

AP Commerce Inc.

# Advanced Sales Promotion

## Table of Contents

Installation & Setup.....	2
Setup the Advanced Sales Promotion App .....	2
Modify the Advanced Sales Promotion Setup .....	6
Setup the Advanced Sales Promotion Subscription.....	6
General.....	7
Subscription Info .....	7
Subscription .....	7
Subscription Status .....	7
Create subscription by credit card payment.....	8
Create subscription manually .....	122
Cancel the subscription if using card payment.....	14
User Scenarios for Promotions .....	17
Create a Promotion .....	17
Promotion Scenario: Buy 2 items and get 1 free .....	19
Setup Promotion Basic Information.....	19
Setup Promotion Condition .....	20
Setup Promotion Result .....	21
Apply Promotion for Orders.....	22
User Note .....	25
Other Promotion Scenario Examples.....	25
Buy 8 of item A and get 1 of Item B with a % discount.....	25
Buy 10 of item A and get free freight.....	27
Buy \$1,800 of item 1 ... to item n and get gifts.....	288

# Installation & Setup

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

## Setup the Advanced Sales Promotion App

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

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

Freda Cheng

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

---

**web service Access**

---

[Office 365 Authentication](#) >

---

**User Groups** | [Manage](#)

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

---

**User Permission Sets** | [Manage](#)

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

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

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

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

7. This will launch the wizard for this process

**ADVANCED SALES PROMOTION SETUP WIZARD** ↗ ✕

**CUSTOMER DETAILS**

Provide your company details

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

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

9. Check and modify customer information as needed.

10. Click **Next**

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

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

ADVANCED SALES PROMOTION SETUP WIZARD



### NUMBER SERIES

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

Promotion Nos. ....

Back

Next

Finish

12. Click **Next**

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

**ALL DONE**

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

Back

Next

Finish

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



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

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

OK

Cancel

## Modify the Advanced Sales Promotion Setup

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

TELL ME WHAT YOU WANT TO DO  

Go to Pages and Tasks

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

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

  +  ✓ SAVED 

### Advanced Sales Promotion Setup

---

Number Series

Promotion Nos. .... S-PROMO 

## Setup the Advanced Sales Promotion Subscription

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

TELL ME WHAT YOU WANT TO DO



promotion setup

Go to Pages and Tasks

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

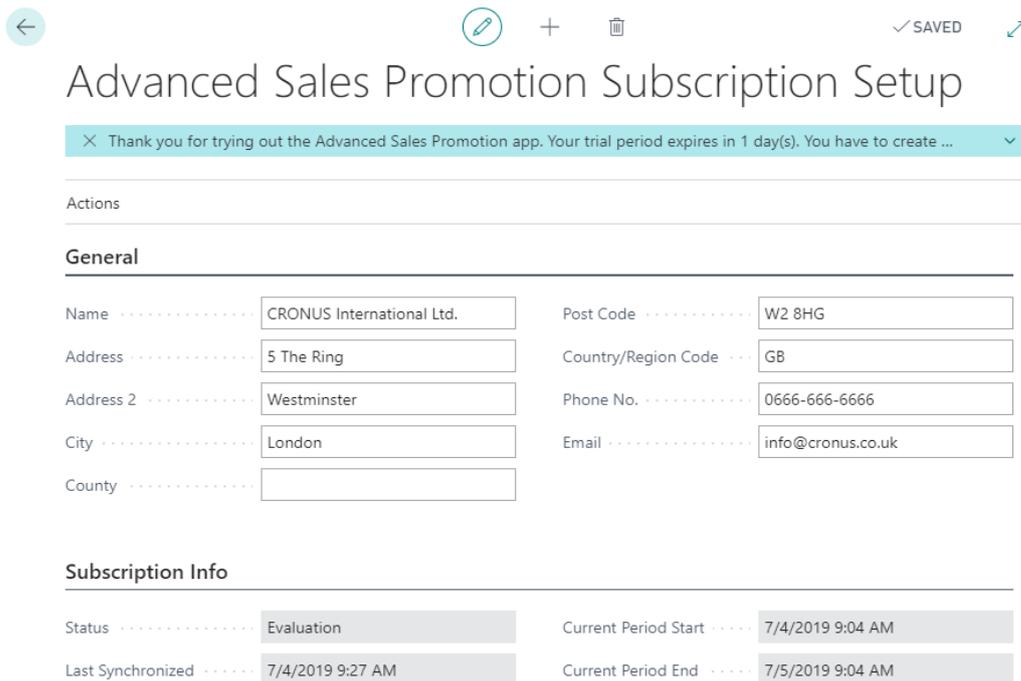
2. On **Advanced Sales Promotion Subscription Setup** page, it contains two fast tabs:

### General

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

### Subscription Info

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



← [edit] + [trash] ✓ SAVED [share]

## Advanced Sales Promotion Subscription Setup

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

Actions

### General

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

### Subscription Info

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

## Subscription

### Subscription Status

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

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

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

## Create subscription by credit card payment

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

←  +  ✓ SAVED 

## Advanced Sales Promotion Subscription Setup

Actions

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

**Subscription Info**

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

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

CREATE SUBSCRIPTION TO ADVANCED SALES PROMOTION  



**CUSTOMER DETAILS**  
Provide your company details

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

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

then click **Next**.

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

CREATE SUBSCRIPTION TO ADVANCED SALES PROMOTION



#### CREDIT CARD DETAILS

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

 Card number

MM / YY CVC

Back

Next

Finish

6. Click **Next**.

CREATE SUBSCRIPTION TO ADVANCED SALES PROMOTION

**CREDIT CARD DETAILS**

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

VISA 4242 4242 4242 4242

12 / 25 666

Back

Next

Finish

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

CREATE SUBSCRIPTION TO ADVANCED SALES PROMOTION

**ALL DONE**

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

Back

Next

Finish

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

←
✎ + 🗑
✓ SAVED ↗

## Advanced Sales Promotion Subscription Setup

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

---

Actions

---

### General

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

---

### Subscription Info

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

## Create subscription manually

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



✓ SAVED



## Advanced Sales Promotion Subscription Setup

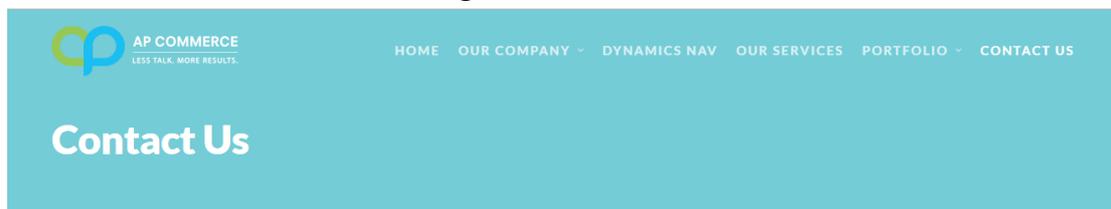
### Actions

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

### Subscription Info

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

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



### Let us know how we can help you!

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

### Give us a call

#### US Office (HQ)

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

 [info@apcommerce.com](mailto:info@apcommerce.com)

#### Asia Office (Taiwan)

 Tel +886-2-2568-1831

 [twinfo@apcommerce.com](mailto:twinfo@apcommerce.com)

