Sales Document Promotions

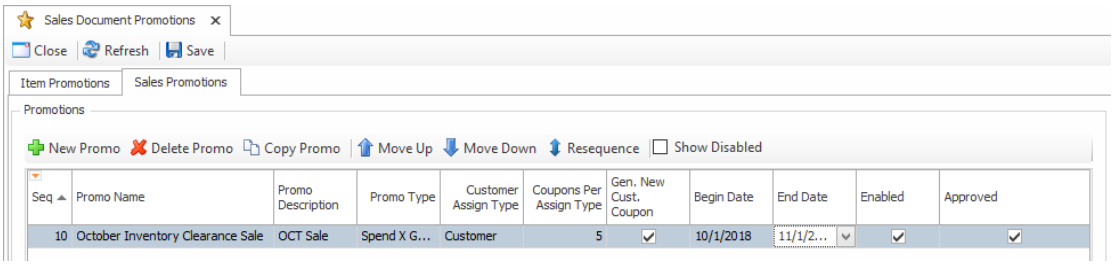
Cavallo Support - 2024-12-03 - Sales

Overview

Sales promotions are used to provide "Spend X, Get Y" discounts for sales documents and to generate coupon codes that can be given out to customers. Item promotions allow users to create and import "Buy X, Get Y Free" and vendor rebate promotions, as well as apply markdowns on either an amount or percentage basis.

Creating a Sales Promotion

To create a new sales promotion, navigate to the Sales Document Promotion module and select the Sales Promotion tab.



From here, click the **New Promo** button in the top left-hand corner. After naming the promotion and giving it a description, choose a Promo Type and Assign Type.

There are four types of promotions supported:

- Spend X Get Y Percent Off – If the document subtotal is greater than or equal to X, then a calculated discount amount is added to the document. This is a dollar amount that will equate to the Y percentage.
- Spend X Get Y Amount Off – If the document subtotal is greater than or equal to X, then a discount amount Y is added to the document.
- Spend X Get Shipping Free – If the document subtotal is greater than or equal to X, then the Freight field will be zeroed out and made Read Only.
- Spend X Get Up To Y Freight Off (Introduced: 4.6.1.14) – If the document subtotal is greater than or equal to X, then the Freight field will be reduced by Y. If freight is less than Y, then the Freight field value will be zero.

The Assigned Type field specifies how coupons will be generated. For example, when choosing Customer as the Assign Type, customers for whom coupons will be generated must be specified at a later point. Each generated coupon will be tied to a specific customer and will be unusable by other customers. The "None" Assign Type has no customer assignment and acts as a pool of coupons that any customer can redeem.

Next, set a value for the Coupons Per Assign Type field. This value is the number of coupons that will be generated per Assign Type. If the Assign Type is Customer and the Coupon Per Assign Type is 5, this will generate 5 coupons per customer. If the Assign Type is None, this value represents the size of the pool of coupons.

The Gen. New Cust Coupon column is only applicable to Customer or Customer Address promo types, and it signifies that if a new customer is created in SalesPad Desktop, they will be added to this promotion and automatically have coupons generated that can be used on any document created for them.

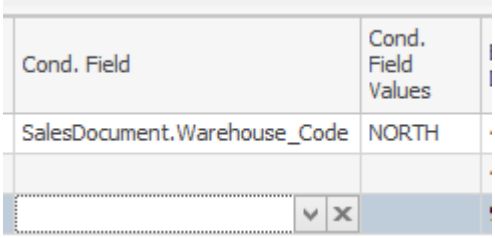
Begin Date and End Date is the duration for which the promotion is valid. Both Enabled and Approved must be checked in order for the promotion coupons to be applied to a sales document.

With SalesPad Desktop version 4.6.1.14 or above, users can define conditional fields for allowing promotions to be applicable.

