



Sales and Purchase Promotions for Wholesales

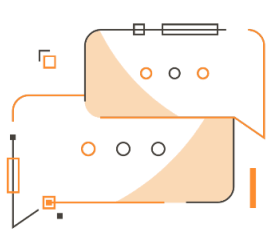
Apply discounts and create promotion plans
in Microsoft Dynamics 365 Business Central



Sales and Purchase Promotions for Wholesales

App for Microsoft Dynamics 365 Business Central

Sales and Purchase Promotions for WholeSales allows the large-scale distribution to manage and apply discounts depending on customer hierarchy levels/groups and to setup promotion plans.



Do you want to define sales price lists for hierarchical levels or other customer/item aggregation modes? Do you want to apply promotion plans and discounts based on the hierarchical structures defined?

How it works

The Sales and Purchase Promotions for Wholesales app allows you to define rules and conditions for creating promotional plans. In detail it allows you to:

- Set up sales price lists for different hierarchy levels or other different customer groups (e.g., clusters)
- Apply discounts and promotions based on hierarchical structures
- Set up promotion plans for customers

Quick Guide

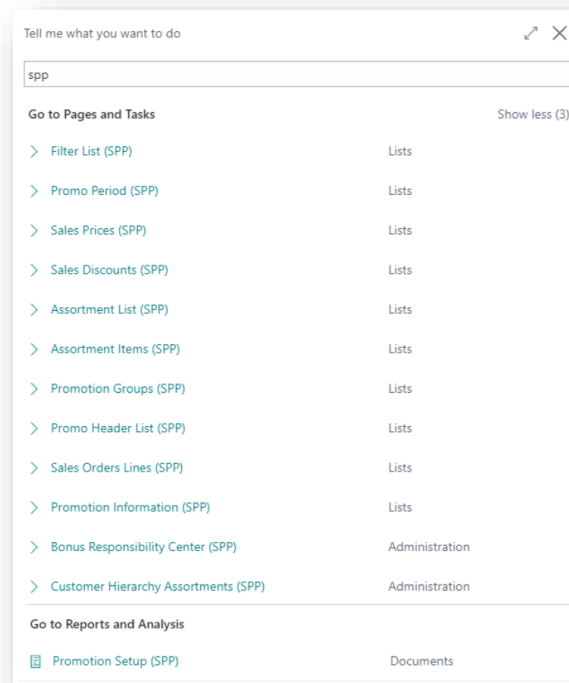
Ready in a few steps:

1. Enter the Promotions **setup**, the discounts' setup and the sales prices' setup
2. Create a **sales order**
3. Let the system **apply the conditions and rules** set before



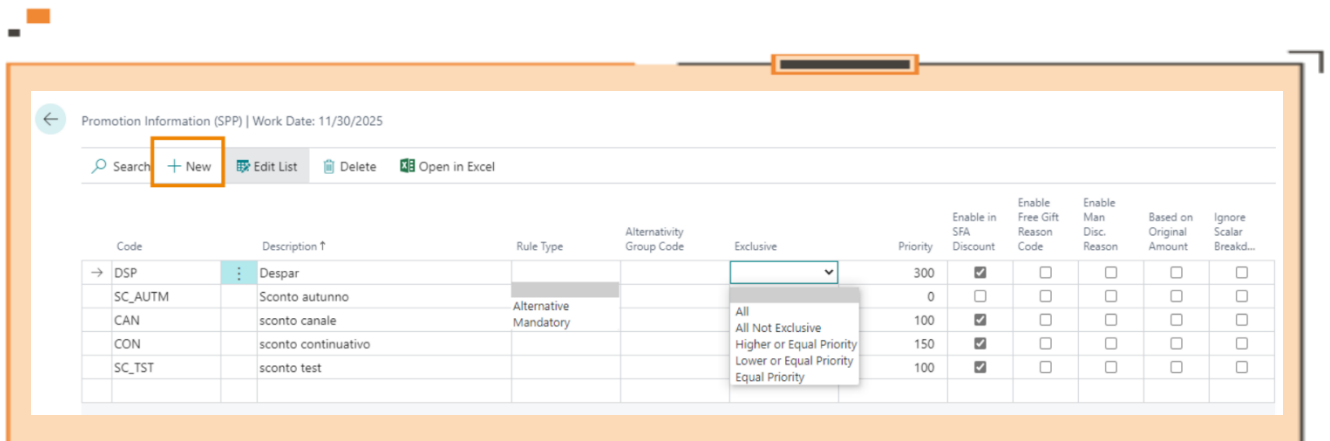
Sales and Purchase Promotions for Wholesales – SUMMARY

Press ALT + Q and digit "SPP" for a list of the features involved:



Promotion Information (SPP)

On the page Promotion Information (SPP) you can **enter new promotion plans** by pressing "New":



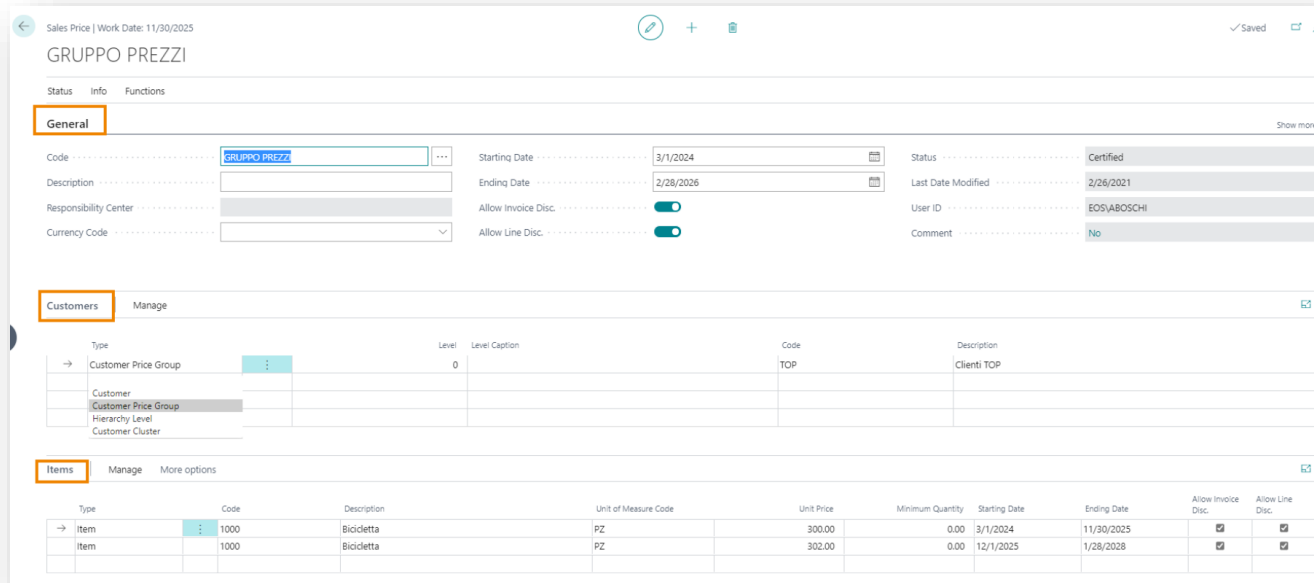
Details:

Field	Description
Code	enter a code for the promotion rule
Description	enter a free description
Rule Type	define when the plan is to apply. The options are: <ul style="list-style-type: none"> Alternative: compared to another promotion Mandatory: always applied
Alternativity Group Code	insert alternativity group code if Alternative is set in the previous field
Exclusive	specify the relationship among promotions defined <ul style="list-style-type: none"> - All: deletes all inserted discounts and set itself only. - All Not Exclusive: deletes all inserted discounts that have a value other than blank in the "Exclusive" field. - Equal Priority: replaces the discount value for all discounts that are linked to a promotion information with the same priority. - Higher or Equal Priority: it substitutes discount value for all discounts linked to a promotion information with the same priority and deletes discounts with higher priority value. - Lower or Equal Priority: it substitutes discount value for all discounts linked to a promotions information with the same priority and deletes discounts with lower priority value.

Setup

Sales Prices (SPP)

On the Sales Prices (SPP) page, after you have defined a price list, you can **define its recipients** (Customer, Customer Cluster, Hierarchy, Customer Price Group) **and items**.



Sales Price | Work Date: 11/30/2025

GRUPPO PREZZI

Status Info Functions

General Show more

Code: GRUPPO PREZZI Starting Date: 3/1/2024 Status: Certified

Description: Ending Date: 2/28/2026 Last Date Modified: 2/26/2021

Responsibility Center: Allow Invoice Disc: Allow Line Disc: User ID: EOS\ABOSCHI

Currency Code: Comment: No

Customers Manage

Type	Level	Level Caption	Code	Description
Customer Price Group	0		TOP	Clienti TOP
Customer				
Customer Price Group				
Hierarchy Level				
Customer Cluster				

Items Manage More options

Type	Code	Description	Unit of Measure Code	Unit Price	Minimum Quantity	Starting Date	Ending Date	Allow Invoice Disc.	Allow Line Disc.
Item	1000	Bicicletta	PZ	300.00	0.00	3/1/2024	11/30/2025	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Item	1000	Bicicletta	PZ	302.00	0.00	12/1/2025	1/28/2028	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