## Contact Us

### Let us know how we can help you!

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

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

**SUBMIT**

### Give us a call

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

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

## Cancel the subscription if using card payment

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

←  +  ✓ **SAVED** 

### Advanced Sales Promotion Subscription Setup

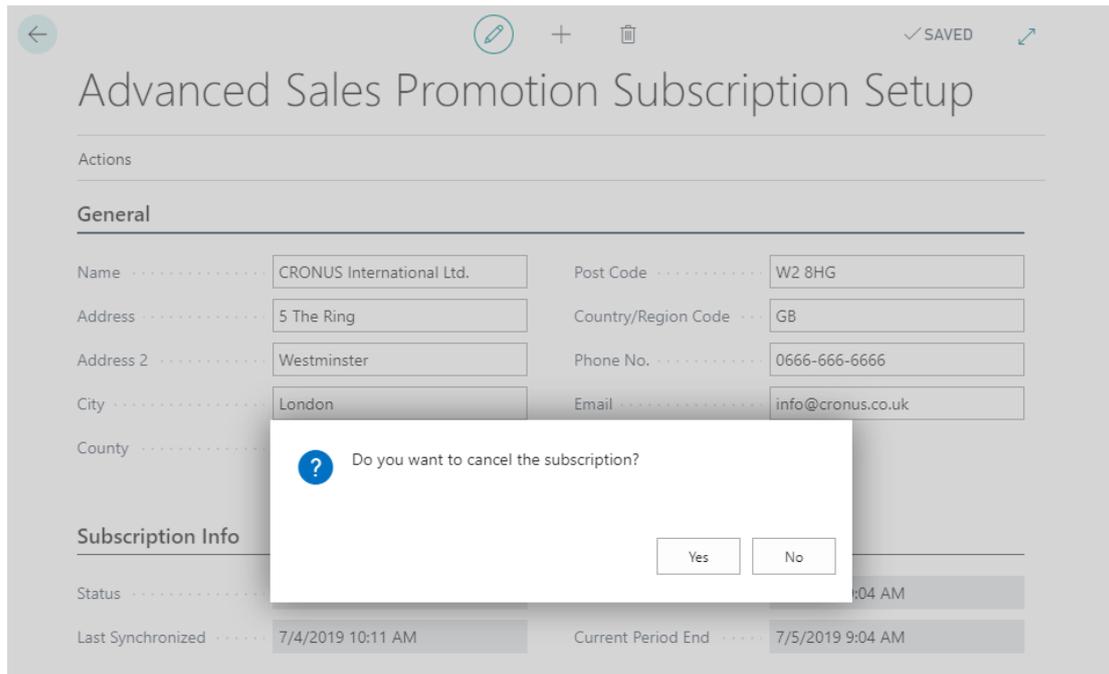
**Actions**

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

**Subscription Info**

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

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



Advanced Sales Promotion Subscription Setup

Actions

**General**

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

**Subscription Info**

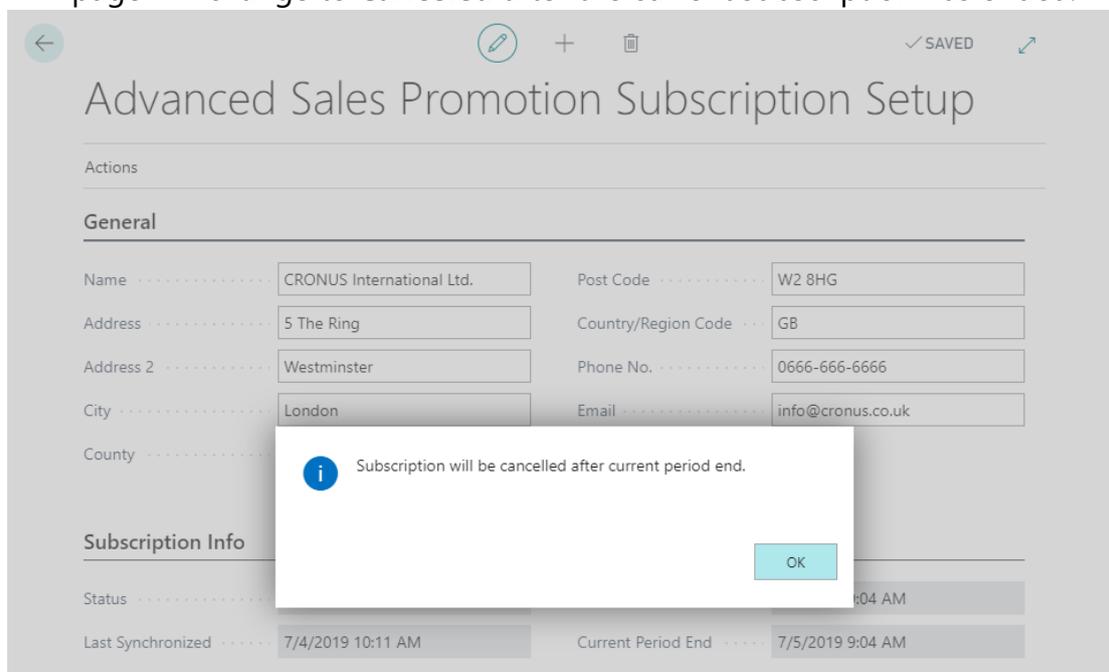
Status

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

Do you want to cancel the subscription?

Yes      No

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



Advanced Sales Promotion Subscription Setup

Actions

**General**

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

**Subscription Info**

Status

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

Subscription will be cancelled after current period end.

