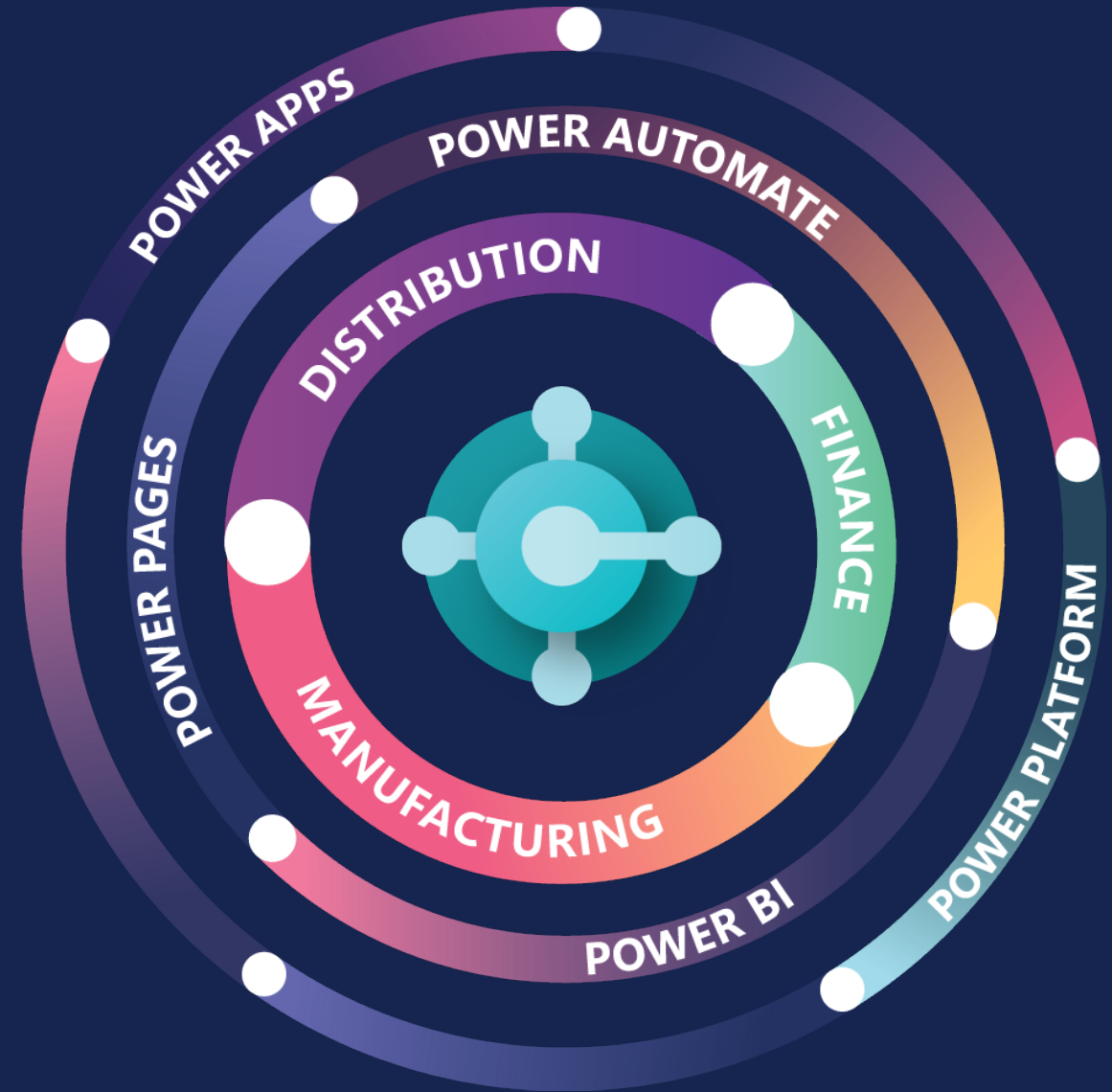


# BUSINESS CENTRAL connect

Smarter Pricing and  
Promotions



18<sup>th</sup> & 19<sup>th</sup> NOVEMBER 2025

# What we'll cover

1. The different pricing models offered in Business Central and the conversion process
2. Using standard Business Central Pricing Tools to increase efficiency in pricing
3. Clever Promotions – Linked to Campaigns
4. Clever Promotions – Buy one, get one free
5. Clever Promotions – Minimum item quantity
6. Clever Promotions – Promotion codes





# Smarter Pricing in Business Central

# Reimagine Sales Pricing with Business Central

- The new Sales Pricing Experience in Business Central is built for modern sellers who demand precision, flexibility, and speed.
- Easily manage complex pricing structures with a clean, user-friendly design. No more digging through layers of settings!
- Create tailored pricing strategies with customer-specific discounts, tiered pricing, and date-based rules.
- Optimise pricing to stay competitive while protecting your bottom line.
- **It's not just pricing – it's strategic selling.**

# Legacy Pricing

- The classic BC pricing experience
- Separate lists for prices and discounts
- All in one long list using filters
- Minimal recent updates

