales/purchase lines, this needs to be set to 27, Line Discount %. If a Discount Amount needs to be added, use field 28.

5. End Table Field Caption

The caption of the selected field will be displayed.

6. Use Validation

Specifies if the value in the selected end table field needs to be validated.

7. 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.

E.g. to give 15% discount on the lines, add 15 in this field.

8. Line Filter (Optional)

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

E.g. when the Reusable Packaging app is installed on the environment, the filter can be set as following to exclude the reusable packaging lines when applying a discount.

VERSION(1) SORTING(Document Type, Document No., Line No.) WHERE(Item Type=FILTER(<>Reusable Packaging)).

9. Relation Route

Defines the relation route to the end table.

E.g. T36T37 to add data on the sales lines of the document.

5.5.3.6 Apply Discount

Creates a discount charge line and distributes this charge over all lines based on the linked condition line.

This type can be used to add a line to the document, that has a Unit Price that is calculated using information on the document lines.

E.g. If a certain item is added to the document, add a line with negative value and distribute to this line.

When this type is selected, following fields need to be filled in.

1. Description

A description of the result. This description is purely informational.

2. End Source Table

The table on which the result will be applied.

E.g. if the result needs to be applied on the lines of the document, this needs to be set to 37 for sales lines, or 39 for purchase line.

3. End Source Table Name

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

4. Create Line Code

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

E.g. following create line header code can be used to add a line to the document with following details.

Create Line Header

TESTQTYVALUE-S-012

General Show more

Code TESTQTYVALUE-S-012

Source Table 37 ▾

Description Buy item from cat A get dis

Source Table Na... Sales Line

Fields New Line Delete Line

Field No. ↑	Field Caption	New Value	Use Vali...
5	Type	Charge (Item)	☒
6	No.	DISCOUNT	☒
11	Description	discount	☒
15	Quantity	1	☒

5. 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.

This is important if there are more than one conditions for the promotion.

6. Calculation Type

The calculation type of the action. This controls the amount of times an action can be

executed.

The options are:

a. Fixed

The action can only be performed once in the same document.

b. Multiple

The action can be performed multiple times, each time the condition is met.

7. Item Charge Method

Specifies the method of distributing the Item Charge if used.

The options are:

a. Equally,

b. By Amount,

c. By Weight,

d. By Volume, and

e. By original Quantity

- i. This method can be used to assign a monetary value to the lines, based on the quantity that is included in the promotion. For that line.

ii. E.G.

Sales Lines

1 x 50 €

3 x 75 €

2 x 100 €

Promotion

10 % discount on cheapest 2 items

**Based on sales line 1 (1x 10% on 50 €) and 2 (1x 10% on 75 €) =
12.5 €**

Item Charge Assignment

Line 1 : "Original Qty To Assign" = 1

Line 2 : "Original Qty To Assign" = 1, since only 1 of the 3 items is included in the promotion.

Line 3 : "Original Qty To Assign" = 0, since none of the items are included in the promotion.

Line 1 must receive 5 € from the total 12.5 €

Line 2 must receive 7.5 € from the total 12.5 €

8. End Table Sort Field No./Caption

Specifies the field that should be used to calculate the discount 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.

This can also be used when Dynavision Excise Duties is installed, to calculate the discount on the net price, in this case, the field 71096980 can be set.

9. End Table Quantity Field No./Caption

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

10. 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.

11. Discount Quantity

Specifies the quantity that will be discounted when/each time the promotion applies. If the option **Apply Discount** is used, the logic of the discount quantity is as follows:

- a. If a **number is specified**, the promotion will be applied to the first N items of the promotion lines (sorted by the End table sort field No.).
- b. If the quantity is set to **0**, the promotion will be applied to all item lines.

12. 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.**

13. 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.

5.5.3.7 Enable the Promotion

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

5.5.3.8 Usage factbox

The usage factbox on the card displays the number of document lines and documents where the promotion has been applied.

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 found by clicking following [link](#).

5.6.1 Promotion Condition examples

5.6.1.1 Case 1

In this case following promotion is set up: **Buy 2 CRATES of Apples, receive one CRATE of Apples for free.**

The general fields on the promotion page are filled in first.

5.6.1.1.1 General fields

Code	2+1	Use AND Operation ...	☐
Description	N of item A + 1 free fixed	Valid From	1/12/2022
Source Table	36	Valid To	31/12/2022
Source Table Name	Sales Header	Instant Promotion	☐
Record Filter	...	Enabled	☒

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.

