

TERNPOINT



USER GUIDE

TPS Trade Promotions

TERNPOINT.SOLUTIONS



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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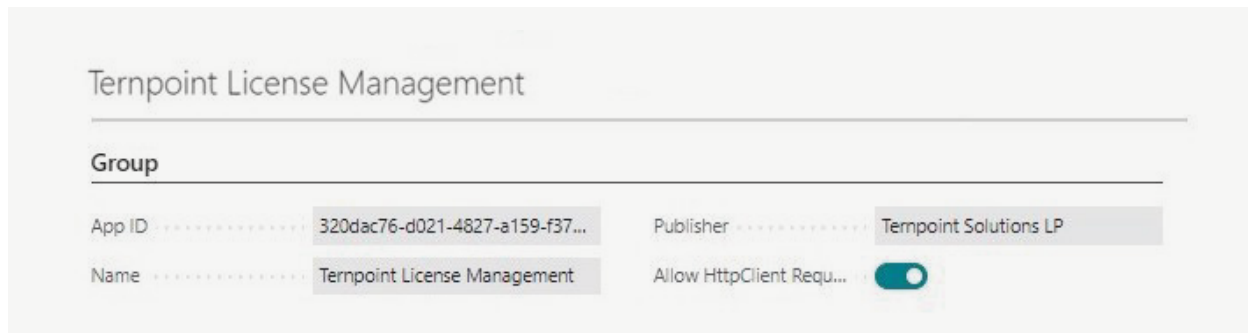
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LICENSING

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.



Tempoint Product Registration

Product Registration

Retrieve All Licenses

Contact Support

More options

General

Subscription ID

{165980df-4be4-4e54-b04e-947bc3871564}

Environment

Production

Registered

☐

Registered On

7/21/2023

Verify License for Sandbox

☐

Contact Info

First Name

Jason

Last Name

Sanders

E-Mail

jsanders@outlook.com

Phone No.

555-555-2323

Contact ID

{M561a65-2b29-4082-8534-1f9f12780e94}

Company

Applications

New Line

Delete Line

Create Trial License

Extend License

Request Full License

App Id	App Name	Subscription Type	Subscription Status	Installed On	Expires On	Product ID
→ {a528a73c-3e79-47cc-b0e5-b068b683ecdf}	Vendor Certificates	Production	Active	7/21/2023 11:41 AM	7/21/2024 6:50 PM	{ec1907a7-29e1-42a0-9379-e29f126a9bdf}

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.

Promotion Setup

General

Promotion Nos.

PROM

Journal Batch Name

DEFAULT

Journal Template Name

GENERAL

Disable Promotions

☐

User Defined Fields

Decimal 1

Budget

Decimal 2

Text 1

Sign off notes

Text 2

Program notes

Boolean 1

Approved

Boolean 2

Code 1

Approved by

Code 2

Date 1

Selling Start Date




Date 2










Selling End Date



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   

   |  New  Edit List  Delete   

	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   |  New  Edit List ...  

	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**.

PROM0014

Promotion | Automate | Fewer options

General

No.	PROM0014	Balancing Promotion Account	Customer Group Code
Description	\$1 per case promo	Starting Date	1/1/2025
Source Type	Customer	Ending Date	12/31/2025
Source No.	10000	Department Code	
Ship-to Code		Activated	<input checked="" type="checkbox"/>
		Created At	4/1/2025 12:56 PM
		Modified At	8/26/2025 7:08 AM

User Defined Fields

Budget	75,000.00	Program notes		Selling End Date	4/30/2026
Sign off notes	Signed off by client 08/01/25	Approved	<input checked="" type="checkbox"/>	Approved by	SALES
		Selling Start Date	8/4/2025		

Promotion Lines | [New Line](#) | [Delete Line](#)

Line Type	No.	Description	Minimum Quantity	Unit of Measure Code	Variant Code	Qty. per Unit of Measure	Promotion %	Promotion Amount	Promotion Amount Base
Item	1009	20 lbs case	0	CS		20		1	0.05

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



USING PROMOTIONS ON SALES ORDERS

- 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.
 - 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.
 - NOTE: Multiple **Promotions** can be active on the same sales order line.

S-ORD101211 · Adatum Corporation

Home Prepare Print/Send Request Approval Order Navigate Report Promotion Entries Actions Related Automate Fewer options

Post... Reopen Create Warehouse Shipment Create Inventory Put-away/Pick... Archive Document

General

Customer Name Adatum Corporation Posting Date 1/16/2025

Contact Robert Townes Order Date 1/16/2025

Document Date 1/16/2025 Due Date 2/16/2025

Lines Manage Line Order

New Line Delete Line Service Commitments Select Items...

Type	No.	Description	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. Tax	Original Unit Price	Total Promotion Unit Price	Tax Group Code
Item	1003	24X12oz Koshed Dill Pickles		10	PCS	12.60	12.00	0.60	NONTAXABLE

- 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.
- 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**
- Posted **Promotion** entries can be found by searching for **Promotion Entries** or by opening the **Promotion** and selecting **Promotion ► Promotion Entries**.

S-ORD101211

Promotion Entries Navigate More options

Entry No.	Document No.	Document Date	Promotion No.	Customer No.	Customer Name	Department Code	Customergroup Code	Amount	Amount (LCY)	Promotion %	Promotion Unit Price	Posting Date	Item No.
612	S-ORD101211	1/16/2025	PROM0011	10000	Adatum Corporation	SALES	SMALL	126.00	126.00	2.00	0.24	1/16/2025	1003
613	S-ORD101211	1/16/2025	PROM0012	10000	Adatum Corporation	SALES	SMALL	126.00	126.00	3.00	0.36	1/16/2025	1003

PROMOTION BALANCE RE-POSTING

- 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**.

General Ledger Entries Edit List Home Review Entries Actions Related Automate Fewer options

Find entries... Reverse Transaction... Correct Dimensions Entry

Posting Date	Document Type	Document No.	G/L Account No.	Description	Department Code	Customergroup Code	Amount (\$)	Bal. Account Type	Bal. Account No.
1/16/2025		PS-INV103272	10700	Direct Cost 10000 on 01/16/25	SALES	SMALL	-34.16	G/L Account	
1/16/2025		PS-INV103272	50100	Direct Cost 10000 on 01/16/25	SALES	SMALL	34.16	G/L Account	
1/16/2025	Invoice	PS-INV103272	40200	Order S-ORD101209	SALES	SMALL	-78.75	G/L Account	
1/16/2025	Invoice	PS-INV103272	10400	Order S-ORD101209	SALES	SMALL	78.75	G/L Account	
1/16/2025		PS-INV103272	40200	Income, Product Sales	SALES	SMALL	1.50	G/L Account	10940
1/16/2025		PS-INV103272	10940	Income, Product Sales	SALES	SMALL	-1.50	G/L Account	40200