Customers	
Type	identifies the customer grouping type. It is a filter for "Level" and "Code". If you choose Customer , then you can specify the name of the customer in the field Code If you choose Customer Price Group , you can select the specific group from the list in the field Code If you choose Hierarchy Level , then you can specify the Level and the particular Hierarchy Code If you choose Customer Cluster , you can select the specific cluster from the list in the field Code
Level	You can edit this field only if in 'Type' field 'Hierarchy Level' is set. Here you specify the customer hierarchy level on which prices will be applied.
Level Caption	automatically entered according to 'Level' field
Code	Possible selection of prefiltered values according to 'Type' field
Description	entered by the system according to 'Code' field
Items	
Type	identifies the type of item. This field is a filter for the field 'Code' . Options are: - Item - EAN
Code	you can select prefiltered values according to 'Type' field
Description	entered by the system according to the field "Code"
Unit of Measure Code	enter the unit of measure accordind to the "Code" field
Unit Price	Unit price defined for the item inserted
Starting / Ending Date	starting or Ending date of the price set. The date is inherited from the sales header
Allow Invoice Disc.	specifies if a line discount is allowed for this sales price list line

Sales Discounts (SPP)

On the Sales Discount (SPP) list page you **can enter discounts groups and discount conditions.**

Code #	Description	Type	Type of Canal	Responsibility Center	Search Description	Currency Code	Starting Date	Ending Date	Status	Authoriz. Status	Sell-Out Starting Date	Sell-Out Ending Date	Last Date Modified	User ID	Customer Cluster Code	Product Cluster Code
ESCLUSIVO	Sconto esclusivo	Discount			SCONTO ESCLUSIVO		1/1/2025	12/31/2025	Under Dev...				2/26/2021	EOS\ABOSCHI		
SCONTO 1	Sconto 1	Discount			SCONTO 1		1/1/2025	12/31/2025	Under Dev...				2/26/2021	EOS\ABOSCHI		
SCONTOLOG		Discount							New							
SCONTOGPP1	Sconto vendita SPP 1	Discount			SCONTO VENDITA SPP 1		1/1/2025	12/31/2025	Certified				3/1/2021	EOS\ABOSCHI		
SCONTOGPP2	Sconto vendita SPP 2	Discount			SCONTO VENDITA SPP 2		1/1/2025	12/31/2025	Certified				3/1/2021	EOS\ABOSCHI		

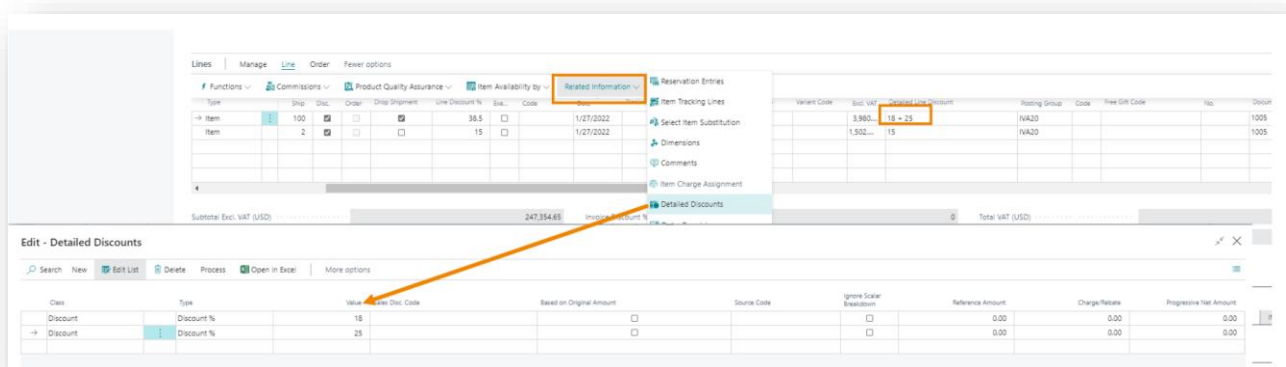


Discount Calculation Example

Sales prices and discounts in sales lines will be implemented according to rules set before.

- Sales price management
- Sales discount management
- Promotion management

Applied conditions are visible in sales line using drill-down function in 'Detailed Discount Line' field (or from Line->Related Information->Detailed Discounts):



Subscription

Some features of the Sales and Purchase Promotions for Wholesales app require a subscription.

The subscription can be activated from Subscription control panel or directly from the notification messages that the system proposes, by clicking on the link that allows you to start the subscription wizard.

Contact us for more info:

www.eos-solutions.it/en/contact-support.html



www.eos-solutions.it