Sales Prices

✓ Saved

+ New Edit List Delete More options

General

Sales Type Filter: None Starting Date Filter: Currency Code Filter: Item No. Filter:

| Sales Type ↑  | Sales Code ↑ | Item No. ↑ | Unit of Measure Code ↑ | Currency Code ↑ | Minimum Quantity ↑ | Unit Price | Starting Date ↑ | Ending Date |
|---------------|--------------|------------|------------------------|-----------------|--------------------|------------|-----------------|-------------|
| Customer      | 10000        | 1896-S     | PCS                    |                 | 0                  | 50.00      |                 |             |
| Customer      | 10000        | 1900-S     | PCS                    |                 | 0                  | 100.00     |                 |             |
| Customer      | 10000        | 1906-S     | PCS                    |                 | 0                  | 110.00     |                 |             |
| Customer      | 20000        | 1906-S     | PCS                    | EUR             | 0                  | 109.00     |                 |             |
| Customer      | 20000        | 1908-S     | PCS                    | EUR             | 0                  | 120.00     |                 |             |
| Customer      | 10000        | 1908-S     | PCS                    |                 | 0                  | 120.00     |                 |             |
| Customer      | 30000        | 1908-S     | PCS                    |                 | 0                  | 120.00     |                 |             |
| → Customer    | ⋮ 40000      | 1908-S     | PCS                    |                 | 0                  | 120.00     |                 |             |
| Customer      | 50000        | 1908-S     | PCS                    | USD             | 0                  | 120.00     |                 |             |
| Customer      | 10000        | 1964-S     | PCS                    |                 | 0                  | 100.00     |                 |             |
| Customer      | 10000        | 1964-S     | PCS                    |                 | 50                 | 95.00      |                 |             |
| Customer      | 10000        | 1964-S     | PCS                    |                 | 100                | 90.00      |                 |             |
| All Customers |              | 2000-S     | PCS                    |                 | 0                  | 180.00     | 1/1/2024        | 12/31/2024  |
| All Customers |              | 2000-S     | PCS                    |                 | 0                  | 172.00     | 1/1/2025        | 12/31/2025  |

# Conversion Process

- Feature Management shows this as enforced from version 28 in April 2026
- Data Update needs to be run in every company in an environment individually
- Different options for conversion, one of which had been largely more beneficial
- Data moves to new tables, can impact reports, modifications, APIs and more

| Feature                                                        | Automatically enabled from                                            |
|----------------------------------------------------------------|-----------------------------------------------------------------------|
| → <a href="#">Feature Update: New sales pricing experience</a> | <a href="#">Learn more</a> 2026 Wave 1 (from April to September 2026) |

### Feature Data Update

**What is updated**  
Records from Sales Price, Sales Line Discount, Purchase Price, Purchase Line Discount, Project Item Price, Project G/L Account Price, Project Resource Price, Project Resource Price, Resource Price, and Resource Cost tables will be copied to the Price List Header and Price List Line tables.

Use default price lists ☒

Existing prices will be converted to default price lists per areas (sales, purchase, and jobs) allowing you to edit prices as in old experience.

[Review affected data](#)

I accept the data update ☒

[Back](#) [Next](#) [Update](#)

# Price List Feature

- Split prices into Price Lists dependent on your process
- Price for each customer? Each Price Group? Campaigns?
- All managed from one screen

|                                                                                                                                                                                              |                                            |        |                          |                  |          |                      |            |               |             |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------|--------|--------------------------|------------------|----------|----------------------|------------|---------------|-------------|
| Sales Price Lists                                                                                                                                                                            |                                            |        |                          |                  |          |                      |            |               |             |
| <div><div><div></div><div></div><div></div></div><div><div></div><div></div><div></div></div><div><div></div><div></div><div></div></div></div> <div><div>+ New</div><div>Manage</div></div> |                                            |        |                          |                  |          |                      |            |               |             |
| Code ↑                                                                                                                                                                                       | Description                                | Status | Allow Updating Defaults  | Defines          | Currency | Assign-to Type       | Assign-to  | Starting Date | Ending Date |
| <a href="#">SPL00001</a>                                                                                                                                                                     | ⋮ All Customers Price List                 | Draft  | <input type="checkbox"/> | Price & Discount |          | All Customers        |            |               |             |
| <a href="#">SPL00002</a>                                                                                                                                                                     | Adatum Price List                          | Draft  | <input type="checkbox"/> | Price & Discount |          | Customer             | 10000      |               |             |
| <a href="#">SPL00003</a>                                                                                                                                                                     | Trey Research Price List                   | Draft  | <input type="checkbox"/> | Price & Discount |          | Customer             | 20000      |               |             |
| <a href="#">SPL00004</a>                                                                                                                                                                     | Chair Campaign Price List                  | Draft  | <input type="checkbox"/> | Price & Discount |          | Campaign             | CP0001     | 10/1/2025     | 10/31/2025  |
| <a href="#">SPL00005</a>                                                                                                                                                                     | Item Discount Groups                       | Draft  | <input type="checkbox"/> | Discount         |          | All Customers        |            |               |             |
| <a href="#">SPL00006</a>                                                                                                                                                                     | Wholesaler Customer Price Group Price List | Draft  | <input type="checkbox"/> | Price            |          | Customer Price Group | WHOLESALER |               |             |

# Price List Feature

- Configure your price lists however you want
- Allow 'updating defaults' to open up a new world of customisation and flexibility
- Edit in Excel to modify data per price list

Sales Price List

SPL00001

Copy Lines... Suggest Lines... Automate Fewer options

**General**

Code: SPL00001 Status: Draft

Description: All Customers Price List Currency Code:

Assign-to Type: All Customers Starting Date:

Assign-to No.: Ending Date:

VAT

VAT Bus. Posting Gr. (Price):