OK



✓ SAVED



## Advanced Sales Promotion Subscription Setup

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

Actions

### General

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

### Subscription Info

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

## User Scenarios for Promotions

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

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

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

- Item
- Item category
- Resource

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

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

## Create a Promotion

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

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

TELL ME WHAT YOU WANT TO DO

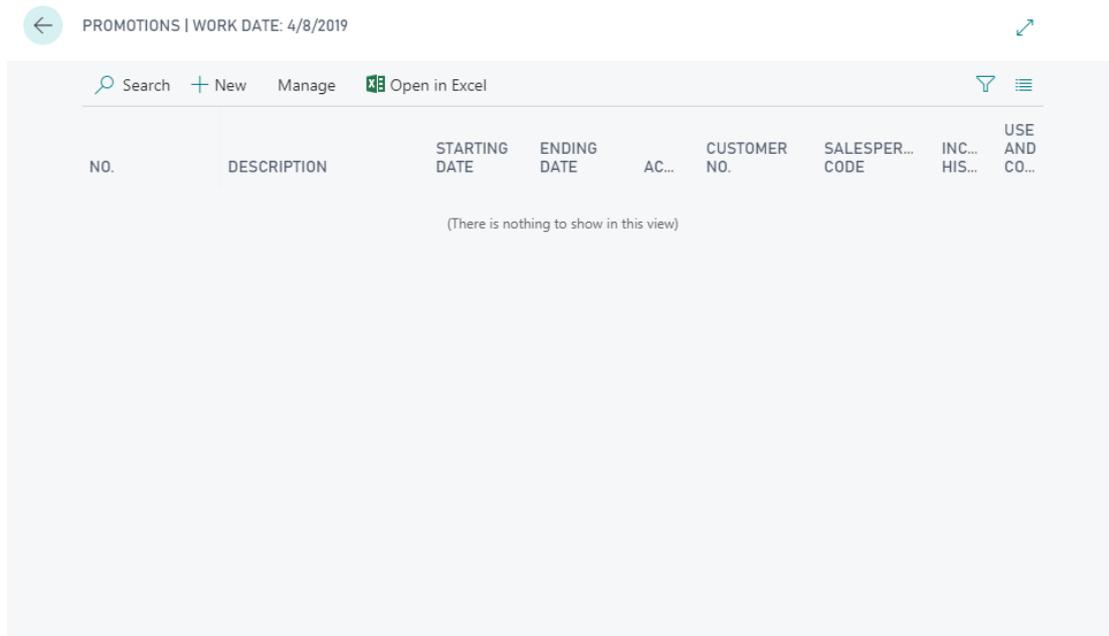


Go to Pages and Tasks

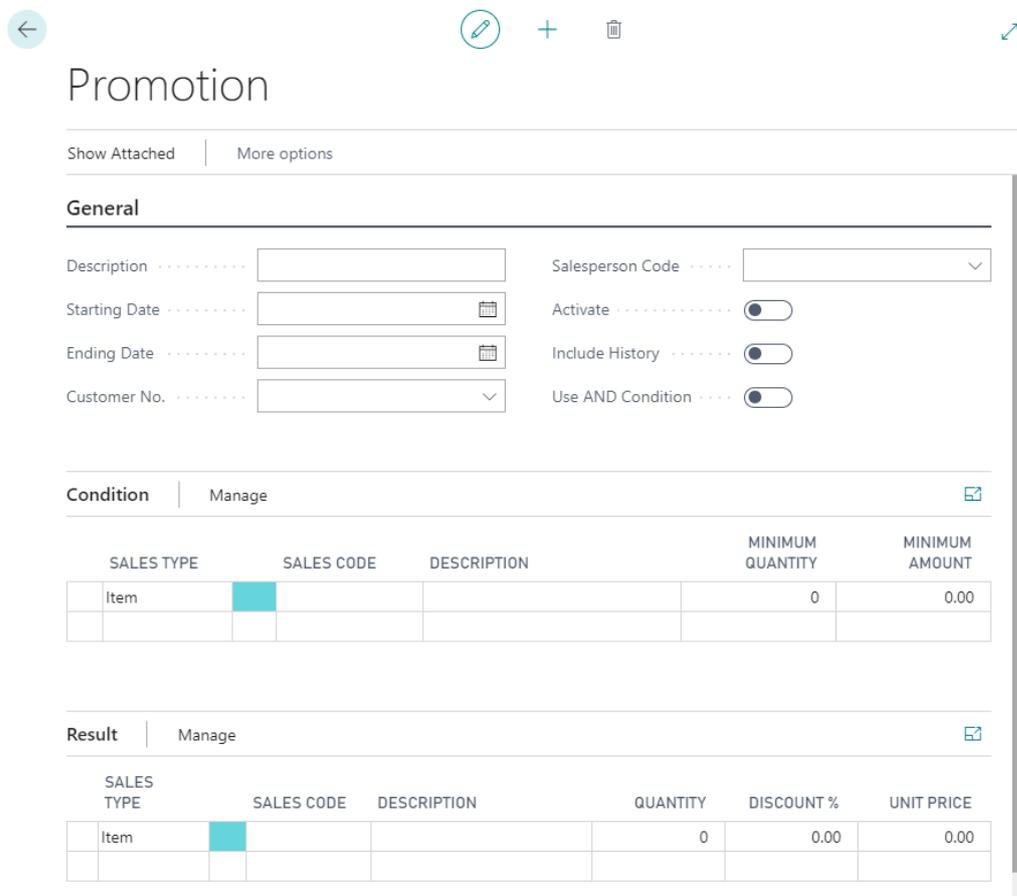
> Promotions

Lists

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



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



## Promotion Scenario: Buy 2 items and get 1 free

### Setup Promotion Basic Information

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

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

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

### PROMO000001

---

**General**

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

---

**Condition** | Manage 🔗

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

---

**Result** | Manage 🔗

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

## Setup Promotion Condition

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

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

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

### PROMO000001

---

**General**

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

---

**Condition** | [Manage](#) 🔗

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

---

**Result** | [Manage](#) 🔗

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

## Setup Promotion Result

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

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

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

### PROMO000001

---

**General**

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

---

**Condition** | [Manage](#)

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

---

**Result** | [Manage](#)

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

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

← PROMOTIONS | WORK DATE: 4/8/2019

Search + New Manage Open in Excel

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

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

## Apply Promotion for Orders

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

← SALES ORDER | WORK DATE: 4/8/2019

101004 · Alpine Ski House

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

Functions Plan Request Approval Warehouse Posting Print Order Confirmation

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

Alpine Ski House Due Date 6/13/2019  
 Ian Deberry Requested Delivery Date 5/14/2019  
 5/13/2019 External Document No.

