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OPEN LABS BUSINESS SOLUTIONS

SALES PROMOTIONS

User's Manual - VERSION 0.1



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Installation

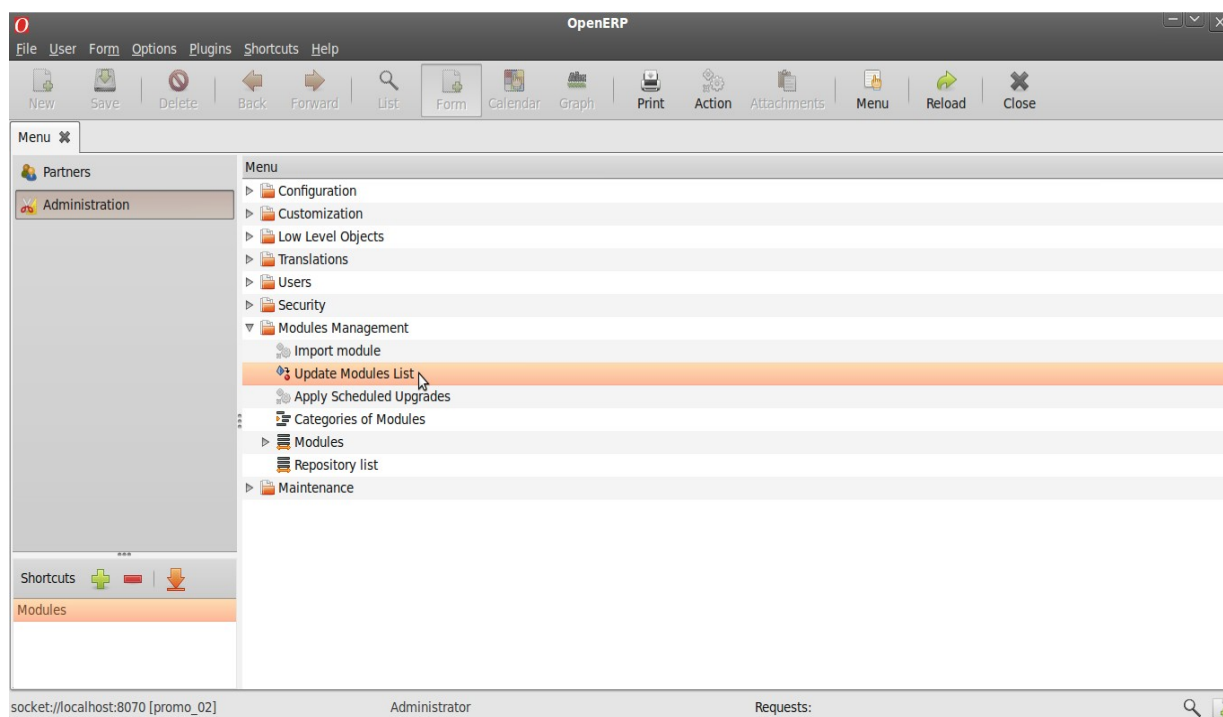


Illustration 1: Menu to Module Installation

- Copy the module to the Python Path of Open ERP.
- Goto Administration >> Modules and Search for the module as shown.