Price Includes VAT: ☒

Line Defaults

Allow Updating Defaults: ☒

Allow Invoice Disc.: ☒

Allow Line Disc.: ☒

View

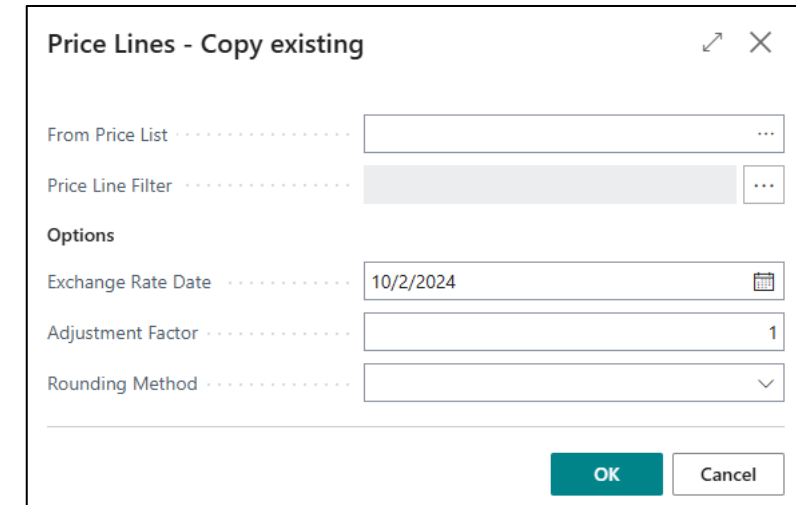
View Columns for: Price & Discount

**Lines** New Line Delete Line

| Product Type | Product No. | Description                | Variant Code | Work Type Code | Unit of Measure Code | Minimum Quantity | Defines          | Unit Price | Allow Line Disc.         | Line Discount % | Allow Invoice Disc.                 |
|--------------|-------------|----------------------------|--------------|----------------|----------------------|------------------|------------------|------------|--------------------------|-----------------|-------------------------------------|
| Item         | 1896-S      | ATHENS Desk                |              |                | PCS                  | 0                | Price & Discount | 225.00     | <input type="checkbox"/> | 0.00            | <input checked="" type="checkbox"/> |
| Item         | 1900-S      | PARIS Guest Chair, black   |              |                | PCS                  | 0                | Price & Discount | 185.00     | <input type="checkbox"/> | 0.00            | <input checked="" type="checkbox"/> |
| Item         | 1906-S      | ATHENS Mobile Pedestal     |              |                | PCS                  | 0                | Price & Discount | 170.00     | <input type="checkbox"/> | 0.00            | <input checked="" type="checkbox"/> |
| Item         | 1908-S      | LONDON Swivel Chair, blue  |              |                | PCS                  | 0                | Price & Discount | 185.00     | <input type="checkbox"/> | 0.00            | <input checked="" type="checkbox"/> |
| Item         | 1925-W      | Conference Bundle 1-6      |              |                | PCS                  | 0                | Price & Discount | 230.00     | <input type="checkbox"/> | 0.00            | <input checked="" type="checkbox"/> |
| Item         | 1920-S      | ANTWERP Conference Table   |              |                | PCS                  | 0                | Price & Discount | 275.00     | <input type="checkbox"/> | 0.00            | <input checked="" type="checkbox"/> |
| Item         | 1936-S      | BERLIN Guest Chair, yellow |              |                | PCS                  | 0                | Price & Discount | 180.00     | <input type="checkbox"/> | 0.00            | <input checked="" type="checkbox"/> |

# Price List Feature – Copy Lines

- Get data from one price list to the next
- Use filters to only get the lines you need
- Verify lines on activation will mean no duplicate prices
- Use different start and end dates so one price list takes over from the other



The screenshot shows a dialog box titled "Price Lines - Copy existing" with a close button (X) in the top right corner. The dialog contains the following fields and options:

- From Price List**: A text input field with a dropdown arrow (three dots) on the right.
- Price Line Filter**: A text input field with a dropdown arrow (three dots) on the right.
- Options**: A section header.
- Exchange Rate Date**: A date input field showing "10/2/2024" with a calendar icon on the right.
- Adjustment Factor**: A text input field showing the value "1".
- Rounding Method**: A dropdown menu with a downward arrow.

At the bottom right of the dialog are two buttons: "OK" (in a teal box) and "Cancel" (in a white box with a grey border).

# Customer Price Groups

- Group customers to have less pricing records and an easier to maintain list
- A price group with 5 prices can be applied to 10 customers meaning 5 records not 50
- 1 company had 200,000 pricing records for 24 products before price groups!

Sales Price List

SPL000006

Copy Lines... Suggest Lines... Automate Fewer options

**General**

Code: SPL000006 Status: Draft

Description: Wholesaler Customer Price Group Price List Currency Code:

Assign-to Type: Customer Price Group Starting Date:

Assign-to No.: WHOLESALER Ending Date:

VAT

VAT Bus. Posting Gr. (Price): Line Defaults

Price Includes VAT: Allow Updating Defaults:

View: Allow Invoice Disc.:

View Columns for: Price Allow Line Disc.:

Lines New Line Delete Line

|   | Product Type | Product No. | Description                | Variant Code | Work Type Code | Unit of Measure Code | Minimum Quantity | Unit Price | Allow Line Disc.                    | Allow Invoice Disc.                 |
|---|--------------|-------------|----------------------------|--------------|----------------|----------------------|------------------|------------|-------------------------------------|-------------------------------------|
|   | Item         | 1900-S      | PARIS Guest Chair, black   |              |                | PCS                  | 50               | 150.00     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
|   | Item         | 1908-S      | LONDON Swivel Chair, blue  |              |                | PCS                  | 50               | 150.00     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| → | Item         | 1936-S      | BERLIN Guest Chair, yellow |              |                | PCS                  | 50               | 150.00     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
|   | Item         | 1960-S      | ROME Guest Chair, green    |              |                | PCS                  | 50               | 150.00     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
|   | Item         | 1964-S      | TOKYO Guest Chair, blue    |              |                | PCS                  | 50               | 150.00     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

# Customer Discount Groups

- How discounts can be applied in bulk to customers
- 1 price list, 5 records, can impact as many customers as you want

Sales Price List  
SPL00007

Verify Lines... Copy Lines... Suggest Lines... Automate Fewer options

**General**

Code: SPL00007 Status: Active

Description: Customer Discount Group Currency Code:

Assign-to Type: All Customers Starting Date:

Assign-to No.: Ending Date:

**VAT**

VAT Bus. Posting Gr. (Price):

Price Includes VAT: ☐

**Line Defaults**

Allow Updating Defaults: ☒

Allow Invoice Disc.: ☐

Allow Line Disc.: ☒

**View**

View Columns for: Discount

**Lines** New Line Delete Line

| Assign-to Type         | Assign-to No. | Currency Code | Starting Date | Ending Date | Product Type | Product No. | Description | Variant Code | Work Type Code | Unit of Measure Code | Minimum Quantity | Line Discount % | Price Incl. VAT          | VAT Bus. Posting Gr. (Price) |
|------------------------|---------------|---------------|---------------|-------------|--------------|-------------|-------------|--------------|----------------|----------------------|------------------|-----------------|--------------------------|------------------------------|
| Customer Disc. Group   | 10            |               |               |             | Item         | *           |             |              |                |                      | 0                | 10.00           | <input type="checkbox"/> |                              |
| Customer Disc. Group   | 20            |               |               |             | Item         | *           |             |              |                |                      | 0                | 20.00           | <input type="checkbox"/> |                              |
| Customer Disc. Group   | 30            |               |               |             | Item         | *           |             |              |                |                      | 0                | 30.00           | <input type="checkbox"/> |                              |
| Customer Disc. Group   | 40            |               |               |             | Item         | *           |             |              |                |                      | 0                | 40.00           | <input type="checkbox"/> |                              |
| → Customer Disc. Group | 50            |               |               |             | Item         | *           |             |              |                |                      | 0                | 50.00           | <input type="checkbox"/> |                              |

# Item Discount Groups

- Same format as customer discount groups
- Apply the discount value per group
- 1 list to manage as appose to record per item

Sales Price List

SPL00008

Copy Lines... Suggest Lines... Automate Fewer options

**General**

Code: SPL00008 Status: Draft

Description: Item Discount Groups Currency Code:

Assign-to Type: All Customers Starting Date:

Assign-to No.: Ending Date:

VAT

VAT Bus. Posting Gr. (Price):

Price Includes VAT: ☐

View

View Columns for: Discount

Line Defaults

Allow Updating Defaults: ☐

Allow Invoice Disc.: ☐

Allow Line Disc.: ☐

Lines | New Line | Delete Line

| Product Type        | Product No. | Description | Variant Code | Work Type Code | Unit of Measure Code | Minimum Quantity | Line Discount % |
|---------------------|-------------|-------------|--------------|----------------|----------------------|------------------|-----------------|
| Item Discount Group | 5%          | 5% Discount |              |                |                      | 0                | 5.00            |
| Item Discount Group | 10%         | 10%         |              |                |                      | 0                | 10.00           |
| Item Discount Group | 15%         | 15%         |              |                |                      | 0                | 15.00           |
| Item Discount Group | 20%         | 20%         |              |                |                      | 0                | 20.00           |
| Item Discount Group | 25%         | 25%         |              |                |                      | 0                | 25.00           |

# Campaign Prices

- Pricing campaigns are ways to have time restricted prices
- Only apply to customers that have the campaign tagged
- Can have a price list per campaign making it easy to manage

Sales Price List - CAMPAIGN SALES PRICE

Manage Verify Lines... Copy Lines... Suggest Lines... Validate Data Page

**General**

Code ..... CAMPAIGN SALES PRICE ..... Status ..... Active .....  
Description ..... Campaign Sales Price ..... Currency Code .....  
Assign-to Type ..... Campaign ..... Starting Date ..... 01/10/2025 .....  
Assign-to No. .... CP0002 ..... Ending Date ..... 31/10/2025 .....  
VAT  
VAT Bus. Posting Gr. (Price) ..... DOMESTIC .....  
Price Includes VAT .....  
View  
View Columns for ..... Price & Discount .....  
**Line Defaults**  
Allow Updating Defaults .....  
Allow Invoice Disc. ....  
Allow Line Disc. ....