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

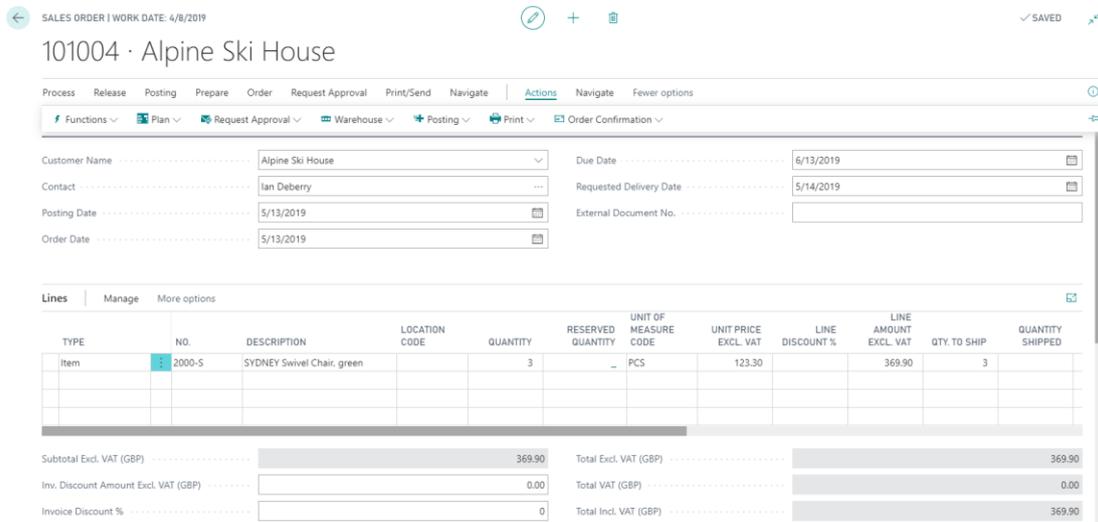
Subtotal Excl. VAT (GBP) 369.90 Total Excl. VAT (GBP) 369.90  
 Inv. Discount Amount Excl. VAT (GBP) 0.00 Total VAT (GBP) 0.00  
 Invoice Discount % 0 Total Incl. VAT (GBP) 369.90

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

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

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

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



SALES ORDER | WORK DATE: 4/8/2019

101004 · Alpine Ski House

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

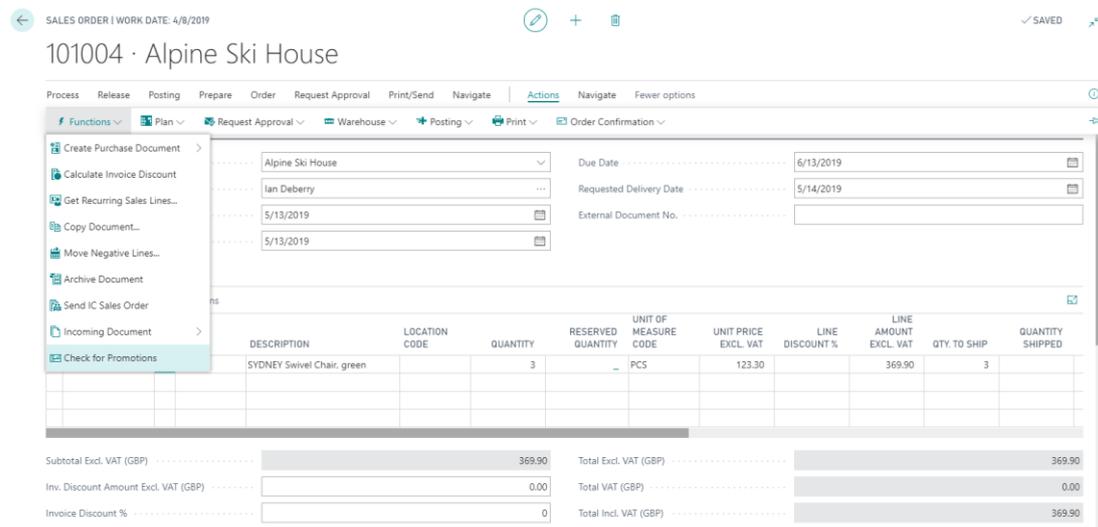
Functions Plan Request Approval Warehouse Posting Print Order Confirmation