Example:

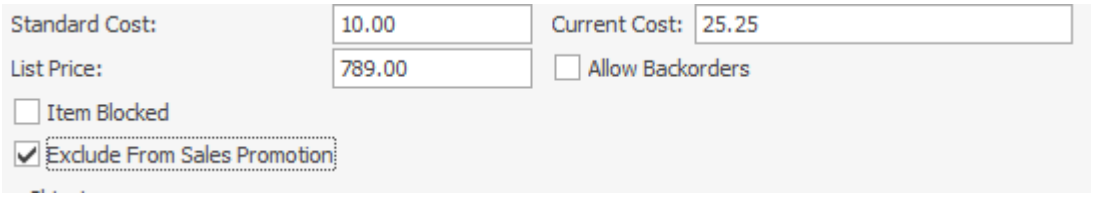
Condition Field = SalesDocument.Warehouse_code
Condition Field Values = NORTH

In this example, the promotion can only be used for sales documents that are in the North Warehouse. Multiple Condition Values can be picked. Conditional Fields can be used for UDFs as well.

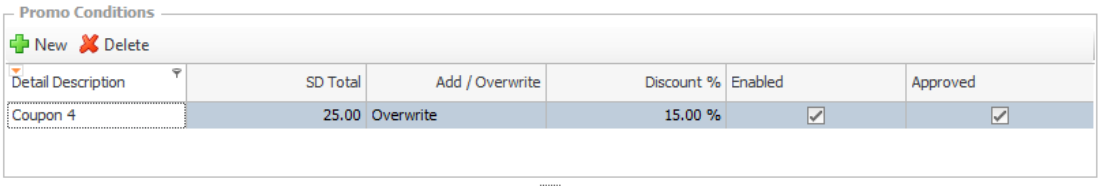


Also as of version 4.6.1.14, promotions can be set to a $0 sales document total, which allows for "up to" amounts off. For example, if using a promotion for $5 off and the customer only spends $2, they will only get a $2 discount unless they spend more. Additionally, promotions that would apply a percentage will now use an equivalent discount amount. This is done because of the potential for Exclude From Sales Promotions items.

Finally, items can be marked as “Exclude From Sales Promotions” on the Item Maintenance screen. These items will not count toward the subtotal used to calculate promotions.



