

## Creating Buy and Spend Type Promotions

There are several ways to implement special deals for your customers, aside from putting products on sale.

In this course, we will show you how to create both Buy and Spend type Promotion.

Then we'll use them on a sales order.

To make sure you're ready for this instruction, make sure you've watched the Training on Demand course called Creating Sale Price Promotions.

A Buy style Promotion lets you specify a list of products and the deal available when they're purchased.

A BOGO, or Buy One Get One sale, is an example of this type of Promotion.

To add one, open Selling Price Rules from the Inventory tab.

Set the View to Promotions and then click Add.

Choose a Branch and enter the Promotion code and Name.

The Name should clearly describe the deal offered.

This promotion is for Flex Glow paint. For every two gallons the customer purchases, they get a free roller.

Now, select the Promotion type from the dropdown list.

At the top of the list are the Buy x products from a list types.

Get selections include giving a product for free or for a price, awarding points, or giving a free gift card.

The Save option lets you enter a percentage or an amount that reduces the product price.

You can also specify a price for the products on the list.

For this promotion, we'll select Buy x products from a list and get product y free.

Enter the dates and times that this promotion is Valid.

Set the Manual line type to Promotion.

You may also Exclude customers based on their Price Profile or Loyalty Level.

The Promotion type selected determines which options appear on the Detail tab.

You enter the Details in 3 parts beginning with

the products that are eligible for the deal, the sale quantity required for the promotion, and the savings or Get portion.

To select the products, click Add.

You can choose items by specific Products, or by an entire Product or Sell Price Group.

Select Product.

Set the search parameters to Find the products desired.

Select the items and click OK.

Now enter the Buy quantity and if applicable, the UOM.

There is no quantity Limit on this promotion.

Finally, choose the products the customer can receive when their purchase meets the promotion requirements.

Enter the code or click the Get Product button to find the items.

Once you select the items, Close the window.

The system shows the number of products selected.

Use the associated drop-down to set the type of savings.

The options include: Free, for a set a price, or save a specified dollar amount or percentage.

For this example, we'll select Free.

When the Details are complete, click OK to save the Promotion.

It appears on the Selling Price Rules window.

Next, we'll create a Spend type Promotion, used to offer savings based on the amount of the sale.

We have a new Selling Price Rule with the Code and Name entered.

There are several Spend type Promotion options available.

Each has a Spend up to or x where you set the sales amount that needs to meet. For these, you will not select products that the customer must buy to qualify for the promotion.

Each has an option of a percentage or amount to be saved, products given for free or a price, or points to be awarded.

Here, we select 'Spend x and save a percentage or an amount'.

Enter a Valid from and to value and set the Manual line type to Promotion.

On the Detail tab, set the dollar amount that the customer has to spend to be eligible for the deal.

Then, indicate the Save amount and choose whether the value is a Percent or dollar amount.

If there is a Maximum dollar savings amount, enter that as well.

When the Details are complete, click OK to save and close the Promotion.

Let's now take a look at how these two Promotions work on a sales order.

Here we have a new order with

a paint product on Promotion entered.

Next, we add a product being offered in the deal.

The system shows the product added to the sale with a Manual line showing the Promotion Code and Description.

The deal offers the roller for free when the customer buys two gallons of paint, therefore the full price of the roller is deducted from the sale.

We'll add another product to the sale.

The Goods total is now over \$250 causing the system to apply the 10 percent discount to the sale.

BisTrack shows the total of the two Promotions in the footer area.

Creative sales promotions are another way to get Customers into your store buying more products!

We showed you how to add both Buy and Spend Promotion Types and then demonstrated how they appear on a sales order.

You should now be able to create your own sales events using these innovative options.

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