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

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

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

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



SALES ORDER | WORK DATE: 4/8/2019

101004 · Alpine Ski House

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

Functions Plan Request Approval Warehouse Posting Print Order Confirmation

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

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

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

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

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

Manage [Confirm Promotion](#) | More options

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

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

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

Delete the promotions you do not wish to apply.

Close

6. Click **Confirm Promotion** button.

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

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

### 101004 · Alpine Ski House

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

---

**General** Show more

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

---

**Lines** | Manage More options

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

---

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

## User Note

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

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

## Other Promotion Scenario Examples

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

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

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

101003 · School of Fine Art

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

---

**General** Show more

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

---

**Lines** | Manage | More options ✕

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

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

2. Promotion Card Setup.

**General**

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

**Condition** | Manage

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

**Result** | Manage

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

**3. Sales Order view after Applying Promotion.**

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

## 101003 · School of Fine Art

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

**General** Show more

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

**Lines** | Manage | More options

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

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

**4. Note:**

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

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

## Buy 10 of item A and get free freight.

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

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

101001 · Adatum Corporation

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

**General** Show more

Customer Name ..... Adatum Corporation Due Date ..... 5/2/2019

Contact ..... Robert Townes Requested Delivery Date ..... 4/3/2019

Posting Date ..... 4/2/2019 External Document No. ....

Order Date ..... 4/2/2019

**Lines** | Manage More options

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

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

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

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

2. Promotion Card Setup.

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

PROMO000003

**General**

Description ..... Buy 10 item A and get free freight Salesperson Code .....

Starting Date ..... 1/1/2019 Activate .....

Ending Date ..... 12/31/2019 Include History .....

Customer No. .... Use AND Condition .....

**Condition** | Manage

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

**Result** | Manage

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

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

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

101001 · Adatum Corporation

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

**General** Show more

Customer Name ..... Adatum Corporation ..... Due Date ..... 5/2/2019

Contact ..... Robert Townes ..... Requested Delivery Date ..... 4/3/2019

Posting Date ..... 4/2/2019 ..... External Document No. ....

Order Date ..... 4/2/2019

---

**Lines** | Manage More options

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

---

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

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

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

### 4. Note:

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

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

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

### 1. Demo Sales Order 101002 before Applying the Promotion.

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

101002 · Adatum Corporation

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

**General** Show more

Customer Name ..... Adatum Corporation ..... Due Date ..... 6/1/2019

Contact ..... Robert Townes ..... Requested Delivery Date ..... 5/2/2019

Posting Date ..... 5/1/2019 ..... External Document No. ....

Order Date ..... 5/1/2019

---

**Lines** | Manage More options

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

---

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

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

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

### 2. Promotion Card Setup.

# PROMO000004

## General

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

## Condition | Manage

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

## Result | Manage

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

### 3. Sales Order After Applying the Promotion.

## 101002 · Adatum Corporation

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

### General

Customer Name .....	Adatum Corporation	Due Date .....	6/1/2019
Contact .....	Robert Townes	Requested Delivery Date .....	5/2/2019
Posting Date .....	5/1/2019	External Document No. ....	<input type="text"/>
Order Date .....	5/1/2019		

### Lines | Manage | More options

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

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