TERNPOINT

USER GUIDE

TPS Trade Promotions

TPS Trade Promotions

TPS Promotions (TPM) is a Ternpoint Solutions App for Microsoft Dynamics 365 Business Central (BC), that allows the automatic calculation and application of promotional pricing on sales documents. If setup, the promotional price can be moved from the revenue account to a different G/L Account upon invoicing.

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LICENSING

A companion app to manage licensing is automatically installed when any app from Ternpoint Solutions is installed. This means if you have installed any other app from Ternpoint Solutions you can skip to step 3.

1. A new **Permissions Set** was added as part of the companion app install. **TPS LM LICENSE MGT.** Assign this permission sets to users in advance of use, on the **User Setup** card.
2. Extension Setup.
    a. Search for and open **Extension Management.**
    b. Select **Ternpoint License Management** and open.
    c. Ensure *Allow HttpClient* Requests is activated.
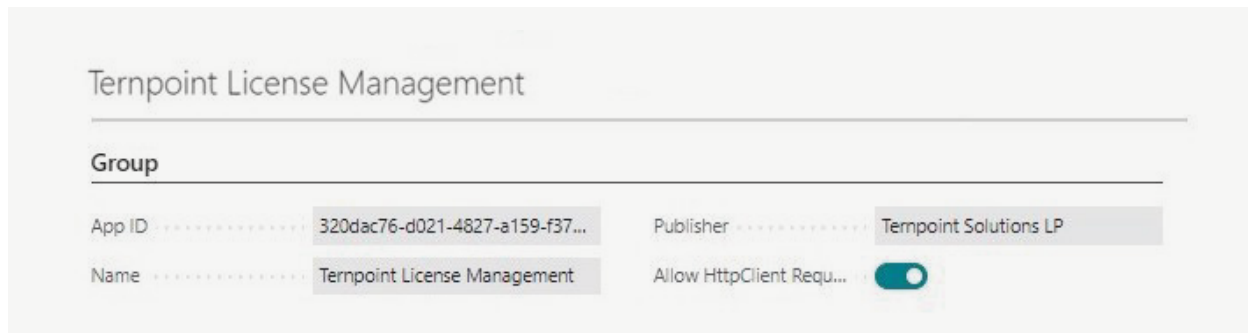
3. Ternpoint Product Registration (must be completed in each BC company the app is being used in).
    a. Search for and open **Ternpoint Product Registration.**
        i. On this page all subscription types *Ternpoint Solutions apps* that have been installed are shown.
        ii. Also from this page you can:
            i. Contact Support
            ii. View your subscription status
            iii. Create a trial license
            iv. Apply for an extension to your trial license
            v. Request a full one year license.
        iii. Enter appropriate Contact Info and select **Register** in the ribbon.
            i. *The license fee is per Business Central tenant. This means if other Ternpoint Solutions apps have already been purchased, you should ensure that the same contact information is used across all Business Central companies to avoid a second monthly subscription fee.*
        iv. In the line section of the page select **Create Trial License.**
4. A 30 day trial license will be created for evaluation purposes.
5. If more time is needed to evaluate the app please select the **Extend License** or **Contact Support.**
6. In order to purchase a full license please select **Request Full License.**
    a. Email setup must be enabled in order to send emails requesting licenses or to contact support using the link.
7. In order to uninstall the app, navigate to Extension Management, select the app and select Uninstall in the ribbon.

NOTE: For any licensing issues or questions please contact Licensing@Ternpoint.Solutions.

TPM PERMISSIONS

1. Three new **Permissions Sets** were added as part of the main app install. **TPS PRM TRDPROM READ, TPS PRM TRDPROMOTION** and **TPS PRM TRDPROM EDIT.** Assign these permissions sets to users in advance of use, on the **User Setup** card or through Entra.

SETUP

1. Search for **Promotion Setup** and open the page. The setups here are:
    a. The number series for Promotions.
    b. **Journal Template Name** and **Journal Batch Name** which are used to create and post general journal to move the promotion from sales account to the account specified on the promotion card.
        i. This setup can be ignored if promotions are not credited to the sales account.
    c. **Disable Promotions** can be used to turn off the app without uninstalling.
    d. **User Defined Fields** (2 per data type) have been added for additional data tracking. Once a field caption is entered the field will then show on the **Promotion**. Fields without a caption are not shown.

PROMOTIONS BUYING GROUPS

1. Search for **Promotion Buying Groups** and open the page.
2. Enter a new **Code** and **Description**.
3. Enter a default **Pay- to Customer No.** for the Buying Group (can be changed on an individual **Promotion**).
4. To add a customer, select **Customers** and add a new customer(s).
5. To add multiple customers at once select **Add Multiple Customers**, on the customer list that opens, select the **button** with 3 dots then **Select More** and select additional customers with the radio button and press **OK** when done.
6. Press **OK** to complete adding customers to **Promotion Buying Groups**.

