

How To Enter a Promotion

A Promotion provides the greatest flexibility when selecting items that will be offered at a temporarily discounted price. Items can be selected individually, by a range of items, by category or manufacturer.

Navigate to Inventory | Pricing | Access Promotions.

Select **Add** to create a new promotion in the Access Promotions window.

The screenshot shows the 'Promotion Detail' window with the following fields and controls:

- Promotion ID:** A text field for entering the promotion ID.
- Description:** A text field for entering the promotion description.
- Start Date:** A date and time selector set to 07/30/14 12:00 AM.
- End Date:** A date and time selector set to 07/30/14 11:59 PM.
- Total Revenue:** A numeric field set to 0.00.
- Loyalty Point Value:** A numeric field set to 0 points / dollar.
- Status:** Radio buttons for Active (selected), Inactive, and Delete.
- Promotion Potential Table:** A table with columns: Selected Item, Revenue, Cost of Goods, Margin, and Margin %.

Selected Item	Revenue	Cost of Goods	Margin	Margin %
All Items	0.00	0.00	0.00	0.0


Below the table, there are tabs for 'Items' and 'Sites'. The 'Items' tab is active, showing a table with columns: Item ID, Item Desc, Std Price, Sale Price, Cost, Margin %, On Hand, and Qty Sold. On the left side of the 'Items' table, there is a vertical toolbar with buttons: ADD, R, C, M, T, and a trash icon.

Follow the steps to enter a Promotion.

1. Enter a Promotion ID in this eight character alpha-numeric field.
2. Enter a description for this promotion in this fifty character alpha-numeric field.
3. Enter the period of time the Promotion is effective.

- **Start Date** - Start Date and time of the promotion will begin. Select the Start Date from the drop down menu or click into the field and type a Date. Click into the time field to alter the start time from the default of 12:00 AM.
- **End Date** - End Date and time of the promotion will begin. Select the End Date from the drop down menu or click into the field and type a Date. Click into the time field to alter the start time from the default of 11:59 PM.

4. Add Items to the Promotion using any combination of methods available.

 - Add an individual item then tab to the Sale Price column and enter the Sale Price.

R - Add a range of items by entering a beginning and ending Item ID. Enter the discount percentage for these items.

C - Add a category of items. When adding a category of items, specify the category and the amount of discount to be applied to the L1 Current Price. Use the drop down to specify if the discounted price should apply to Any Site, Promotion Sites or No to allow the promotional price to be used for On Hand Quantity and Discontinued items only. Once items have been added to the Item grid, they can be edited or deleted.

Add Items by Category to Promotion

Select a category and optionally a manufacturer to add to the current promotion

On Hand Only

Discontinued Only ☐

Category

Manufacturer

Discount

M - Manufacturer - Select a Manufacturer ID and select if Discontinued Only.

T - Tag Items - A method of adding multiple items at once based on shared criteria. See Tagging Items for more information.



- Import Items - Upload items for a promotion from a two column .csv file.

5. Add Sites One or multiple sites can be to a Promotion on the Sites tab. If no site is selected, the promotion will be available to all Sites a user has access.



- Add an individual Site- Add an individual Site by entering the Site ID or select F12 to search.



- Tag Sites - A method of adding multiple Sites at once based on shared criteria.



- Region - Add Sites by selecting a Management Region.



- Import Sites - Upload Sites for a promotion from a two column .csv file. See above for details.



- Delete a Row - Select Delete a row to remove a Site from the promotion.