Lines | New Line | Delete Line

| Product Type | Product No. | Description                | Variant Code | Work Type Code | Unit of Measure Code | Minimum Quantity | Defines          | Unit Price | Allow Line Disc.         | Line Discount % | Allow Invoice Disc.                 |
|--------------|-------------|----------------------------|--------------|----------------|----------------------|------------------|------------------|------------|--------------------------|-----------------|-------------------------------------|
| → Item       | 1900-S      | PARIS Guest Chair, black   |              |                | PCS                  | 0                | Price & Discount | 150.00     | <input type="checkbox"/> | 0.00            | <input checked="" type="checkbox"/> |
| Item         | 1908-S      | LONDON Swivel Chair, blue  |              |                | PCS                  | 0                | Price & Discount | 150.00     | <input type="checkbox"/> | 0.00            | <input checked="" type="checkbox"/> |
| Item         | 1936-S      | BERLIN Guest Chair, yellow |              |                | PCS                  | 0                | Price & Discount | 150.00     | <input type="checkbox"/> | 0.00            | <input checked="" type="checkbox"/> |
| Item         | 1960-S      | ROME Guest Chair, green    |              |                | PCS                  | 0                | Price & Discount | 150.00     | <input type="checkbox"/> | 0.00            | <input checked="" type="checkbox"/> |
| Item         | 1964-S      | TOKYO Guest Chair, blue    |              |                | PCS                  | 0                | Price & Discount | 150.00     | <input type="checkbox"/> | 0.00            | <input checked="" type="checkbox"/> |
| Item         | 1968-S      | MEXICO Swivel Chair, black |              |                | PCS                  | 0                | Price & Discount | 150.00     | <input type="checkbox"/> | 0.00            | <input checked="" type="checkbox"/> |
| Item         | 1980-S      | MOSCOW Swivel Chair, red   |              |                | PCS                  | 0                | Price & Discount | 150.00     | <input type="checkbox"/> | 0.00            | <input checked="" type="checkbox"/> |



# Clever Promotions

# What is Clever Promotions?

- In a world where customers expect more and margins are tighter than ever, Clever Promotions is your secret weapon for smarter selling in Microsoft Dynamics 365 Business Central
- Whether you're running Buy one, get one free (BOGOF) deals, volume discounts or seasonal campaigns, Clever Promotions gives you the flexibility to launch, manage, and optimise promotions with ease
- No more manual price overrides; just clean, automated logic that works



# Why run a promotion against a campaign?



- Changing line or invoice discounts against 1000s of items can be time consuming
- Running a promotion at various stages of a campaign e.g. Bank holiday can be enticing for customers and increase revenue
- Advertising a promotion keeps your customers engaged and can help you stay ahead of the competition
- Creating a promotion against the campaign allows you to offer additional discounts quickly and easily and without using manual price overrides

# Campaign card

- Campaign card
- Separate lists for prices and discounts
- Start and end dates
- Ability to activate and deactivate sales prices/line discounts
- Assign Global Dimensions and Customer Group codes for reporting

Campaign Card

CP1001 · Increase chair sales

Campaign Prices & Discounts Related ▾ Reports ▾ Automate ▾ Fewer options ⓘ

Activate Sales Prices/Line Discounts Sales Prices Sales Price Lists Sales Discounts Deactivate Sales Prices/Line Discounts

|                     |                      |     |                          |                          |      |
|---------------------|----------------------|-----|--------------------------|--------------------------|------|
| No. ....            | CP1001               | ... | Ending Date ....         | 31/12/2025               | 📅    |
| Description .....   | Increase chair sales |     |                          | Salesperson Code .....   | HR ▾ |
| Status Code .....   | 5-START              | ▾   | Last Date Modified ..... | 17/10/2025               |      |
| Starting Date ..... | 01/09/2025           | 📅   | Activated .....          | <input type="checkbox"/> |      |

**Invoicing**

|                       |   |                          |   |
|-----------------------|---|--------------------------|---|
| Department Code ..... | ▾ | Customergroup Code ..... | ▾ |
|-----------------------|---|--------------------------|---|

# Campaign discounts

- Line or invoice discounts can be added against the campaign
- Campaign price lists may have 1000s of items added
- Campaigns can be time consuming to create and to edit

Campaign CP1001 Increase chair sales

✓ Saved

Price List Lines

# Creating a promotion against a campaign

Promotion

000015

✓ Saved

Enable Promotion

Disable Promotion

Copy Promotion

Automate

Fewer options

General

No.

000015

...

Ending Date

31/12/2025

Allow Currency Conversion

Description

10% off selected chairs - Campaign CP1001

Cannot Be Combined

On Document

Allow Benefit Multiplication

Starting Date

01/10/2025

Currency Code

Enabled

Customer

New Line

Delete Line

Sales Type

Sales Code

Description

→

Campaign

:

CP1001

Increase chair sales

Qualification Criteria

New Line

Delete Line

Criteria Type

Amount

Promotion Code Type

Promotion Code

Item Type

Item No.

→

Minimum Amount

:

500.00

Code

Promotion Item Group

CHAIRS

Promotion Benefit

New Line

Delete Line

Benefit Target Type

Benefit Target Item Type

Benefit Target Item No.

New Line Unit of Measure

New Line Quantity

Discount Type

Discount Amount

Prompt for Confirmation

Set Price

Split Benefit Across Target Lines

→

Qualifying Lines

:

Line Discount %

10

0.00

# How does it work?

← Sales Order

101127 · Relecloud

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

Post... ▾ Release ▾ Credit Control ▾ Create Warehouse Shipment Create Inventory Put-away/Pick... Archive Document Validate Data Reorder Items Payment Gateway Payment Plan Create Payment Plan

General

Customer No. 50000

Customer Name Relecloud

Sell-to

Address Occam Court, 1

Address 2 Surrey

City Guildford

County

Postcode GU2 7YQ

Country/Region Code GB

Contact No. CT000022

Phone No.

Mobile Phone No.