Promotion Item Group Lines			Not saved
Item No. ↑		Description	
75463		Kirkland Signature Mixed Smoothie Blend	
→ 75465		Kirkland Signature Frozen Peach Halves	

ITEM GROUPS

1. Search for **Item Groups** and open the page.
2. Enter a **Code** and **Description**.
3. To add an **Item**, select the Items option in the ribbon and add a new Item record in the list that opens.
4. To add multiple items at once select **Add Multiple Items**, on the Item list select the **button** with 3 dots then **Select More** and select additional Items.
    a. From the list filter, select Items and, then select multiple items.
    b. Press **OK** when done.
5. Press **OK** to complete adding Items to **Promotional Item Groups**.

Select - Item Groups				
Code ↑		Description		No. of Items
→ ALPINE SKI REBATE	:	Alpine Ski House		4
TREY RESEARCH REBATE		Trey Research		7
TREY RESEARCH Y REB		Trey Research Yearly		3

SETTING UP A PROMOTION

A **Promotion** is the part of the app that defines the customer(s), item(s), dates and values for the **Promotion**.

1. Search for **Promotion** and open page.
2. The **No.** will populate from the number series populated in the **Setup** section above.
3. Enter a **Description** for the program.
4. Select the **Source Type** as either a specific customer, all customers or a group of customers.
    a. Note: Customers are linked to Promotion at the **Sell-to Customer Level.** If there are multiple customer locations or Sell-To Customers that should be included in the **Promotion**, then the **Customer Buying Group** as the **Source Type** should be selected to include all customer locations.
5. Select the **Source No.**
6. If the **Source Type** is set to **Customer**, then a **Ship-to** for that customer can be specified. If blank the **Promotion** is active for all **Ship-to's** for that **Customer**.
7. Select the **Balancing Promotion Account** (G/L Account) where Promotion will be credited at time of invoicing, if appropriate.
8. Select the duration of the program by filling in the **Starting Date** and **Ending Date**
    NOTE: the promotion needs to be setup before orders are released/posted and cannot be setup retroactively as it affects the sales line price used in posting.
9. Select **Global Dimension 1 and 2 codes** if applicable (names of these Dimensions will be unique to your setup in the G/L setup for global Dimension 1 and 2).
10. Leave **Currency Code** blank for local currency (multi-currency functionality will be added in a later release).
11. In the lines.
    a. In the **Line Type** select whether the **Promotion** is for all Items one Item or a group of Items.
    b. In the **No.** Field select an Item code or an Item Group code depending on what was selected in the **Line Type.** Leave blank for all Items.
    c. If appropriate, enter a **Minimum Quantity.** This will be on an order-by-order basis for the minimum that must be ordered for the line to become active.
    d. Optionally, if using **Item** as the **Line Type** you can specify a **Unit of Measure Code,** and **Variant Code.**
        i. When a **Unit of Measure Code** is selected this is the **Promotion Amount** per that unit of measure. For example if the item is sold in cases and there are 20lbs in a case the promotion can be setup as .25 per lb. When calculating on a sales line if 10 cases are being sold at $100 per case then the promotion will be $5 per case.
        ii. **Unit of Measure Code** is only considered when using **Promotion Amount** not **Promotion %.**
    e. Enter a **Promotion %** *or* a **Promotion Amount**.

12. When the **Promotion** is complete select **Activate** in the ribbon.

USING PROMOTIONS ON SALES ORDERS

1. When entering orders if the Customer, Item and Date setups match and active Promotion then the expected promotion values will be calculated on **Release** of the Sales Order or by manually using the function to calculate it.
     a. To manually calculate the Promotion value, select **Release ▸ Calculate Promotion** at any time in the order entry process to calculate the expected Promotion value on all lines.
     b. NOTE: Multiple **Promotions** can be active on the same sales order line.

2. The **Original Unit Price** is the standard sales price that is entered or calculated on a line from sales price or item card. The **Unit Price Excl. Tax** is the **Original Unit Price** plus the **Promotion** unit price.
3. To check on an expected **Promotion** that has been calculated on an open Sales Order select **Promotion Entries** in the header ribbon or at the line level drill into the **Total Promotion Unit Price**
4. Posted **Promotion** entries can be found by searching for **Promotion Entries** or by opening the **Promotion** and selecting **Promotion ▸ Promotion Entries.**

PROMOTION BALANCE RE-POSTING

1. When invoicing an order that has a **Promotion** applied to the line and that **Promotion** has a **Balancing Promotion Account** selected the promotion is taken out of the item's revenue account based on the posting group setup and moved to the **Balancing Promotion Account** using a **General Journal.**