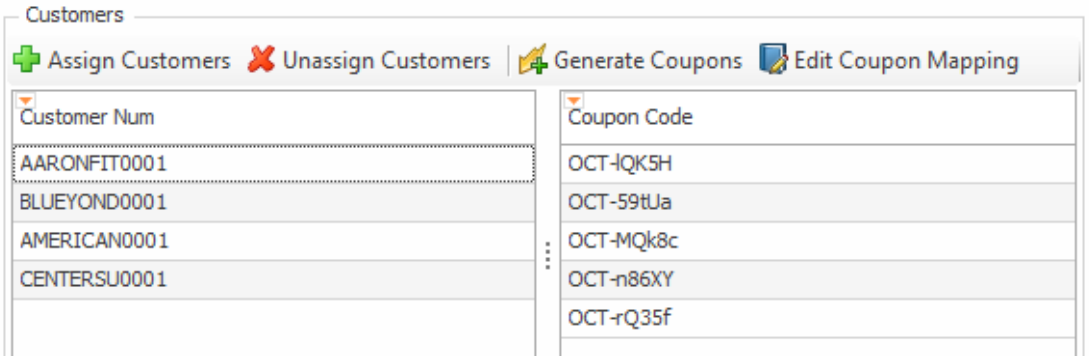
Promotion Details



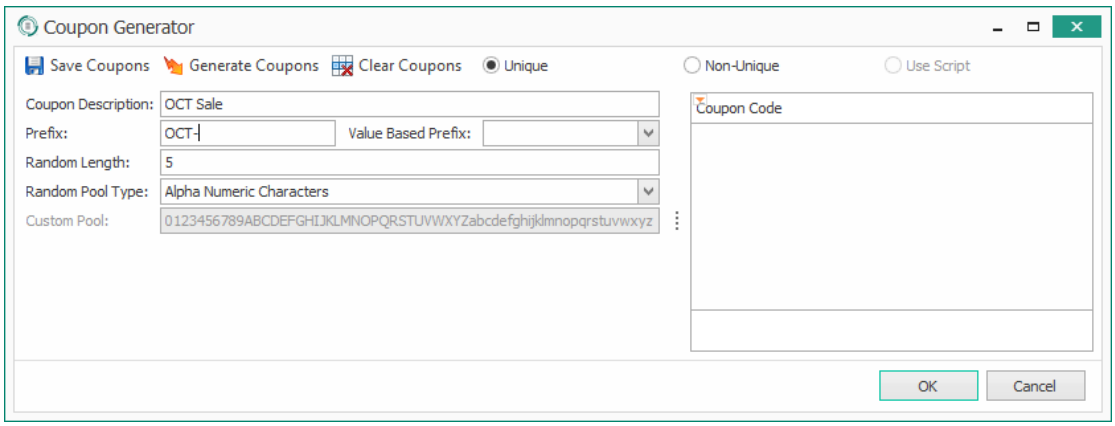
Criteria of the promotion is specified in the Promotion Details grid. In the screenshot above, the document must have a total of $25.00 before the coupon can be applied to a sales document. When it is applied, it will create a 15% discount on the document. The Add / Overwrite column specifies what to do if the sales document already has a value in the Discount/Discount Amount field. The Add option will add the two values together, and Overwrite will apply the promotion value.

Coupon Generation

The Customers window displays which coupons are assigned to each customer or customer address. Coupons that have been applied to a sales document are indicated by strike-through text.



To generate new coupons, click the **Generate Coupons** button near the top left-hand corner. The Coupon Generator window will open.



Coupon code generation can be done in a variety of ways.

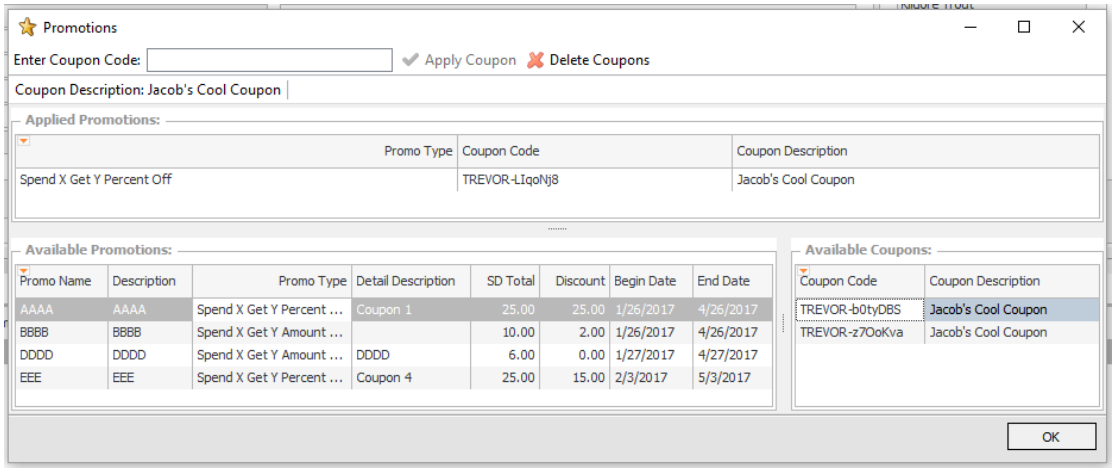
The Prefix is a value that will precede the coupon code. In the example above, “OCT-“ precedes the 5 random alphanumeric values in every code that is generated. If a more dynamic prefix is required, the Value Based Prefix dropdown can be used to choose a field present on the customer/customer address.

Random Length is used to generate unique coupon codes. This will randomly generate the specified length of characters based on the selection in the Random Pool Type field.

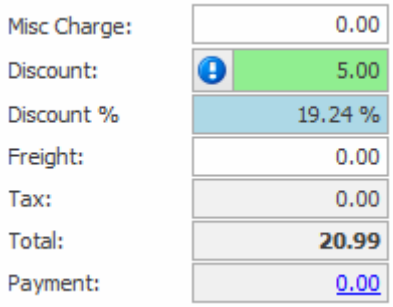
Non-Unique codes can be generated by clicking the **Non-Unique** radio button near the top of the Coupon Generator window. Each coupon generated will have the same code. It is important to note that there will still be a set number of coupons. Once all of the coupons have been redeemed, more codes will need to be generated.