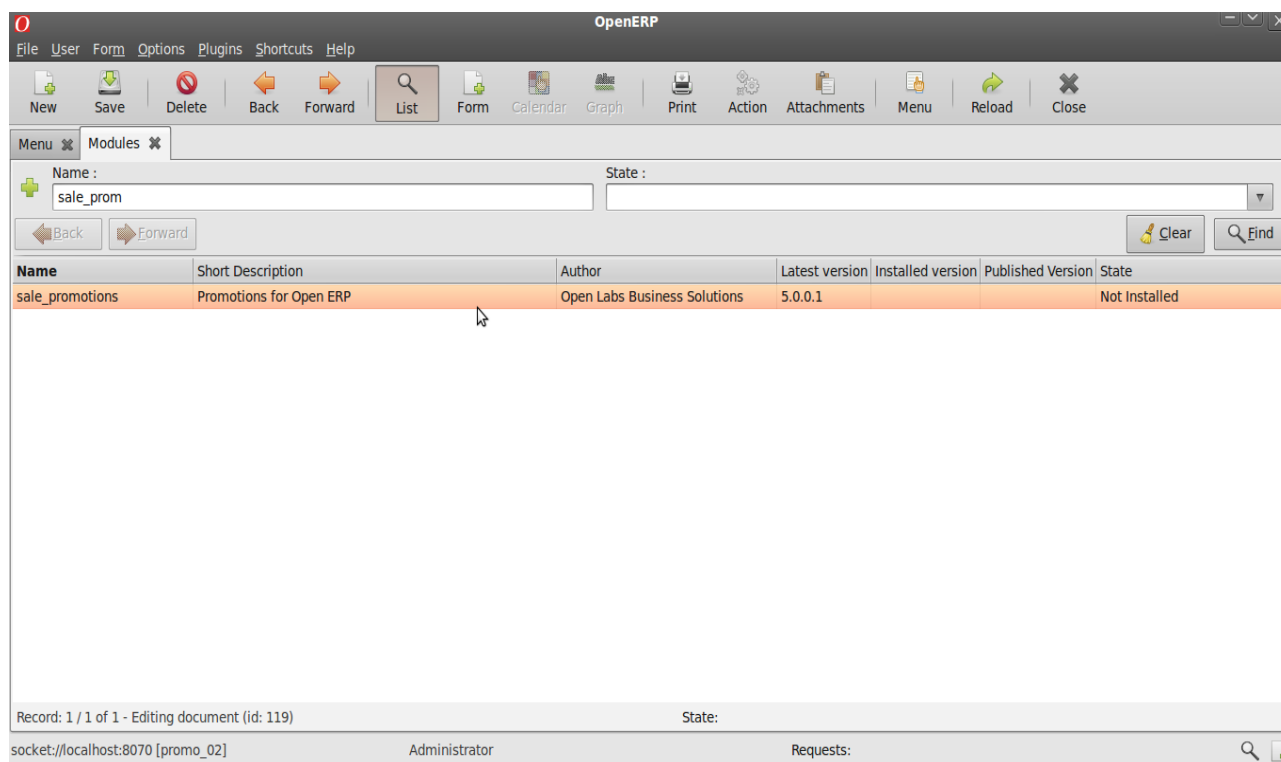


Illustration 2: Module selection

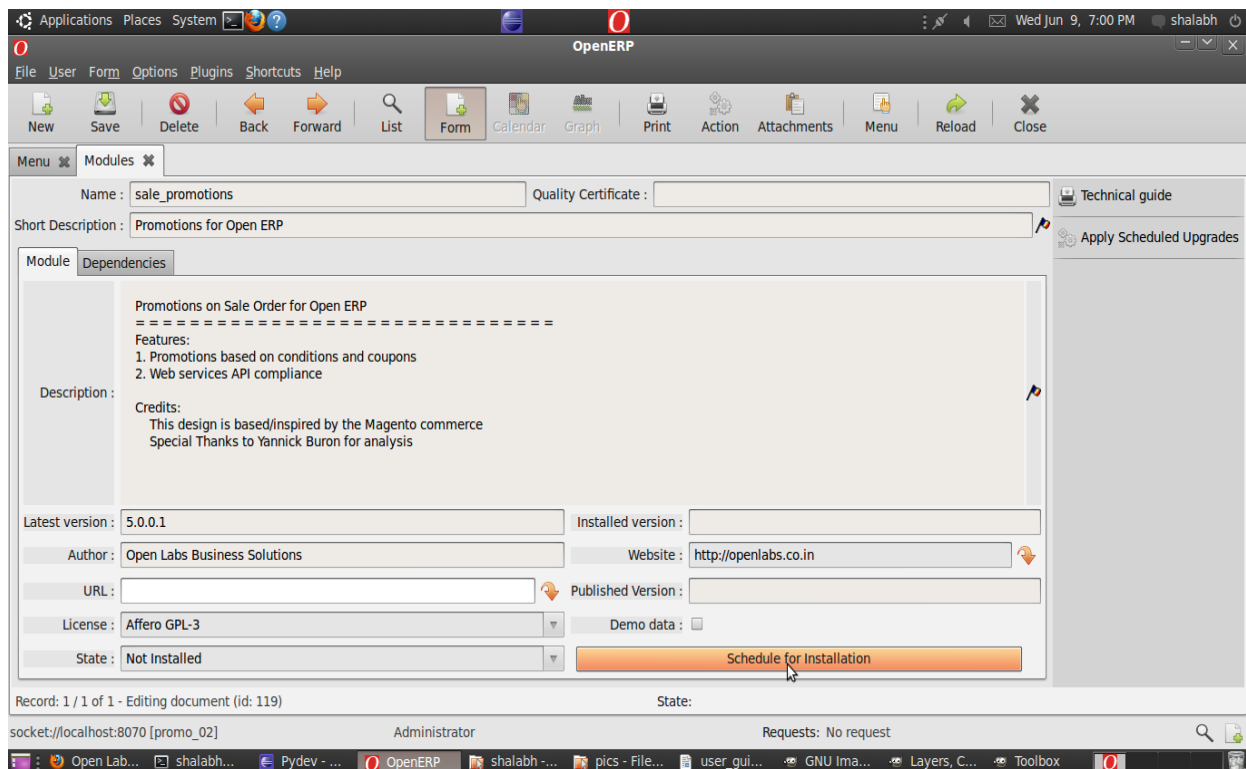


Illustration 3: Installing the module

Install the module by clicking 'Schedule for Installation'

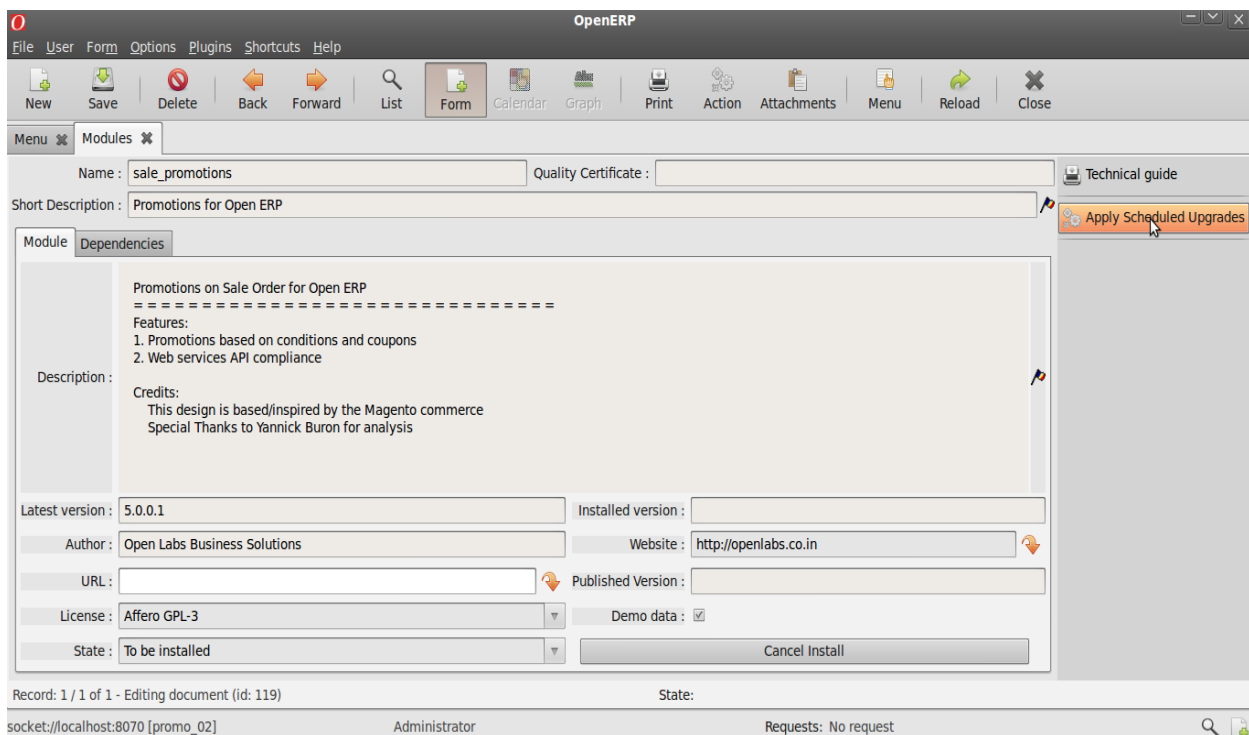


Illustration 4: Applying the new module

Click on 'Apply Scheduled Upgrades' to perform actual Installation.

The module with the dependency module (sale) will be installed. If this module is already installed, only this module will be installed.

