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OPEN LABS BUSINESS SOLUTIONS

SALES PROMOTIONS

User's Manual - VERSION 0.1



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Installation

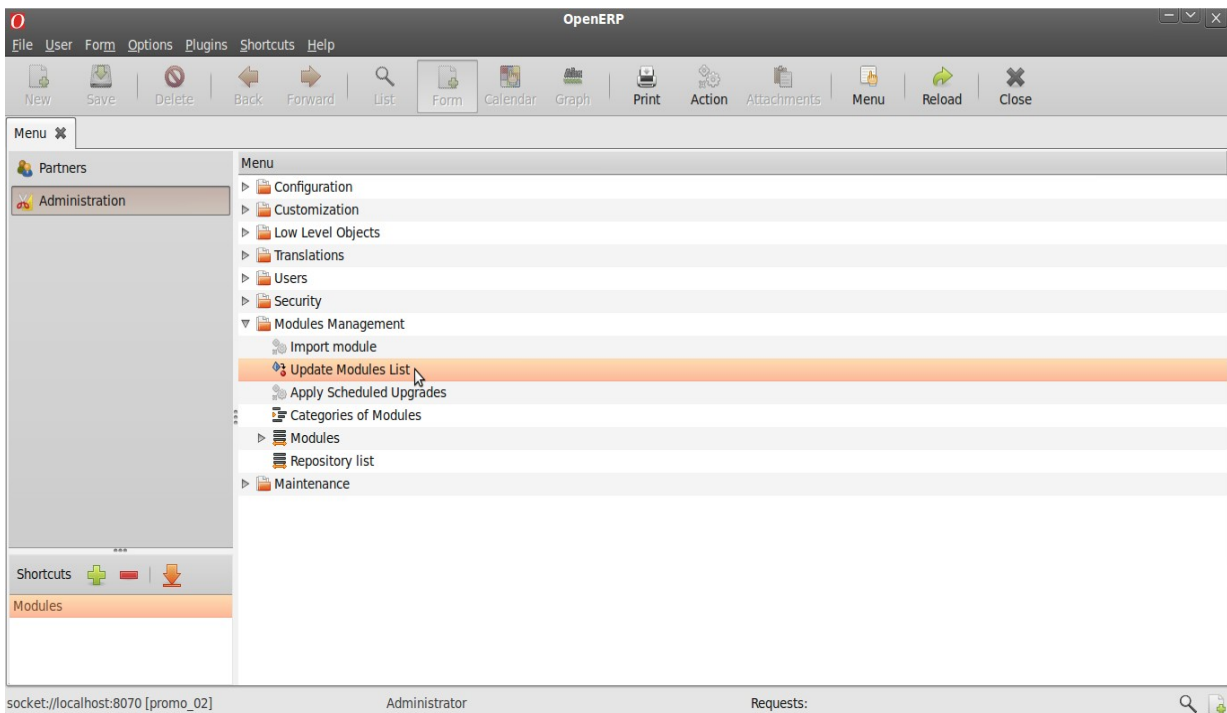


Illustration 1: Menu to Module Installation

- Copy the module to the Python Path of Open ERP.
- Goto Administration >> Modules and Search for the module as shown.

