


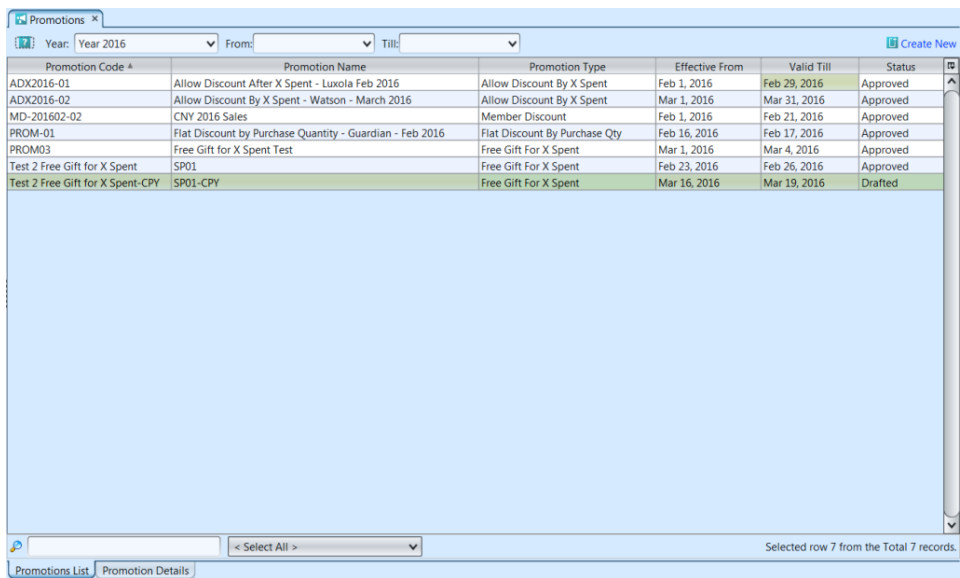


# Promotions

It allows the user to manage promotion for sales process.

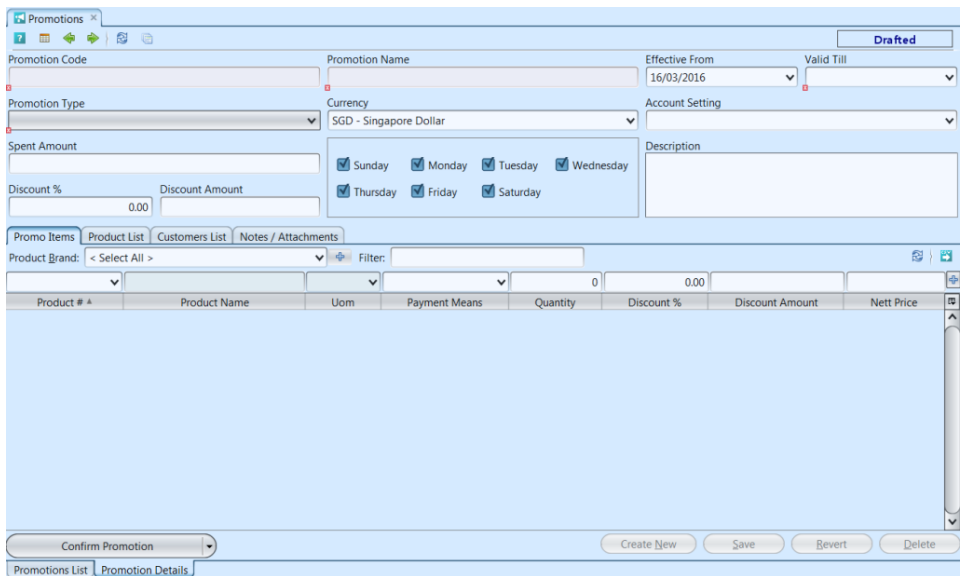
Below actions are available under **"Promotions"**:

-  Create new promotion scheme
-  Update, delete, close, and copy promotion scheme
-  View and search for promotion details



The screenshot shows a table with the following columns: Promotion Code, Promotion Name, Promotion Type, Effective From, Valid Till, and Status. The table contains 7 rows of data.