Dealing with Promotions

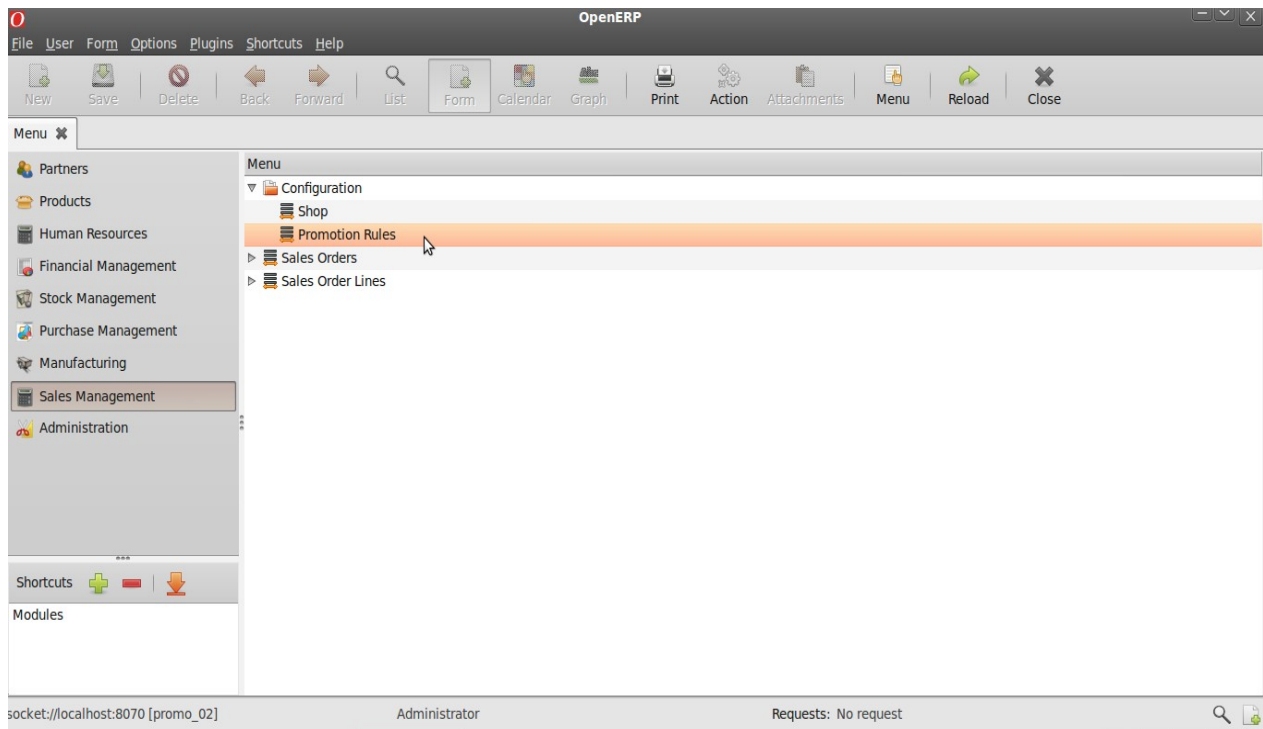


Illustration 5: Reaching Promotions

Goto Sales Management >> Configuration >> Promotion Rules

The screenshot shows the 'Promotion Rules' form in OpenERP. The form has a header section with fields for 'Promo Name' (Promotion1), 'Sequence' (10), 'Active' (checked), and 'Shop' (Tiny sprl). Below this is a 'Description' field containing the text: 'If the Total amount of sale order is >= 5000, then 5% discount is given on sub total.' The form is divided into two main sections: 'Coupon/Voucher Settings' and 'Applicable Period'. The 'Coupon/Voucher Settings' section includes fields for 'Coupon Code' (123456), 'Number of Coupon Uses' (0), 'Uses per Coupon' (20), and 'Uses per Partner' (5). The 'Applicable Period' section includes fields for 'From Date' (2010/06/01 19:09:00) and 'To Date' (2010/06/30 19:09:00). Below these sections is a 'Conditions' tab with a table for 'Expressions'. The table has columns for 'Sequence', 'Stop further checks', 'Attribute', 'Comparator', and 'Value'. The first row shows '0', 'checked', 'Any', 'equals', and 'True'. The status bar at the bottom indicates 'socket://localhost:8070 [promo_02]', 'Administrator', and 'Requests: 1 request(s)'.