5.6.1.1.2 Promotional Conditions

The **filters** that will need to be defined are:

- **The item of promotion:** Apple;
- **The item Unit of Measure:** CRATE;
- **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:

Conditions							
New Line Delete Line							
Type	Description	End Source Table	End Source Table Name	Relation Route	Line Relation Route	End Table Filter	Formula
→ Line Summa...	Buy N of item A	37	Sales Line	T36T37	T36T37	VERSION(1) SORTING(Doc...	F%15 >= 2 and F%5407 eq CRATE

1. Type

As type, **Line** Summation is chosen.

The reason that this type is chosen is because the system will need to run across several lines on the sales order to determine if two CRATES of Apples 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 CRATE of Apples on the sales document. With this type, the two CRATES would have to 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.

Select - Table Mappings							
Analyze New Edit List							
Code ↑	From Table No.	From Table Caption	To Table No.	To Table Caption			
→ T36T37	36	Sales Header	37	Sales Line			

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

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 Apple 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(Apple)).

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 CRATE

- 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.

5.6.1.1.3 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 CRATE of Apple.

1. Type

A new line will need to be added to the document with the free CRATE of Apple 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.

Create Line Header

PROM00018-001|M

General Show more

Code PROM00018-001|M Source Table 37

Description A N+M Multiple Source Table Name Sales Line

Fields New Line Delete Line

	Field No. ↑	Field Caption	New Value	Use Validation
→	5	Type	Charge (Item)	☒
	6	No.	KORTING	☒
	11	Description	PROMO	☒
	15	Quantity	1	☒

5.6.1.2 Case 2

In this case following promotion is set up: **Buy 2 PCS of fruit, get 1 PCS for free.**

5.6.1.2.1 General fields

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

5.6.1.2.2 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** FRUIT, filters need to be set.

- **Item Price Group:** FRUIT;
- **Item Unit of Measure:** PCS;
- **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.

Steps New Line Delete Line									
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(FRUIT)).

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 $f\%15 \geq 2$.

5.6.1.2.3 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.

5.6.2 Promotional Results examples

The examples below focus on the various promotional results.

5.6.2.1 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%.**

5.6.2.1.1 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

5.6.2.1.2 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		

5.6.2.2 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.

5.6.2.2.1 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

5.6.2.2.2 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.

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	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	

5.6.2.3 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 PCS of pears, they get a free apple.

5.6.2.3.1 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.

Conditions New Line Delete Line							
Type	Description	End Source Table	End Source Table Name	Relation Route	Line Relation Route	End Table Filter	Formula
→ Line Summa...	Buy at least 2 pears	37	Sales Line	T36T37	T36T37	VERSION(1) SORTING(Doc...	F%15 >= 2 and F%5407 eq PCS

The end table filter is set to item Pear.

VERSION(1) SORTING(Document Type,Document No.,Line No.)
WHERE(Type=FILTER(Item),No.=FILTER(Pear))

5.6.2.3.2 Promotional Results

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

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	Create Line Code	Modify Condition Line No.	Calculation Type	
→ 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 Apple, 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%.

Create Line Header

TESTDOCUMENT-S-010

General Show more

Code TESTDOCUMENT-S-010 Source Table 37 ▾

Description Buy N item A and get M free Source Table Name Sales Line

Fields New Line Delete Line

Field No. ↑	Field Caption	New Value	Use Validati...
5	Type	Item	☒
6	No.	Apple	☒
11	Description	1 FREE APPLE	☒
15	Quantity	1	☒
27	Line Discount %	100	☒

5.6.2.4 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.

5.6.2.4.1 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.

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

5.6.2.4.2 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.

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 Lines	Set a line discount of 5%	37	Sales Line	27	Line Discount %	☒	5

5.6.2.5 Apply discount – get discount on second item

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 Apples, they get a discount of 40% on the second crate.

5.6.2.5.1 Promotional Conditions

The condition for this promotion to apply is that the document contains at least 2 creates of apples.

Conditions								
New Line Delete Line								
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 Apple.

*VERSION(1) SORTING(Document Type,Document No.,Line No.)
WHERE(Type=FILTER(Item),No.=FILTER(Apple))*

5.6.2.5.2 Promotional Results

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

Results											
New Line Delete Line											
Type	Description	End Source Table	End Source Table Name	End Table Field No.	End Table Field Caption	Use Valid...	New Value	Create Line Code	Modify Condition Line No.	Calculation Type	
→ Apply Disc...	get discount on 2nd item	37	Sales Line	Q		☐		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**.

Create Line Header

PROM00139-S-012

✓ Saved

General

Code

PROM00139-S-012

Source Table Name

Purchase Line

Description

Buy item from cat A get discount

Used in Promotion Re...