After specifying coupon traits, click on the **Generate Coupons** button. Clicking the OK button before clicking on Generate Coupons will not create coupon codes.

Sales Promotion Coupon Plugin



The Sales Promotion Coupon Plugin is used to apply coupons to sales documents. From a sales document, choose the Sales Promotion Coupon plugin from the Actions menu. Select an Available Promotion in the lower left grid, then double-click a coupon and click **Apply Coupon**. Once finished, click **OK** and save the sales document. Fields that are affected by the coupon will become blue/green to indicate that the change was made



by a coupon.

Item Promotions

Promotion Types

Buy X Get Y Free – Allows offers to be created for any inventory item. Users can define the quantity of both the promotional item and the promotional offer.

- Example 1: Buy 5 of item A, get 1 of item B free.
- Example 2: Buy 5 of item A, get 5 of item A free.

Vendor Rebate – Allows users to include a vendor rebate as a promotional offer. Vendor rebate descriptions will be copied to the sales document line item when applied.

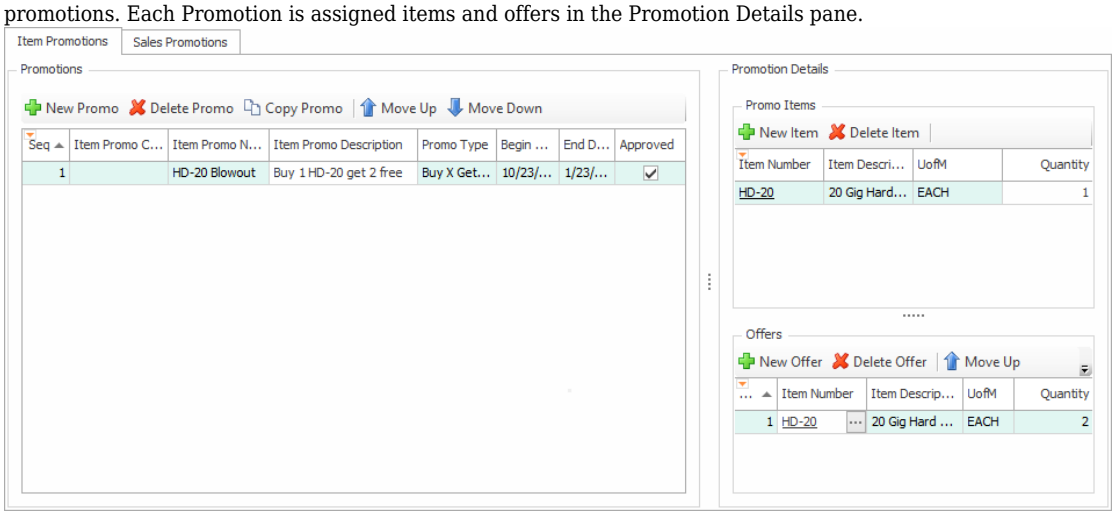
Markdown Percent - Buy a combination of promo items and a markdown percentage will be applied to each of those sales line items.

Markdown Amount - Buy a combination of promo items and a markdown amount will be applied to the first applicable sales line item.

Creating New Item Promotions

Item Promotions are created in the Item Promotions tab of the Sales Document Promotions Module.