Sequence	Stop further checks	Attribute	Comparator	Value
0	<input checked="" type="checkbox"/>	Any	equals	True

Illustration 6: Creating a New Promotion

Now we will try to create a promotion with the aim as described in **Description**.

Creating Expressions

Enter all the details here as per the requirements.

Here a demonstration of how expressions and actions are designed will be given.

The screenshot shows the 'Promotion Rules' configuration window. The 'Promo Name' is 'Promotion1', 'Sequence' is '10', and 'Active' is checked. The 'Shop' is 'Tiny sprl'. The 'Description' field contains the text: 'If the Total amount of sale order is >= 5000, then 5% discount is given on sub total.' The 'Coupon/Voucher Settings' section shows 'Coupon Code' as '123456', 'Number of Coupon Uses' as '0', 'Uses per Coupon' as '20', and 'Uses per Partner' as '5'. The 'Applicable Period' shows 'From Date' as '2010/06/01 19:09:00' and 'To Date' as '2010/06/30 19:09:00'. The 'Conditions' tab is active, showing a list of expressions. The 'Total Amount' expression is selected, and the condition is set to 'greater than or equal to 5000'. The status bar at the bottom indicates 'No record selected', 'State: Document Saved.', and 'Requests: 1 request(s)'.

Illustration 7: Choosing expression validity.

Above illustration shows how the list of expressions below can be used. Here either all the the expressions can be applied or either any of them. User can also choose between making the expressions True or False for actions to act on them.

The screenshot shows the 'Promotion Rules' configuration window with the 'Expressions' tab active. A dropdown menu is open, showing a list of attributes: 'Untaxed Total', 'Tax Amount', 'Total Amount', 'Product Code in order', 'Product Quantity combination', 'Product UnitPrice combination', 'Product SubTotal combination', 'Product NetPrice combination', 'Product Discount combination', 'Product Weight combination', 'Compute sub total of products', 'Compute sub total excluding products', and 'Custom domain expression'. The 'Total Amount' attribute is highlighted. The status bar at the bottom indicates 'No record selected', 'State:', and 'Requests: 1 request(s)'.

Illustration 8: Choosing an attribute.

An attribute is chosen above which will be the criteria for comparison.

The screenshot shows the 'Promotion Rules' form in OpenERP. The 'Conditions' tab is active, displaying a table with columns: Sequence, Stop further checks, Attribute, Comparators, and Value. The first row shows '0' for Sequence, a checked 'Stop further checks' box, 'Total Amount' for Attribute, 'greater than or equal to' for Comparators, and '0.00' for Value. A dropdown menu is open over the 'greater than or equal to' option, showing other available comparators: equals, not equal to, greater than, less than, less than or equal to, is in, and is not in.

Illustration 9: Choosing an comparator.

The figure above shows how a comparator is chosen. This will compare the value of attribute from sale order with the value defined here as shown in the next illustration.

The screenshot shows the 'Promotion Rules' form in OpenERP, now with the 'Expressions' tab active. The table from the previous illustration is still visible, but the 'Value' column for the 'greater than or equal to' comparator is highlighted, and the value '5000' has been entered. The 'Stop further checks' box is still checked.

Illustration 10: Choosing a value for comparison.

Defining Actions

File User Form Options Plugins Shortcuts Help

New Save Delete Back Forward List Form Calendar Graph Print Action Attachments Menu Reload Close

Menu Promotion Rules

Promo Name: Sequence: Active: ☒

Shop: ?Stop Checks: ☐

Description

If the Total amount of sale order is >= 5000, then 5% discount is given on sub total.

Coupon/Voucher Settings

Coupon Code: Number of Coupon Uses:

Uses per Coupon: Uses per Partner:

Applicable Period

From Date: To Date:

Conditions Actions Partner Categories

Actions

Sequence	Action	Product Code	Arguments
0	Discount % on Sub Total		

No record selected

socket://localhost:8070 [promo_02] Administrator Requests: 1 request(s)

Illustration 11: Choosing an action.

An action can be chosen from the list that has to be performed when sale order attributes meet an expression.

Arguments can be set as required. Actions will be performed according to these arguments.

File User Form Options Plugins Shortcuts Help

New Save Delete Back Forward List Form Calendar Graph Print Action Attachments Menu Reload Close

Menu Promotion Rules

Promo Name: Sequence: Active: ☒

Shop: ?Stop Checks: ☐

Description

If the Total amount of sale order is >= 5000, then 5% discount is given on sub total.