Email jesse.homer@contoso.com

Contact Jesse Homer

No. of Archived Versions 0

Document Date 17/10/2025

Posting Date 17/10/2025

VAT Date 17/10/2025

Order Date 17/10/2025

Due Date 31/10/2025

Requested Delivery Date

Promised Delivery Date

External Document No.

Your Reference

Salesperson Code JO

Campaign No.

Opportunity No.

Responsibility Centre

Assigned User ID

Document Type Code

Style Code

Exclude From Auto Send

Status Open

Credit Status

Work Description

Completely Invoiced

Completely Invoiced Date

Lines Manage Line Order

New Line Delete Line Select items...

| Type   | No. | Item Reference No. | Variant Code | Gen. Bus. Posting Group | Description | Drop Ship...             | Location Code | Bin Code | Quantity | Qty. to Assemble to Order | Reserved Quantity | Unit of Measure Code | Unit Price Excl. VAT | Line Discount % | Line Amount Excl. VAT | Subscription Lines |
|--------|-----|--------------------|--------------|-------------------------|-------------|--------------------------|---------------|----------|----------|---------------------------|-------------------|----------------------|----------------------|-----------------|-----------------------|--------------------|
| → Item | *   |                    |              |                         | *           | <input type="checkbox"/> |               |          |          |                           |                   |                      |                      |                 |                       | 0                  |

Subtotal Excl. VAT (GBP) 0.00

Invoice Discount % 0

Total VAT (GBP) 0.00

Total Excl. VAT (GBP) 0.00

Total Incl. VAT (GBP) 0.00

# Buy one get one free (BOGOF) set up

- First set up your promotion item group & add your items

Promotion Item Groups

🔍 + New 📋 Edit List 🗑 Delete ✎ Edit 👁 View

| Code ↑         | Description                |
|----------------|----------------------------|
| 5%OFF          | 5% off chairs              |
| AIRPUMP        | Air pumps                  |
| → BOGOF        | Buy 1 Get 1 free           |
| CHAIRS         | All Chairs                 |
| COFFEEMACHINES | Coffee machines promotions |
| MEALDEAL       | Meal deal BOGOF offer      |
| SEPTMEALDEAL   | September Meal Deal        |

Promotion Item Group

✎ 📋 + 🗑 ✓ Saved 📋 ↗

## BOGOF

+ Add Items | More options

---

### General

Code ..... BOGOF Description ..... Buy 1 Get 1 free

---

Items 📋 New Line ✕ Delete Line 📋 ↗

| Item No. ↑ | Description  |
|------------|--------------|
| → 1001     | Testing tool |
| 1030       | Hammer       |
| 1031       | Chisel       |
| 1032       | Small Wrench |

# Buy one get one free (BOGOF) set up

- Quick tip – items can be added quickly they are allocated an Item Category Code on the item card

Filter Page

Filter: Item

× No. ....

× Description .....

× Vendor No. ....

× Item Category Code .....

+ Filter...

Filter totals by:

+ Filter...

| Code      | Description     |
|-----------|-----------------|
| DESK      | Office Desk     |
| TABLE     | Assorted Tables |
| MISC      | Miscellaneous   |
| SUPPLIERS | Office Supplies |
| PARTS     | Parts           |
| + New     |                 |

Show details Select from full list

# Buy one get one free (BOGOF)

Promotion

000012

✓ Saved

Enable Promotion

Disable Promotion

Copy Promotion

Automate

Fewer options

General

No.

000012

...

Ending Date

31/10/2025

...

Allow Currency Conversion

Description

Buy 1 get 1 free selected tools

Cannot Be Combined

On Document

...

Allow Benefit Multiplication

Starting Date

08/09/2025

...

Currency Code

...

Enabled

Customer

New Line

Delete Line

Sales Type

Sales Code

Description

→

All Customers

Qualification Criteria

New Line

Delete Line

Criteria Type

Amount

Promotion Code Type

Promotion Code

Item Type

Item No.

→

Minimum Quantity (Base)

1.00

Code

Promotion Item Group

BOGOF

Promotion Benefit

New Line

Delete Line

Benefit Target Type

Benefit Target Item Type

Benefit Target Item No.

New Line Unit of Measure

New Line Quantity

Discount Type

Discount Amount

Prompt for Confirmation

Set Price

Split Benefit Across Target Lines

→

New Line

Same Item

1.00

Line Discount %

100

0.00

# Buy one get one free (BOGOF) in action

Sales Order

101131 · The Big Fish Co

Home

Prepare

Print/Send

Request Approval

Order

Actions

Related

Automate

Fewer options

Post...

Release

Credit Control

Create Warehouse Shipment

Create Inventory Put-away/Pick...

Archive Document

Validate Data

Reorder Items

Payment Gateway

Payment Plan

Create Payment Plan

General

Show less

Customer No. C00020

Customer Name The Big Fish Co

Sell-to

Address The Street

Address 2

City Hackney

County Greater London

Postcode E8 3NR

Country/Region Code GB

Contact No. CT000027

Phone No. 0203 666 7777

Mobile Phone No. 07777 666666

Email thebigfish@gmail.com

Contact Pete Richmond

No. of Archived Versions 0

Document Date 20/10/2025

Posting Date 20/10/2025

VAT Date 20/10/2025

Order Date 20/10/2025

Due Date 20/11/2025

Requested Delivery Date

Promised Delivery Date

External Document No.

Your Reference

Salesperson Code

Campaign No.

Opportunity No.

