

Promotional Pricing

Temporarily pricing a product or service below list price or below cost in order to attract customers is promotional pricing. In BatchMaster WEB, the *Promotional Pricing* screen allows you to store a special price that can be offered to all customers, a group of customers, or a selected customer on a sales order. This price can be further discounted by a monetary discount or a percentage discount as maintained on the *Promotional Pricing* screen.

When an order quantity is entered for an item location on a normal sales order or a sales quotation/requisition, the system utilizes the settings at the *Price Search Order* screen to determine if the item's price and any applicable discounts should be taken from this screen. The following sequence (in decreasing priority) is used for considering any discounts defined on this screen:

- When the price source is **Contract**, no discount is applicable.
- When the price source is **Promotional Pricing**, line discounts are applied as per the *Promotional Pricing* screen.
- When the price source is **other** than Contract or Promotional Pricing, the line discount is obtained from one of the *Price Matrix* screens, depending on the price search order.
- When the price source is a **Price Matrix**, any extra discount specified on the Price Matrix is added to the *Order Discount* field of the sales order line item.

Go To: Sales → Sales Master Data → Promotional Pricing

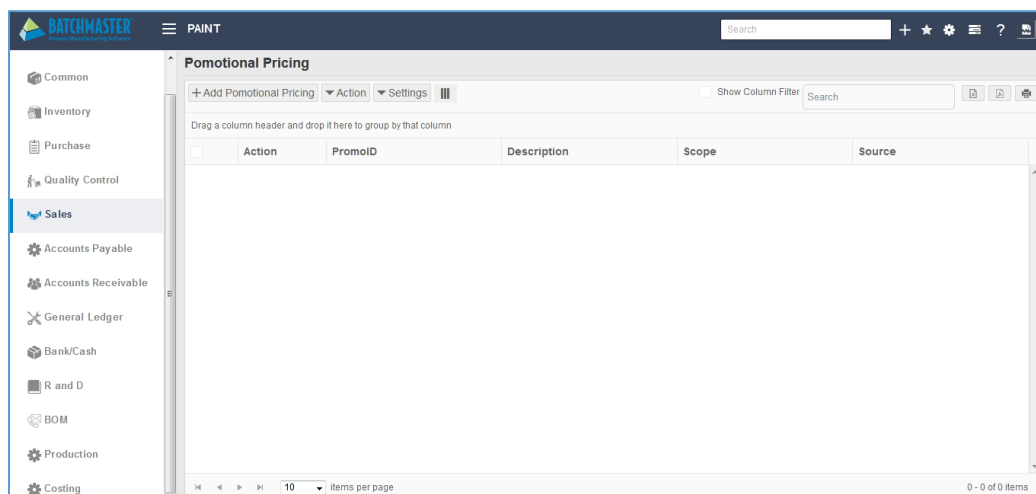


Prerequisite: Data should be set up at the following screens before creating a promotional price:

- *Customer.*
- *Customer Group.*
- *Item Master.*
- *Item Class.*
- *Price Group.*

Promotional Pricing – Dashboard

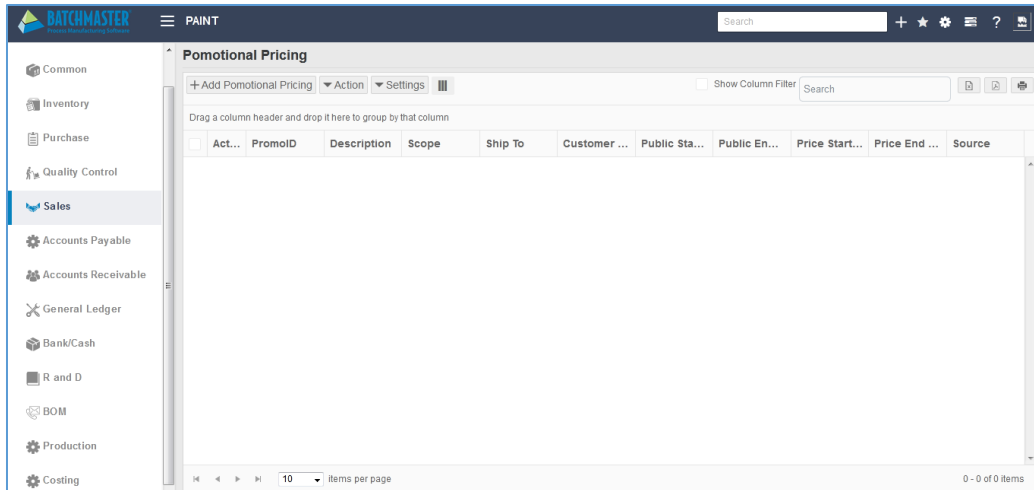
You can manage Promotional Pricing from this dashboard. By default, the system displays all the existing Promotional Pricing as maintained for your business/company. You can click on any of the Promotional Pricing record to view its details.



The *Promotional Pricing* dashboard contains many elements that occupy 100% of the browser window.

Resizing the window would resize the elements to fit. The elements can be rearranged, i.e., docked, resized, grouped, and stacked. The header and the side panel can't be rearranged.

After you select all the columns of the *Promotional Pricing* dashboard, the middle grid displays the selected columns.



The *Promotional Pricing* dashboard provides a clear vision of the created records in a read-only mode. You can view the created Promotional Pricing records as per the number of pages provided per page.