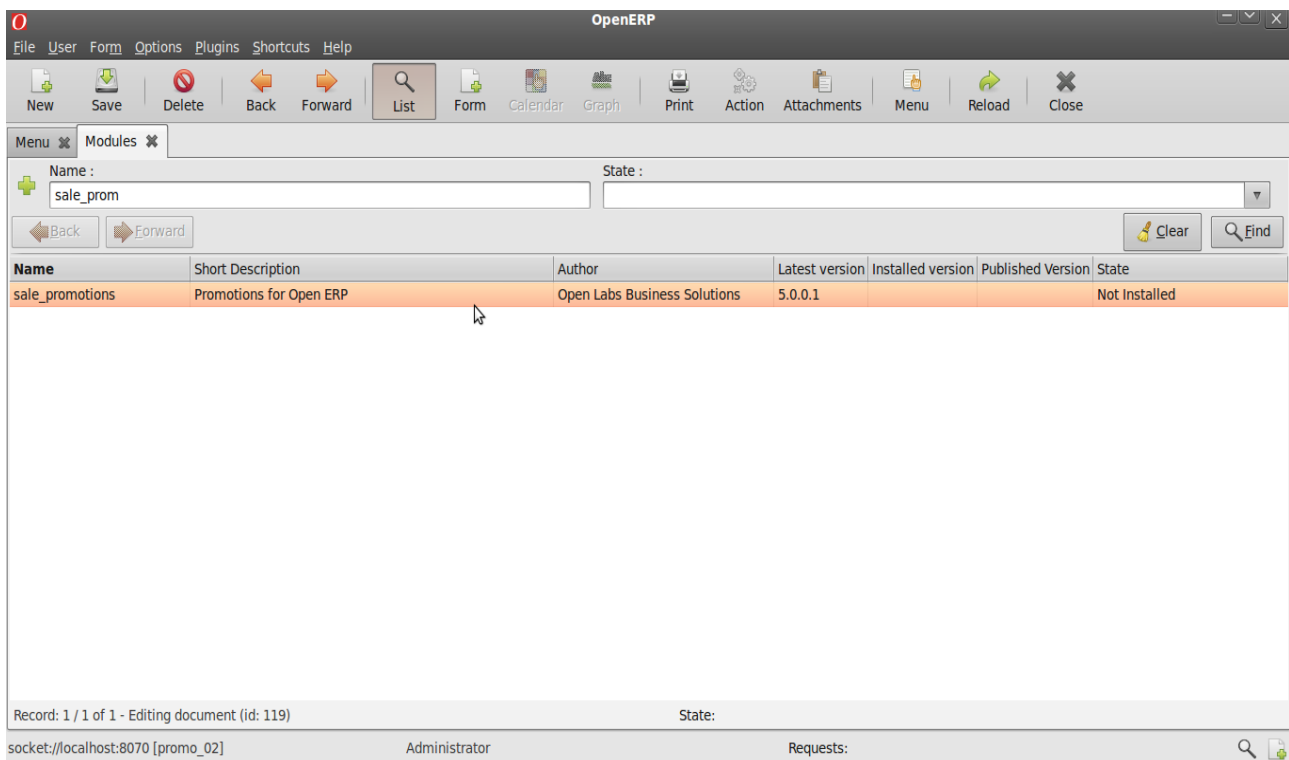


Illustration 2: Module selection

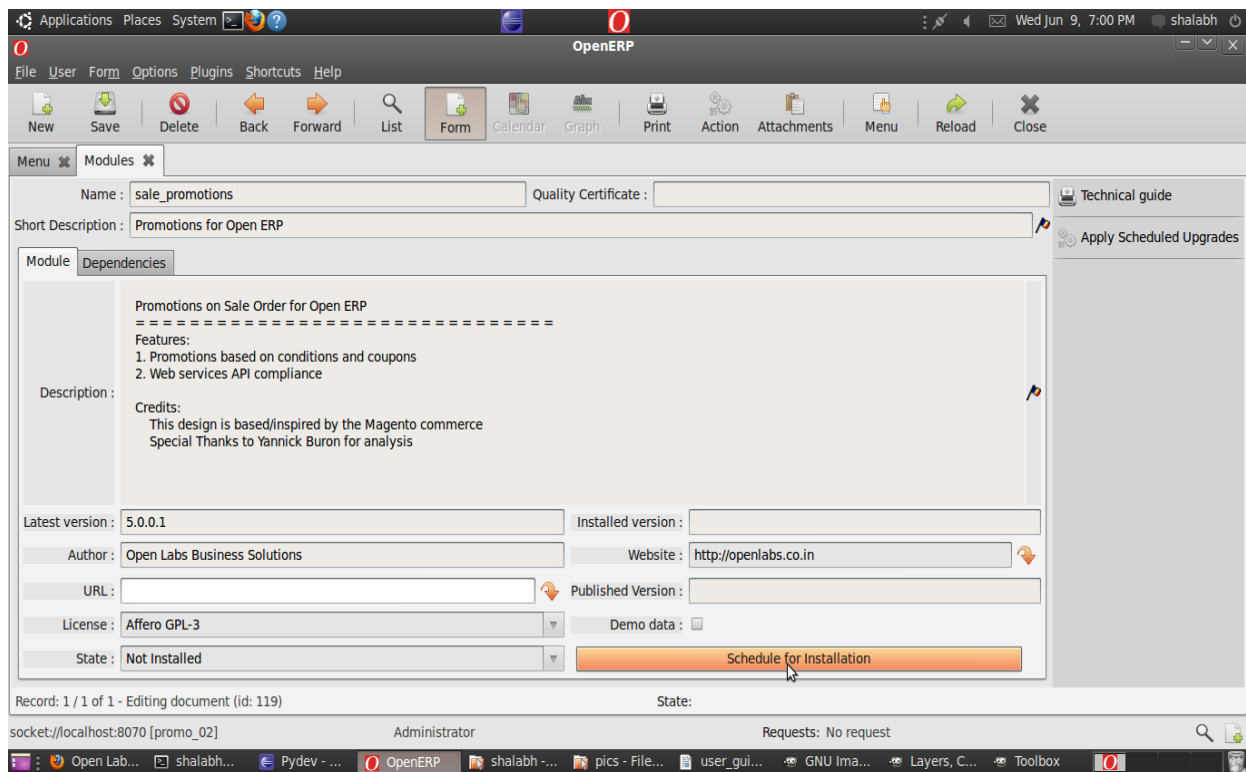


Illustration 3: Installing the module

Install the module by clicking 'Schedule for Installation'