Responsibility Centre

Assigned User ID

Document Type Code

Style Code

Exclude From Auto Send

Status Open

Credit Status

Work Description

Completely Invoiced

Completely Invoiced Date

Lines

Manage

Line

Order

Show Lines with Issues

New Line

Delete Line

Select items...

| Type   | Description | Drop Ship...             | Location Code | Bin Code | Quantity | Qty. to Assemble to Order | Reserved Quantity | Unit of Measure Code | Unit Price Excl. VAT | Line Discount % | Line Amount Excl. VAT | Subscription Lines | Customer Subscription Contract No. | Vendor Subscription Contract No. | Line Discount Amount | Prepayment % | Qty. |
|--------|-------------|--------------------------|---------------|----------|----------|---------------------------|-------------------|----------------------|----------------------|-----------------|-----------------------|--------------------|------------------------------------|----------------------------------|----------------------|--------------|------|
| → Item | *           | <input type="checkbox"/> |               |          |          |                           |                   |                      |                      |                 |                       | 0                  |                                    |                                  | 0.00                 | 0            |      |

Subtotal Excl. VAT (GBP) 0.00

Invoice Discount % 0

Total VAT (GBP) 0.00

Tax Discount Amount Excl. VAT (GBP) 0.00

Total Excl. VAT (GBP) 0.00

Total Incl. VAT (GBP) 0.00

# Minimum item quantity promotion

Promotion

000013

Enable Promotion

Disable Promotion

Copy Promotion

Automate

Fewer options

General

No.000013

Ending Date01/11/2025

Allow Currency Conversion

Description10% off minimum quantity of 12 - item 1001 only

Cannot Be CombinedOn Document

Allow Benefit Multiplication

Starting Date01/09/2025

Currency Code

Enabled

Customer

New Line

Delete Line

| Sales Type      | Sales Code | Description |
|-----------------|------------|-------------|
| → All Customers | :          |             |
|                 |            |             |
|                 |            |             |

Qualification Criteria

New Line

Delete Line

| Criteria Type             | Amount | Promotion Code Type | Promotion Code | Item Type | Item No. |
|---------------------------|--------|---------------------|----------------|-----------|----------|
| → Minimum Quantity (Base) | 12.00  | Code                |                | Item      | 1001     |
|                           |        |                     |                |           |          |
|                           |        |                     |                |           |          |

Promotion Benefit

New Line

Delete Line

| Benefit Target Type | Benefit Target Item Type | Benefit Target Item No. | New Line Unit of Measure | New Line Quantity | Discount Type   | Discount Amount | Prompt for Confirmation             | Set Price | Split Benefit Across Target Lines |
|---------------------|--------------------------|-------------------------|--------------------------|-------------------|-----------------|-----------------|-------------------------------------|-----------|-----------------------------------|
| → Qualifying Lines  | :                        |                         |                          |                   | Line Discount % | 10              | <input checked="" type="checkbox"/> | 0.00      | <input type="checkbox"/>          |
|                     |                          |                         |                          |                   |                 |                 |                                     |           |                                   |
|                     |                          |                         |                          |                   |                 |                 |                                     |           |                                   |

# Minimum item quantity in action

Sales Order

101132 · The Big Fish Co

Home

Prepare

Print/Send

Request Approval

Order

Actions

Related

Automate

Fewer options

Post...

Release

Credit Control

Create Warehouse Shipment

Create Inventory Put-away/Pick...

Archive Document

Validate Data

Reorder Items

Payment Gateway

Payment Plan

Create Payment Plan

General

Customer No. C00020

Customer Name The Big Fish Co

Sell-to

Address The Street

Address 2

City Hackney

County Greater London

Postcode E8 3NR

Country/Region Code GB

Contact No. CT000027

Phone No. 0203 666 7777

Mobile Phone No. 07777 666666

Email thebigfish@gmail.com

Contact Pete Richmond

No. of Archived Versions 0

Document Date 20/10/2025

Posting Date 20/10/2025

VAT Date 20/10/2025

Order Date 20/10/2025

Due Date 20/11/2025

Requested Delivery Date

Promised Delivery Date

External Document No.

Your Reference

Salesperson Code

Campaign No.

Opportunity No.

Responsibility Centre

Assigned User ID

Document Type Code

Style Code

Exclude From Auto Send

Status Open

Credit Status

Work Description

Completely Invoiced

Completely Invoiced Date

Lines

Manage

Line

Order

Show Lines with Issues

New Line

Delete Line

Select items...

| Type   | No. | Item Reference No. | Variant Code | Gen. Bus. Posting Group | Description | Drop Ship...             | Location Code | Bin Code | Quantity | Qty. to Assemble to Order | Reserved Quantity | Unit of Measure Code | Unit Price Excl. VAT | Line Discount % | Line Amount Excl. VAT | Subscription Lines |
|--------|-----|--------------------|--------------|-------------------------|-------------|--------------------------|---------------|----------|----------|---------------------------|-------------------|----------------------|----------------------|-----------------|-----------------------|--------------------|
| → Item | *   |                    |              |                         | *           | <input type="checkbox"/> |               |          |          |                           |                   |                      |                      |                 |                       | 0                  |

Subtotal Excl. VAT (GBP) 0.00

Invoice Discount % 0

Total VAT (GBP) 0.00

Inv. Discount Amount Excl. VAT (GBP) 0.00

Total Excl. VAT (GBP) 0.00

Total Incl. VAT (GBP) 0.00

# Promotion codes Group

- Promotion codes are a great way to engage with customers
- They are easy to generate and very flexible
- You can create many codes and email them to individual customers and specify how many times the code can be used
- Or generate a single code and send out to multiple customers which is available for 50 uses so only the first 50 customers will benefit from the promotion
- They can be used to reward customer loyalty
- Or to entice customers that haven't ordered for a while to place an order