Coupon/Voucher Settings

Coupon Code: Number of Coupon Uses:

Uses per Coupon: Uses per Partner:

Applicable Period

From Date: To Date:

Conditions Actions Partner Categories

Actions

Sequence	Action	Product Code	Arguments
0	Discount % on Sub Total	5	

No record selected

socket://localhost:8070 [promo_02] Administrator Requests: 1 request(s)

Illustration 12: Setting arguments.

Above the product code field is useful when some action is chosen to be acted on a product specifically. Here product needs to be entered. This field is self explanatory. An example is shown below.

The screenshot shows the 'Promotion Rules' form in OpenERP. The 'Promo Name' is 'Promotion1', 'Sequence' is '10', and 'Active' is checked. The 'Shop' is 'Tiny sprl'. The 'Description' field contains the text: 'If the Total amount of sale order is >= 5000, then 5% discount is given on sub total.' The 'Coupon/Voucher Settings' section shows 'Coupon Code' as '123456', 'Number of Coupon Uses' as '0', 'Uses per Coupon' as '20', and 'Uses per Partner' as '5'. The 'Applicable Period' section shows 'From Date' as '2010/06/01 19:09:00' and 'To Date' as '2010/06/30 19:09:00'. The 'Actions' tab is selected, showing a table with one action:

Sequence	Action	Product Code	Arguments
0	Discount % on Product	'product_code'	0.00

The status bar at the bottom indicates 'No record selected', 'State:', 'socket://localhost:8070 [promo_02]', 'Administrator', and 'Requests: 1 request(s)'.

Illustration 13: Example of an action related to product. Here product_code needs to be replaced with required code of a product.

The screenshot shows the 'Promotion Rules' form in OpenERP, similar to the previous one. The 'Actions' tab is selected, and the 'Partner Categories' sub-tab is active. A search bar is visible with the text 'Full Name' and 'Customer' entered. The status bar at the bottom indicates 'No record selected', 'State:', 'socket://localhost:8070 [promo_02]', 'Administrator', and 'Requests: 1 request(s)'.

Illustration 14: Setting Partner Categories.

Any promotion will be applicable to any sales order if the partner's category there matches the Partner Category/Categories chosen here.

Promotions work on sales orders

The screenshot shows the OpenERP Sales Order form with the 'Other data' tab selected. The 'Promo Coupon Code' field is highlighted with the value '123456'. Other fields include Order Reference: SO004, Customer Ref, Shop: Tiny sprl, Date Ordered: 2010/06/09, and various policy dropdowns like Packing Policy, Shipping Policy, and Invoice on.

Illustration 15: Setting coupon code to be applied on sales order.

A coupon code can be added to a sale order in the Other Data Tab as shown above.

The screenshot shows the OpenERP Sales Order form with the 'Sales order lines' tab selected. The 'Sales order lines' table displays three items: Basic PC, Medium PC, and a promotion line. The promotion line shows a discount of -270.00. The 'Apply Promotions' button is highlighted.

Description	Qty	UoM	Discount (%)	Unit Price	Net Price	Subtotal
[PC1] Basic PC	2.00	PCE	0.00	450.00	450.00	900.00
[PC3] Medium PC	5.00	PCE	0.00	900.00	900.00	4,500.00
Promotion1	1.00	PCE	0.00	-270.00	-270.00	-270.00

Summary: Untaxed Amount: 5130.00, Taxes: 0.00, Total: 5130.00. Buttons: Compute, Apply Promotions, Confirm Order, Cancel Order.

Illustration 16: Applying Promotions.

Promotions can be applied to a sale order by clicking on the Apply promotion Button.

Notice a new line has been added showing the discount done as per the promotion defined in illustrations above.

About Open Labs Business Solutions

Open Labs Business Solutions is a global Information Technology and Management Consulting company that helps small and medium businesses achieve high efficiency with cost effective business solutions. With customers and partners in 4 continents, Open Labs designs and delivers technology-enabled innovative business solutions that address the needs of small and medium enterprises. Open Labs provides end to end solutions to businesses using a range of Free and Open Source Solutions (FOSS) implemented by a team of highly skilled workforce comprising of domain and business experts.

The software division of Open Labs is a specialized division for Rapid Application Development of business applications with a proven expertise in Open ERP (and Open Object), Tryton and Django.

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