Promotional Pricing Screen – Add Mode

To add a new Promotional Pricing to your BatchMaster database, click on the + *Add Promotional Pricing* button. The system displays the *Promotional Pricing screen*, where you can create a new record.

Promotional Pricing Header Fields:

Promotional Pricing Key: This is the unique identification key to denote promotional price.

Description: Any description pertaining to Promotional pricing can be specified here.

Price Start Date: This is the date when the promotional price became or will become effective.

Price End Date: This is the expiration date for the promotional price.

Public Start Date: This field denotes the date from when promotional pricing is offered to the public.

This date can be greater than or equal to the Price Start Date and less than or equal to the Public End Date. This field is for reporting purposes only.

Public End Date: This field denotes the date till when the promotional pricing offer is applicable in Public. The Public End Date can be greater than or equal to the Public Start Date and less than or equal to the Price End Date.

Scope: This is the scope of the promotional pricing. This field has three options:

1. Customer
2. Customer Group
3. All Customers
4. Ship To

Scope: Selecting an option defines the scope of the applicability of the promotional price. The Promotional Price is limited to the customers within the selected scope. In case customer has multiple ship to locations, which are fairly at a distance, in such cases the pricing may vary. Hence defining the scope as "Ship To" allows user to clearly define the pricing for each customer in accordance to the delivery locations.

Customer: This field becomes enabled only if the option selected at the field 'Scope' is 'Customer'. This field specifies the customer to whom the promotional price is applicable.

Customer Description: This field displays the description associated with the customer. This is a read-only field.

Customer Group: This field becomes enabled only if the option selected at the field 'Scope' is 'Customer Group'. This field specifies the Customer Group to whom the promotional price may apply.

Customer Group Description: This field displays the description associated with the customer group.
This is a read-only field.

Source: This field has the following options:

1. Item
2. Price Group
3. Item Class
4. Item Location
5. Invoice Total

The promotional price will be available only for those items on a sales order, which fall under the purview of the selected option at this field.

Home Currency: This field displays the Currency of the BatchMaster WEB Company as fetched from the Company Information Master.

Promotional A/c: This is the promotional account key.

Promotional Account Description: This field displays the description associated with the Promotional Account. This is a read-only field.

Promotional Pricing Details Grid:

Source Key: This column specifies an item, a price group, an item class or invoice total depending on the option selected at the field 'Source'. The lookup here displays the values corresponding to the option selected at the field 'Source'.

Base Price: This field specifies the price to be offered as a promotional price.

Type: This column of the grid has three options:

1. **Monetary Unit Amount:** For this discount type, the discount amount applies to each unit of the item on the sales order. On a sales order, for a line item having price source as Promotional pricing, the *Promo Discount Amt* is multiplied with QtyOrder (converted to the items sales UOM)

to calculate this discount amount. This discount value appears as a 'Line Discount' on the sales order line item.

2. **Monetary Amount:** For this discount type, the extension will be discounted by a flat monetary amount. On a sales order, for a line item having price source as Promotional Pricing, the 'DiscAmt' value appears as a 'LineDiscount' on the sales order line item. This type of discount is independent of the quantity ordered.
3. **Percentage Amount:** On a sales order, for a line item having price source as Promotional Pricing, the extension will be discounted by the specified percentage amount. This discount appears as a 'LineDiscount' on the sales order line item.

Discount: This is the amount of the discount.

Add Line: Click this button to add a new line in the grid.

Creating a Promotional Price

1. Open the *Promotional Pricing* dashboard.
2. Click on the *+Add Promotional Pricing* button to open a new blank record.
3. This action defaults the *Price Start Date*, *Price End Date*, *Public Start Date*, and *Public End Date* fields with the Current Server Date.
4. Enter a unique identification code in the *Promotional Pricing Key* field.
5. Enter a description of the promotional price key in the *Description* field.
6. Change the displayed dates, as required.
7. Specify a value in the *Scope* field using the dropdown next to the field. Available options are *Customer*, *Customer Group*, *All Customers*, and *Ship To*.
8. Select a Customer, Customer Group, or Ship To as per the value entered in the *Scope* field. If Ship To has been selected, the field label for *Customer* would change to *Ship To*.
9. Specify a value in the *Source* field using the lookup next to the field. Available options are *Item*, *Price Group*, *Item Class*, *Item Location*, and *Invoice Total*.
10. Select a General Ledger account in the *Promotional A/c* field which will hold the value of all discounts offered via this Promotional Pricing.

11. Enter Promotional Pricing Details:

- a. Click on the *Add Line* button to insert a new line in the grid.
- b. This action defaults the *Promo ID*, *RecUserID*, and *RecDate* field.

PromoID	Source Key	Location	Base Price	Type	Discount	RecUserID	RecDate	Action
PP01				Monetary Unit Amount	0	ASHVINI	Tue Jun 23 2020 17:23:1	

- c. If the *Item*, *Price Group*, *Item Class*, or *Item Location* option is selected in the *Source* field, select a source key. The lookup next to the field will display a list appropriate to the source selected.
- d. Enter a base price.
- e. If the source selected is Invoice Total, then enter an amount in the *Base Price* field for the invoice total above which the discount will apply.

Base Price	Type	Discount	Action
10	Monetary Unit Amount	3	

- f. Select the appropriate value in the *Type* field using the dropdown next to the field. The available options are *Monetary Unit Amount*, *Monetary Amount*, or *Percentage Amount*.
- g. Enter the applicable discount in the *Discount* field.

12. Click on the *Save* button to save the promotional price record.