# Generate promotion codes

← Promotion Code Group

+

✓ Saved

10%OFF

Generate Codes

Automate

Fewer options

General

Code

10%OFF

Max. No. of Uses

1

Description

10% off all tools

Code Format

?10%OFF#

Promotion Codes 

New Line

Delete Line

Code ↑

No. of Uses

|   |  |  |   |
|---|--|--|---|
| → |  |  | 0 |
|   |  |  |   |

# Create your promotion

Promotion

000016

Enable Promotion

Disable Promotion

Copy Promotion

Automate

Fewer options

General

No.000016

Ending Date31/12/2025

Allow Currency Conversion

Description10% off SPEND OVER £100 - All tools

Cannot Be CombinedOn Document

Allow Benefit Multiplication

Starting Date01/09/2025

Currency Code

Enabled

Customer

New Line

Delete Line

|   | Sales Type | Sales Code | Description        |
|---|------------|------------|--------------------|
| → | Customer   | 20000      | Trey Research      |
|   | Customer   | 10000      | Adatum Corporation |
|   | Customer   | C00020     | The Big Fish Co    |
|   | Customer   | C00050     | The Pink Octopus   |
|   | Customer   | C00080     | Atlantic Fish Co   |

Qualification Criteria

New Line

Delete Line

|   | Criteria Type  | Amount | Promotion Code Type | Promotion Code | Item Type            | Item No. |
|---|----------------|--------|---------------------|----------------|----------------------|----------|
|   | Promotion Code | 0.00   | Group               | 10%OFF         | Item                 |          |
| → | Minimum Amount | 100.00 | Code                |                | Promotion Item Group | TOOLS    |

Promotion Benefit

New Line

Delete Line

|   | Benefit Target Type | Benefit Target Item Type | Benefit Target Item No. | New Line Unit of Measure | New Line Quantity | Discount Type   | Discount Amount | Prompt for Confirmation             | Set Price | Split Benefit Across Target Lines   |
|---|---------------------|--------------------------|-------------------------|--------------------------|-------------------|-----------------|-----------------|-------------------------------------|-----------|-------------------------------------|
| → | All Lines           | Promotion Item Group     | TOOLS                   |                          |                   | Line Discount % | 10              | <input checked="" type="checkbox"/> | 0.00      | <input checked="" type="checkbox"/> |

# Add promotion code to a sales order

Sales Order

101133 · The Big Fish Co

Home

Prepare

Print/Send

Request Approval

Order

Actions

Related

Automate

Fewer options

Post...

Release

Credit Control

Create Warehouse Shipment

Create Inventory Put-away/Pick...

Archive Document

Validate Data

Reorder Items

Payment Gateway

Payment Plan

Create Payment Plan

General

Show less

Customer No. C00020

Customer Name The Big Fish Co

Sell-to

Address The Street

Address 2

City Hackney

County Greater London

Postcode E8 3NR

Country/Region Code GB

Contact No. CT000027

Phone No. 0203 666 7777

Mobile Phone No. 07777 666666

Email thebigfish@gmail.com

Contact Pete Richmond

No. of Archived Versions 0

Document Date 20/10/2025

Posting Date 20/10/2025

VAT Date 20/10/2025

Order Date 20/10/2025

Due Date 20/11/2025

Requested Delivery Date

Promised Delivery Date

External Document No.

Your Reference

Salesperson Code

Campaign No.

Opportunity No.

Responsibility Centre

Assigned User ID

Document Type Code

Style Code

Exclude From Auto Send

Status Open

Credit Status

Work Description

Completely Invoiced

Completely Invoiced Date

Lines

Manage

Line

Order

Show Lines with Issues

New Line

Delete Line

Select items...

| Type   | No.  | Item Reference No. | Variant Code | Gen. Bus. Posting Group | Description  | Drop Ship...             | Location Code | Bin Code | Quantity | Qty. to Assemble to Order | Reserved Quantity | Unit of Measure Code | Unit Price Excl. VAT | Line Discount % | Line Amount Excl. VAT | Subscription Lines |
|--------|------|--------------------|--------------|-------------------------|--------------|--------------------------|---------------|----------|----------|---------------------------|-------------------|----------------------|----------------------|-----------------|-----------------------|--------------------|
| → Item | 1032 |                    |              | DOMESTIC                | Small Wrench | <input type="checkbox"/> |               |          | 6        |                           |                   | PCS                  | 25.00                |                 | 150.00                | 0                  |
|        |      |                    |              |                         |              |                          |               |          |          |                           |                   |                      |                      |                 |                       |                    |
|        |      |                    |              |                         |              |                          |               |          |          |                           |                   |                      |                      |                 |                       |                    |

Subtotal Excl. VAT (GBP) 150.00

Invoice Discount % 0

Total VAT (GBP) 30.00



# Benefits

- Promotions help with customer engagement and encourage spend
- Create a suite of promotions and use the copy function to quickly create your next promotion
- Keep ahead of the competition using promotions
- The options are endless
  - Buy 1 Get 1 Free same item or a different item
  - Minimum spend
  - Minimum quantity
  - Offer a promotional item e.g. Spend over £500 and get a free item
  - Quirky promotions e.g. 12 days of Christmas (offering a promotion on a different item each day on the run up to Christmas)



# Any questions?



Many thanks for your time