



Managing Promotions

Microsoft Dynamics® RMS

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Promotions are a great way to reduce overstock, of course. But promotions can accomplish much more. At the same time that promotions help move particular items, they promote your store, promote customer visits, and promote customer relationships.

All these goals become even more important during recessions and other slow times. Customers have less money to spend and are much more careful about spending it, so it's essential that retailers take the initiative to know their customers and provide the value they need and are searching for. Promotions can help.

In this article, we'll take a look at how easy it is to set up and manage various promotions in Microsoft Dynamics RMS.

Put items on sale

You might be getting ready for a customer appreciation day or want to promote items that customers are looking for, and you want to set up all your sale prices days in advance. Before you specify the sale prices of the items, decide if you want to specify a simple start date and end date for the sale, or set up a weekly schedule. For example, you could put the items on sale every Saturday and Sunday. (You can also create a schedule that blocks the sale of items for specific days or times.)

When customers purchase an item on sale, they pay the sale price unless they have a discount that specifies a lower price. At the end of the sale, the sale price returns to its normal price.

You can change the price at the point-of-sale, provided that the cashier has access rights to override the price. To ensure that the cashier does not sell an item below its lowest price, you can define a price range for the item. Store Operations displays a message when the cashier changes the item's price to below its lowest allowable price.

You can put individual items on sale or use the Inventory Wizard to mark down multiple items at once.

Define a weekly schedule

1. On the **Database** menu, click **Schedules**.
2. Click **New**.
3. In the **Description** box, enter a name for the schedule; for example, Happy Hour or Lunch Special.
4. In the **Time Increments** box, select an increment of 15 minutes, 30 minutes, or 1 hour. The grid will vary depending on the selected increment.
5. On the schedule grid, click or drag to select the time periods you want to schedule. For example, if you want a sale price to be in effect from 10:00 A.M. to 6:00 P.M. on Mondays, drag to select the periods in the rows from **10:00 AM – 11:00 AM** to **5:00 PM - 6:00 PM** in the **Monday** column.

Tip

To select all the periods for an entire column or row, click or drag the column or row headings.

6. Click **Set**. Store Operations will highlight the periods in red to show that they are part of the weekly schedule.

Note

To clear a time, select it and click **Clear**.

7. When you finish defining the weekly schedule, click **OK** to save the changes.
8. Specify the items you want to put on sale and their sale prices. (See the following procedures.)

Put a single item on sale

1. On the **Database** menu in Store Operations Manager, click **Items**.
2. Select the item whose sale price you want to define and click **Properties**.
3. On the **Pricing** tab, under **Sale Pricing**, select the **This item is on sale** check box.
4. In the **Sale Price** box, enter the sale price.
5. Select either **This sale is in effect for a specific period** or **This sale is in effect according to a schedule**, and then define the start and end dates or select a schedule.
6. If you want to define a price range for the item, enter the range in the **Lower bound** and **Upper bound** boxes.

Put multiple items on sale

1. On the **Wizards** menu, click **Inventory Wizard**.
2. Click **Next** to display the **Select Inventory Task** page.
3. In the **Inventory tasks** box, select **Task 110: Change Item Prices**, and then click **Next**.
4. Select the items you want to put on sale, and then click **Next**.
5. Select the price change method and price to be changed. In the **Start date** and **End date** boxes, select the start and end dates, and then click **Next**.

Note

If you selected **Add Items Manually** on the previous wizard page, some of the controls on this page may be disabled.

6. If you want to round your updated prices to retail values, select the **Perform Price Rounding** check box, and then define the rounding rules. If you have never defined rounding rules, click the corresponding check box under **Rounding Rules** to set up the rounding structure. To continue, click **Next**.
7. Click **Finish** to display the **Inventory Wizard Workpad**.
8. If all the information is correct, click **Commit** to apply the changes to your database. If you selected the **Add Items Manually** option, you need to enter the applicable items before you can commit them. If you edit the information, either enter the data in the appropriate box or right-click your mouse to use additional commands. To cancel all the changes, click **Cancel**.

Provide a gift with purchase

You can assign a promotional or gift item, called a “tag along” item, to items in your database. This way, when customers purchase a particular item, Store Operations automatically includes the gift item in the sale. You can also designate the quantity of the gift item you want to give away with the purchase.

Before you can provide a gift with purchase, you must first designate an item as a gift and then assign it as a tag along item to the items you want.

For example, assume that you want to give away a football whenever a customer purchases an item whose price is more than \$50.00. You would then need to assign the football as a tag along item to each item whose price is higher than \$50.00.

 **Note**

If necessary, the cashier can delete the gift item at the register.

Designate an item as a gift

1. On the **Database** menu, click **Items**.
2. Click **New**, click **Standard**, and then click **OK**.
3. On the **General** tab, enter the item information, including the item lookup code, description, and department and category.
4. In the **Item Type** box, select an item type. If you want to track this promotional item, select **Standard**. If you do not want to track the item, select **Non-Inventory**.
5. Use the other available tabs to enter the other information you want.
6. Click the **Pricing** tab.
7. Because you plan to give away this item at no cost to the customer, confirm that there is zero (\$0.00) in the **Price** box.

 **Tip**

To improve tracking the markdown of the gift item in reports and for tax purposes, use a discount or sale price, instead of simply setting the price to zero.

8. Follow the procedure below to assign this gift item to the items you want.

Assign the gift to an item

1. On the **Database** menu, click **Items**.
2. Select the item you want to assign the gift to, and then click **Properties**.
3. Click the **Special** tab.
4. In the **Tag along item** box, click the **Browse** button to select the gift item. Store Operations will display the gift item's lookup code in the **Tag along item** box.

To clear the **Tag along item** box, click the **Delete** button.

5. In the **Quantity** box, enter the number of gift items you want to include with the item.
Now, every time a customer purchases this item, Store Operations automatically includes the gift item in the sale.

Set up discount schedules

Store Operations provides two types of discounts:

- Mix and Match – customers receive a discount when they buy a quantity of similar items.
- Buy X, Get Y for Z – customers receive a number of items free or at a discounted price when they buy a certain quantity of those items at the regular price.

When a discount is assigned to an item, the item's price is automatically discounted when that item is added to a sales transaction and the conditions of the discount are met. For example, if you set up a Buy 2, Get 1 Free discount and assign it to an item, the price of the third such item added to the transaction will automatically be set to zero.

Define a discount

1. On the **Database** menu, click **Discounts**.
2. Click **New**.
3. In the **Description** box, enter a name for the discount.
4. Select the type of discount.
5. Set up the discount pricing schedule or enter the discount settings. For more information, click **Help** in the **Discount** window.
6. Click **OK**.

Assign a discount to an item

1. On the **Database** menu, click **Items**.
2. Select the item you want to discount, and then click **Properties**.
3. Click the **Discounts** tab.
4. Select the type of discount, and then select the discount in the **Discount scheme** box.
5. Click **OK**.