Promotion Code	Promotion Name	Promotion Type	Effective From	Valid Till	Status
ADX2016-01	Allow Discount After X Spent - Luxola Feb 2016	Allow Discount By X Spent	Feb 1, 2016	Feb 29, 2016	Approved
ADX2016-02	Allow Discount By X Spent - Watson - March 2016	Allow Discount By X Spent	Mar 1, 2016	Mar 31, 2016	Approved
MD-201602-02	CNY 2016 Sales	Member Discount	Feb 1, 2016	Feb 21, 2016	Approved
PROM-01	Flat Discount by Purchase Quantity - Guardian - Feb 2016	Flat Discount By Purchase Qty	Feb 16, 2016	Feb 17, 2016	Approved
PROM03	Free Gift for X Spent Test	Free Gift For X Spent	Mar 1, 2016	Mar 4, 2016	Approved
Test 2 Free Gift for X Spent	SP01	Free Gift For X Spent	Feb 23, 2016	Feb 26, 2016	Approved
Test 2 Free Gift for X Spent-CPY	SP01-CPY	Free Gift For X Spent	Mar 16, 2016	Mar 19, 2016	Drafted



The screenshot shows a form for editing a promotion. It includes fields for Promotion Code, Promotion Name, Effective From, Valid Till, Promotion Type, Currency, Account Setting, Spent Amount, Discount %, Discount Amount, and a list of days (Sunday through Saturday) with checkboxes. There is also a Description field and a table for Promo Items.

**Promo Items Table:**

Product #	Product Name	Uom	Payment Means	Quantity	Discount %	Discount Amount	Nett Price
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Promotions Drafted

Promotion Code:  Promotion Name:  Effective From: 16/03/2016 Valid Till:

Promotion Type:  Currency: SGD - Singapore Dollar Account Setting:

Spent Amount:  Discount %: 0.00 Discount Amount:

Sunday  Monday  Tuesday  Wednesday  
 Thursday  Friday  Saturday

Description:

Promo Items | Product List | Customers List | Notes / Attachments

List of Products		
Product Code	Name	Uom
BD01-003145	Ctrl-A Beauty Balm 40ml	Each
BD01-003146	Black Label Nourishing Beauty Balm SPF 25 (50ml)	Each
BD01-003147	Ceramidin Light Cream 90g	Each
BD01-003148	Doctor's Label Red Improve Purifying Mask	Each
BD01-003148W	Doctor's Label White Improve Purifying Mask	Each
BD01-003149	Ctrl-A Soothing Moisturizer 50g	Each
BD01-003150	Ctrl-A Sensitive Sun Protector 40ml	Each
BD01-BUNDLE	Doctor's Label Red Improve Purifying Mask PO2	Each
BD01-BUNDLE-	Doctor's Label White Improve Purifying Mask PO2	Each
BD02-002130	Jasmine Shower Gel 250ml	Each
BD02-002131	Mint Tea Shower Gel 250ml	Each
BD02-002132	Japanese Rose Shower gel 250ml	Each

Total 122 records.

Confirm Promotion

Promotions List | Promotion Details

Promotions Drafted

Promotion Code:  Promotion Name:  Effective From: 16/03/2016 Valid Till:

Promotion Type:  Currency: SGD - Singapore Dollar Account Setting:

Spent Amount:  Discount %: 0.00 Discount Amount:

Sunday  Monday  Tuesday  Wednesday  
 Thursday  Friday  Saturday

Description:

Promo Items | Product List | Customers List | Notes / Attachments

List of Business Partners		
Partner Code	Name	
4110.011/CO001	Cold Storage - HQ	
4110.011/GU001	Guardian - HQ	
4110.011/LU001	Luxola	
4110.011/ME001	Metro	
4110.011/MU001	Mustafa	
4110.011/RO001	Robinson	
4110.011/SA001	Sasa - HQ	
4110.011/SA002	Sasa - Gateway	
4110.011/SA003	Sasa - Changi	
4110.011/SA004	Sasa - Bugis	
4110.011/SE001	Sephora	
4110.011/TA001	Tang's Department Store	

Total 14 (Of 16) records.