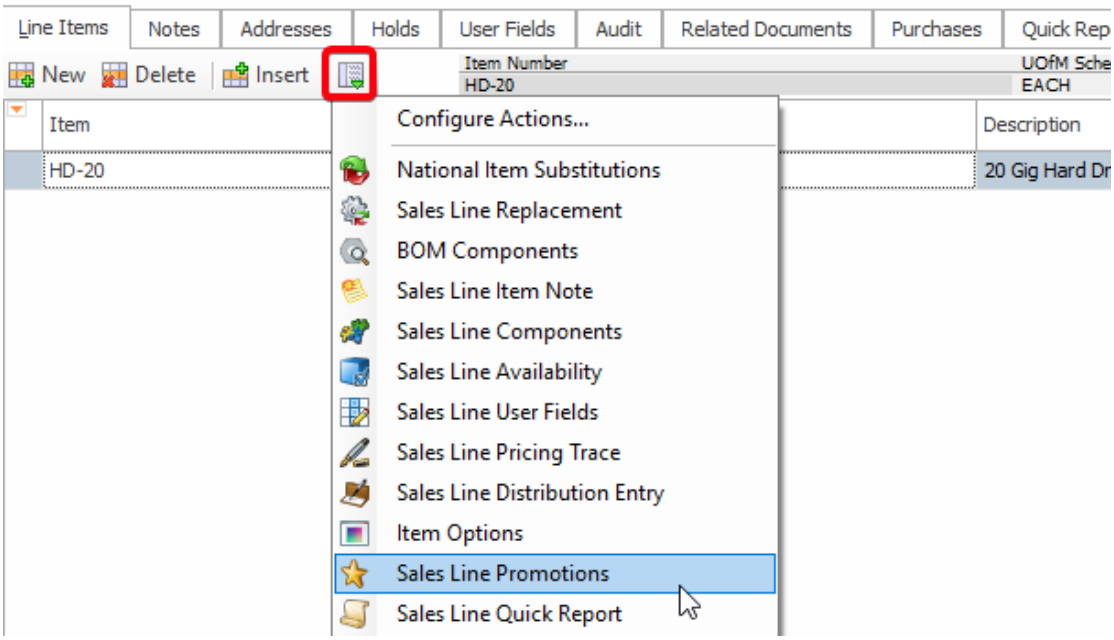
The Item Promotions grid contains the information for that specific promotion, along with the ability to approve promotions. Each Promotion is assigned items and offers in the Promotion Details pane.



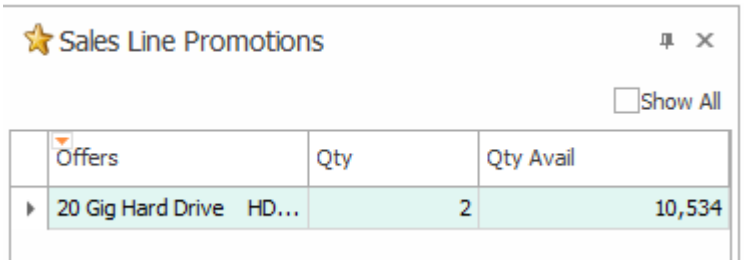
The Promo Items grid is where the item receiving the offer is specified. In the screenshot above, the Promo Item is an HD-20. When purchasing a quantity of 1 HD-20 (specified in the Promo Items grid), customers receive 2 HD-20s for free (specified in the offers grid).

Applying Promotions

After adding an eligible line item to a sales document, click on the Sales Line Promotions plugin from the line items actions list.



When an entering a sales document line item that has a valid promotion, the sales line promotions dock will contain the information for the available promotions.



The dock will display the valid offers, along with the quantity available for that promotional item. If the Show All checkbox is checked, then all promotions for all the sales lines will be visible.

If there is more than one offer for a promotion, the Offers dropdown can be selected to choose between potential offers for that promotion. Select the desired offer, then double-click on the promotion description to apply the promotion to the line item.

After a promotion is applied, a star with a red outline will appear on the sales line. The red star identifies promotional items with an active promotion currently applied to the document. If the applied Promotion Type is Buy X Get Y Free, it will appear with a green star on the sales line. Vendor Rebates will populate the Line Comment field with the vendor rebate description from the promotion offer.



When a Buy X Get Y Free promotion has been applied, certain fields will be disabled. For the free item(s), the following fields are not editable:

- Item Number
- Quantity
- Unit Price
- Unit of Measure
- Markdown Amount
- Mark Down Percent
- Price Level
- Quantity Cancelled

For items that have an associated free promotion item, the following fields are not editable:

- Item Number
- Unit of Measure

When deleting a line item that has an associated free promotion item, the free promotion item will also be deleted. When deleting a free promotion item, all other items associated with that item will lose the association. When copying items to another document, the free promotional items will not be copied and all promotion associations will be removed.

Security

Sales Document Promotions - Grants access to the Sales Document Promotions module.

Sales Line Promotions Dock - Grants access to the Sales Line Promotions plugin on the sales document actions menu.