2

Source Table

39

Fields

[New Line](#) [Delete Line](#)

Field No. ↑	Field Caption	New Value	Use Validat...
→ 5	Type	Charge (Item)	☒
6	No.	DISCOUNT	☒
11	Description	Korting	☒
15	Quantity	1	☒

5.6.2.6 Apply Discount – Dynavision Excise duties – calculate discount on Net price

This result create a new line in the document if the conditions of the promotion are met and calculates a unit price using the **Net Price** of the condition line and a specified percentage. In this example, when a customer buys 2 units of an item with category code BEER, they get a discount of 50% on the net price of the BEER items.

5.6.2.6.1 Promotional Conditions

The condition for this promotion to apply is that the document contains at least 2 units of beer.

Conditions									
New Line Delete Line									
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 as follows:

VERSION(1) SORTING(Document Type,Document No.,Line No.)

WHERE(Type=FILTER(Item),Item Category Code=FILTER(BEER),Item Type=FILTER(Normal))

5.6.2.6.2 Promotional Results

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

Results														
New Line Delete Line														
Type	Description	Condition Line No.	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	Item Charge Method	Line	
→ Apply Disc...	excise discount		37	Sales Line	22	Unit Price	☐		TEST CHEAPE...	10000	Fixed	Equally		

End Table Sort Field No.	End Table Sort Field Caption	End Table Quantity Field No.	End Table Quantity Field Caption	Sort Type	Discount Quantity	Discount Percentage	Quantity Condition Line No.
71096980	Net Price excl. Discount	15	Quantity	Ascending	1	50	

The creation if this line is done using a **Create Line Code**. The create line code is set up just like the previous example.

Discount will be calculated using the **Net Price Excl. Discount** field of the conditional line.

The discount applied will be 50%, as noted in the **Discount Percentage** field.

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 View and create promotions from certain pages

It is possible to view the promotions or create them by using the action that is added for following entities: Customers, Vendors, Items and Campaigns.

On the list page or the card of the entity, choose the action **Promotions** to open the list of promotions and create new promotions if desired.

8 Copy Promotions

Promotions that have been created can be copied. This will copy the general information and the conditions. The results will be emptied and will need to be set up for the created copy.

1. Navigate to the **Promotions** list page.
2. Select the promotion in the promotions list that needs to be copied.
3. Choose the action **Copy Promotion**, which can be found under the action **New**.

9 Disable selection of promotions

It is possible to disable a selection of promotions.

1. Navigate to the **Promotions** list page.
2. Select the promotions that need to be disabled.
3. Choose the action **Disable**.

10 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**.

11 Promotions in combination with TRIMIT

11.1 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.

11.2 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 to the 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.*

11.3 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:

The screenshot shows the 'Promotion Card' configuration interface for a promotion named 'WINES 2+1 free'. The interface includes a top navigation bar with 'Home', 'Promotion', 'Automate', and 'Fewer options'. Below the navigation bar are buttons for 'Copy Promotion', 'Select items...', and 'Test...'. The main configuration area is divided into three sections: 'General', 'Conditions', and 'Free Same Item'.

General Section:

- Description: WINES 2+1 free
- Type: Free Same Item
- Sales Type: All Customers
- Sales Code: (empty)
- Valid From: 24/07/2023
- Valid To: 7/08/2023
- Enabled: ☒

Conditions Section:

- Minimum Quantity: 3
- Unit of Measure Code: FLES
- Type: Promotion Group
- No.: WINES
- Description: Wines

Free Same Item Section:

- No.: KORTING
- Description: Korting
- Unit of Measure Code: (empty)
- Quantifier: Once
- Quantity: 1

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.

Sales Order

VOR-23/00331 · TEST

Notifications: 2 This customer has an overdue balance. | Start validating data in documents and journals while you work. Messages are shown in the Document Check FactBox.

Home Prepare Print/Send Request Approval Order Actions Related Automate Fewer options

Check for Promotions Release Create Warehouse Shipment Archive Document Scan Reusable Packaging Ticket

Post... Create back order Create Inventory Put-away/Pick... Get Data From Companyweb Choose Reusable Packaging Ticket

Lines Manage Line Order

New Line Delete Line Toggle reusable packaging Select items...

Type	No.	Item Reference No.	Description	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %	Invoicing Quantity	Invoicing Unit of Measure Code	Qty. to Ship
Item		ART00075	Principe de viana Crianza	HOOFD	3	FLES	15,00		3	FLES	
Charge (Item)		KORTING	Korting	HOOFD	1		-15,00		1		

Subtotal Excl. VAT (EUR) 30,00 Total Excl. VAT (EUR) 30,00

Inv. Discount Amount Excl. VAT (EUR) 0,00 Total VAT (EUR) 6,30

Invoice Discount % 0 Total Incl. VAT (EUR) 36,30

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

12 Promotions in combination with external systems

It is possible to use the functionalities of the Promotions app when external systems are used. How this can be achieved is noted in the following [support document](#). The information is noted in the section Price Calculation functions and webshops.