Confirm Promotion

Promotions List | Promotion Details

Promotions Drafted

Promotion Code:  Promotion Name:  Effective From: 16/03/2016 Valid Till:

Promotion Type:  Currency: SGD - Singapore Dollar Account Setting:

Spent Amount:  Discount %: 0.00 Discount Amount:

Sunday  Monday  Tuesday  Wednesday  
 Thursday  Friday  Saturday

Description:

Promo Items | Product List | Customers List | Notes / Attachments

Title	File Size	By User	On Date

Title:

Description:

File Name:  Size: bytes (1)

Confirm Promotion

Promotions List | Promotion Details

Field Name	Description	Mandatory Information
Promotion Code	Custom code for the promotion	Y
Promotion Name	Name of the promotion	Y
Effective from	Start date of the promotion	Y
Valid Till	End date of the promotion	Y
Promotion Type	Type of promotion	Y
Currency	Currency of the promotion	Y
Account Setting	Account setup for the promotion, mandatory for certain promotion type, i.e. Free Gift for X Spent	Depend on Promotion Type
Spent Amount	Minimum amount spent to qualify for the promotion	Depend on Promotion Type
Discount %	Percentage of flat discount given for the promotion	Depend on Promotion Type
Discount Amount	Flat discount amount given for the promotion	Depend on Promotion Type
Day(s) of the Week	Which day(s) the promotion is running on	Y
Description	Description	N
Promo Items tab		
Promo Items – Product #	Product code	Depend on Promotion Type
Promo Items – Product Name	Name of product	Depend on Promotion Type
Promo Items – Uom	Unit of Measurement	Depend on Promotion Type
Promo Items – Payment Means	Payment means of the sale transactions	Depend on Promotion Type
Promo Items – Quantity	Quantity of (free gift) promo item	Depend on Promotion Type
Promo Items – Discount %	Discount given in percentage	Depend on Promotion Type
Promo Items – Discount Amount	Discount given in value	Depend on Promotion Type
Promo Items – Nett Price	Nett price of the promo item	Depend on Promotion Type
Product List tab		
Product List – Product Code	Product code of qualifying product	Depend on Promotion Type
Product List – Name	Name of qualifying product	Depend on Promotion Type
Product List – Quantity	Min. quantity needed to qualify for the promotion	Depend on Promotion Type
Customers List tab		
Customers List – Partner Code	Partner code	Y
Customers List – Name	Partner name	Y

## Create New Promotion Scheme

1. Click **“Create New”** at the top right side of **“Promotions List”** tab, it will open **“Promotion**

**Details**” tab with new form

2. Fill up promotion’s header information on top of screen, and select a Promotion Type. Fields marked with red **x** are mandatory. Below is a list of available Promotion Types:


- **Default:** specific promotion product(s) discounted by % or value
- **Flat Discount By Purchase Qty:** get flat discount by % or value when customer purchase a defined quantity from participating products listed
- **Flat Price By Purchase Qty:** get flat price when customer purchase a defined quantity from participating products listed
- **Free Gift By Purchase Qty:** get free item of certain quantity when customer purchase a defined quantity from participating products listed
- **Free Gift By X Spent:** get free item of certain quantity when customer purchase / spend a defined total amount from participating products listed
- **Allow Discount By X Spent:** get discount by % or value when customer purchase / spend a defined total amount
- **Tender Discount:** get discount by % or value off sales transaction’s total amount when using defined tender / payment means
- **Member Discount:** get discount by % or value off sales transaction’s total amount

3. Click **“Save”** button at the bottom right side of screen

4. For some promotion schemes, user will need to enter promotion info line item in the **“Promo Items”** tab. For product type, user can filter the products list by selecting a brand from **“Product Brand”** drop-down list. In **“Promo Items”** tab, for product type of promotion schemes, add product to be discounted or given away in the promotion scheme by searching for the product from the product number drop-down list. Depending on which type of promotion schemes, user is required to enter the **“Payment Means”, “Quantity”,**

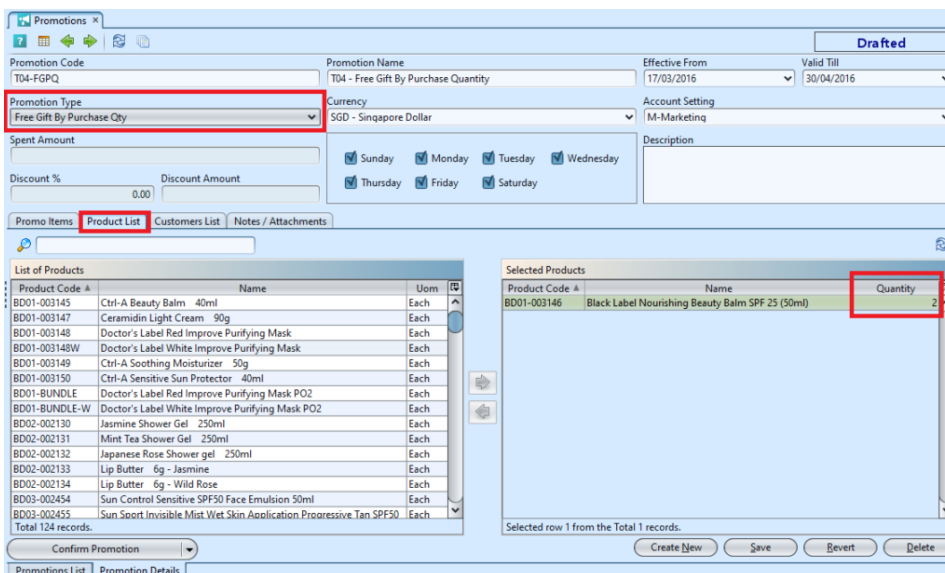
**“Discount %”, “Discount Amount”, and / or “Nett Price”**. Fields marked with red **x** are mandatory

**Note:** Ensure the product is not listed in other promotion schemes during the same period for the same customers list

Click  button to add the promotion line item. Repeat step 4 to add more promo items into the promotion scheme.

5 . For certain promotion schemes, user is required to assign product(s) as the qualifying / participating products. The **“Product List”** tab will be available for selection in this case. Click on the **“Product List”** tab, select product(s) and assign them into the promotion scheme.

For **“Purchase by Quantity”** type of promotion scheme, user must defines the qualifying quantity here for each assigned product. Double click on the line item **“Quantity”** to edit the quantity of the selected product. When customer purchase any product from the list, the system will check whether the promotion’s condition(s) were met, and apply the promotion to the sales transaction when the transaction document is confirmed.



**Example 1: Promotion Type is Free Gift by Purchase Qty.**

Step 1: Select free gift from Promo Item tab.(Ex:

Facial mask x1)

Step 2: Select promotion items from Product List tab.  
(Ex: Moisturizer x2)


**Promotion = Buy 2 moisturizer will free facial mask**

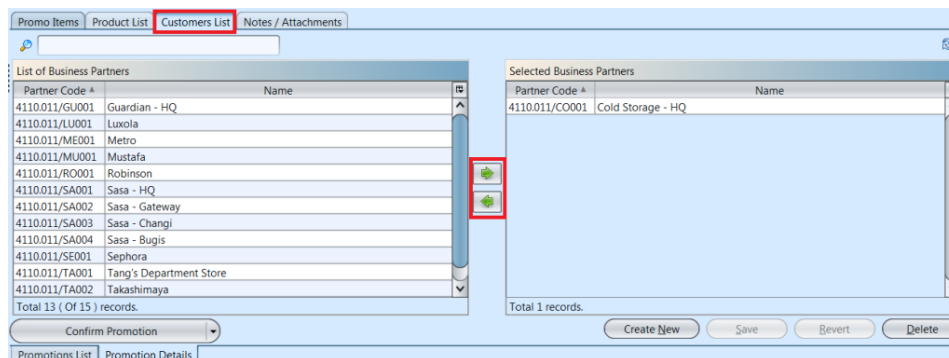
Example 2: Promotion Type is **Allow Discount by X Spent**.

Step 1: Enter the Amount that user is required to spend at **Spent Amount** field. (Ex: \$200)

Step 2: Select products to be discounted and enter the percentage (%) from Product List tab. (Ex: BB Cushion discount 20%)

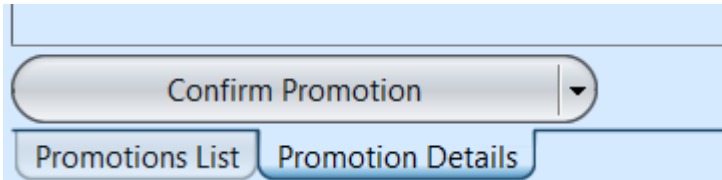
**Promotion = Customer will get 20% discount when purchase BB Cushion if spend \$200 in total.**

6. On **"Customers List"** tab, assign business partners for the promotion scheme by selecting available partner(s) from the bottom left table and click  " " button in middle of screen. Hold Ctrl or Shift key then mouse left-click to select multiple partners

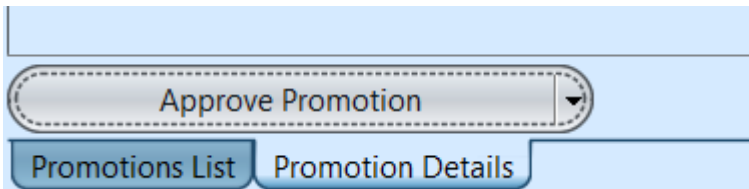


7. Click **"Save"** button at the bottom right side of screen when done

8. Click **"Confirm Promotion"** button at the bottom left side of screen and click "Yes" button to confirm



9. Click **"Approve Promotion"** button at the bottom left side of screen and click **"Yes"** button to approve the promotion scheme



## Update Promotion Details

1. Double click on promotion scheme to be updated, it will bring up the selected promotion details on the **"Promotion Details"** tab. If a promotion scheme's status is **"Confirmed"** or **"Approved"**, right click on the scheme and reopen the scheme first
2. Click **"Save"** button at the bottom right side of the screen when done with the updates
3. Click **"Confirm Promotion"** button at the bottom left side of screen and click **"Yes"** button to confirm
4. Click **"Approve Promotion"** button at the bottom left side of screen and click **"Yes"** button to approve the promotion scheme

## Delete Promotion Scheme

1. Double click on promotion scheme to be deleted, it will bring up the selected promotion details on the **"Promotion Details"** tab. If a promotion scheme's status is **"Confirmed"** or **"Approved"**, right click on the scheme and reopen\* the scheme first.

\***Note:** Promotion that has been used for posted

transactions cannot be re-opened

2. Click on **"Delete"** button at the bottom right side of screen
3. Click on **"Yes"** button on the pop-up window to confirm promotion scheme deletion

## Close Promotion Scheme

1. Double click on promotion scheme to be closed, it will bring up the selected promotion details on the **"Promotion Details"** tab. The promotion scheme's status must be **"Approved"**, for user to be able to close it.
2. Click on arrow at **"Reopen Approved Promotion"** button and click on **"Close Promotion"**\* option
3. Click on **"Yes"** button on the pop-up window to confirm closing\* promotion scheme.

**\*Note:** Closed promotion cannot be reopened!

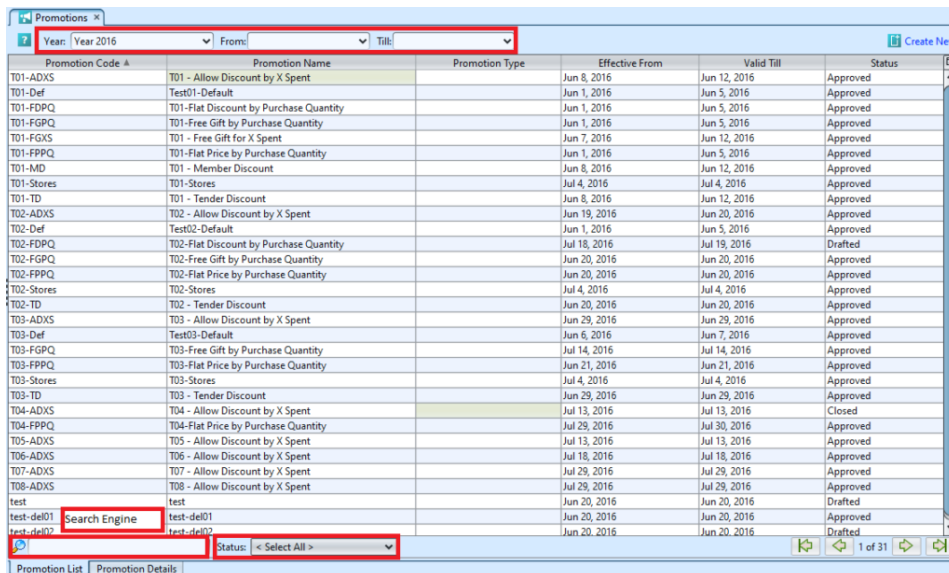
## Copy Promotion Scheme

1. Double click on promotion scheme to be copied, it will bring up the selected promotion details on the **"Promotion Details"** tab.
2. Click on arrow at **"Confirm Promotion"**, **"Approve Promotion"**, or **"Reopen Approved Promotion"** button (depending on the document status) and click on **"Copy Promotion"** option
3. Click on **"Yes"** button on the pop-up window to confirm creating a copy of the promotion scheme.



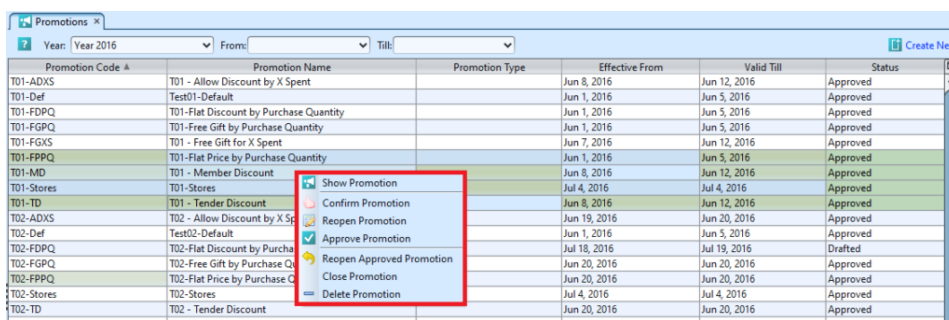
# View and Search for Promotion Details

1. On **"Promotions List"** tab enter search parameter to filter the result, i.e. type in period of the promotion scheme in the **"From"** & **"Till"** textfield boxes or select from drop-down lists



2. Result can be sorted alphabetically by clicking the fields' columns

3. Select promotion schemes / lines from the list view and right-click mouse. This will open options available to the selected line(s).



4. Double click on promotion scheme to view full details of the promotion scheme, it will bring up the details on **"Promotion Details"** tab for the selected promotion