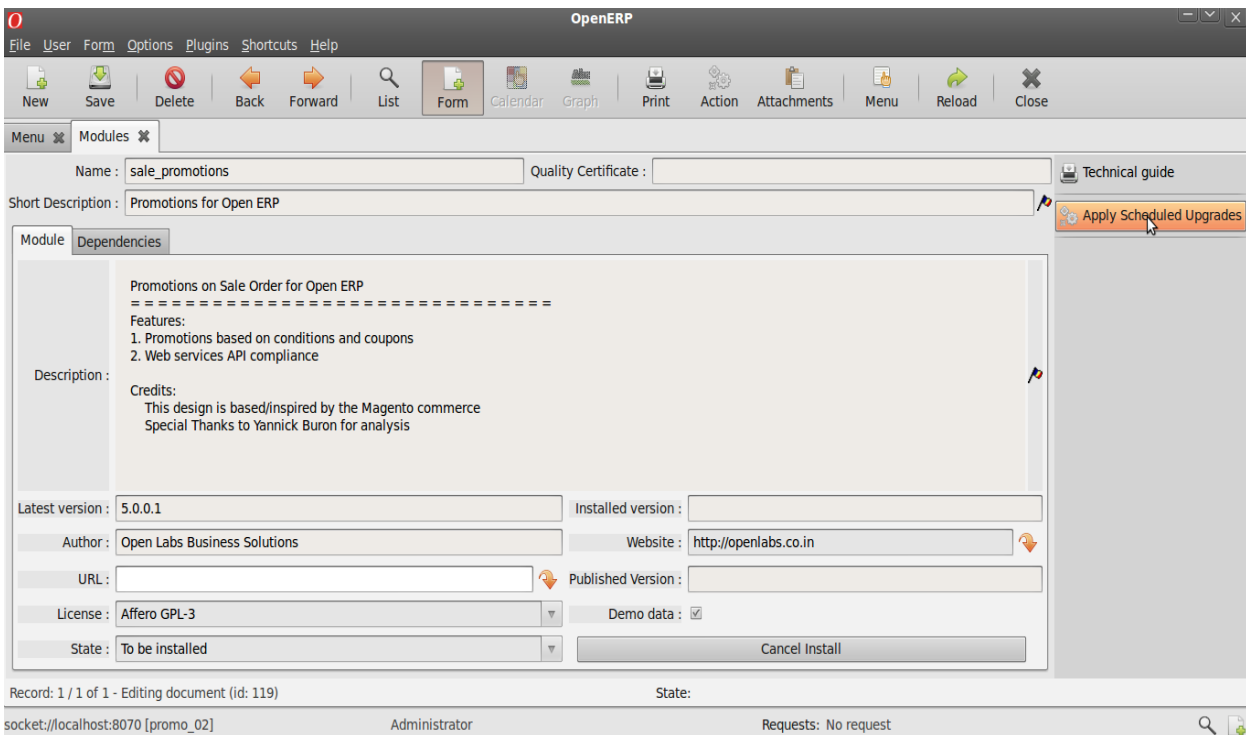


Illustration 4: Applying the new module

Click on 'Apply Scheduled Upgrades' to perform actual Installation.

The module with the dependency module (sale) will be installed. If this module is already installed, only this module will be installed.

Dealing with Promotions

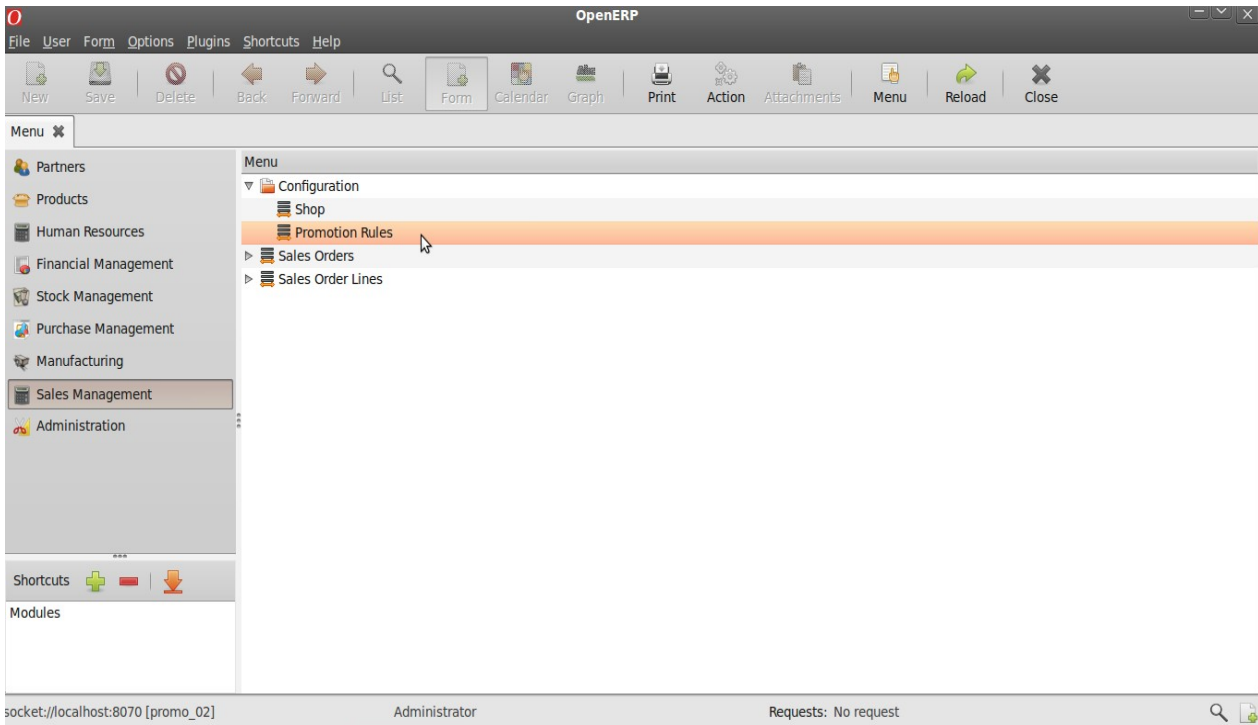


Illustration 5: Reaching Promotions

Goto Sales Management >> Configuration >> Promotion Rules

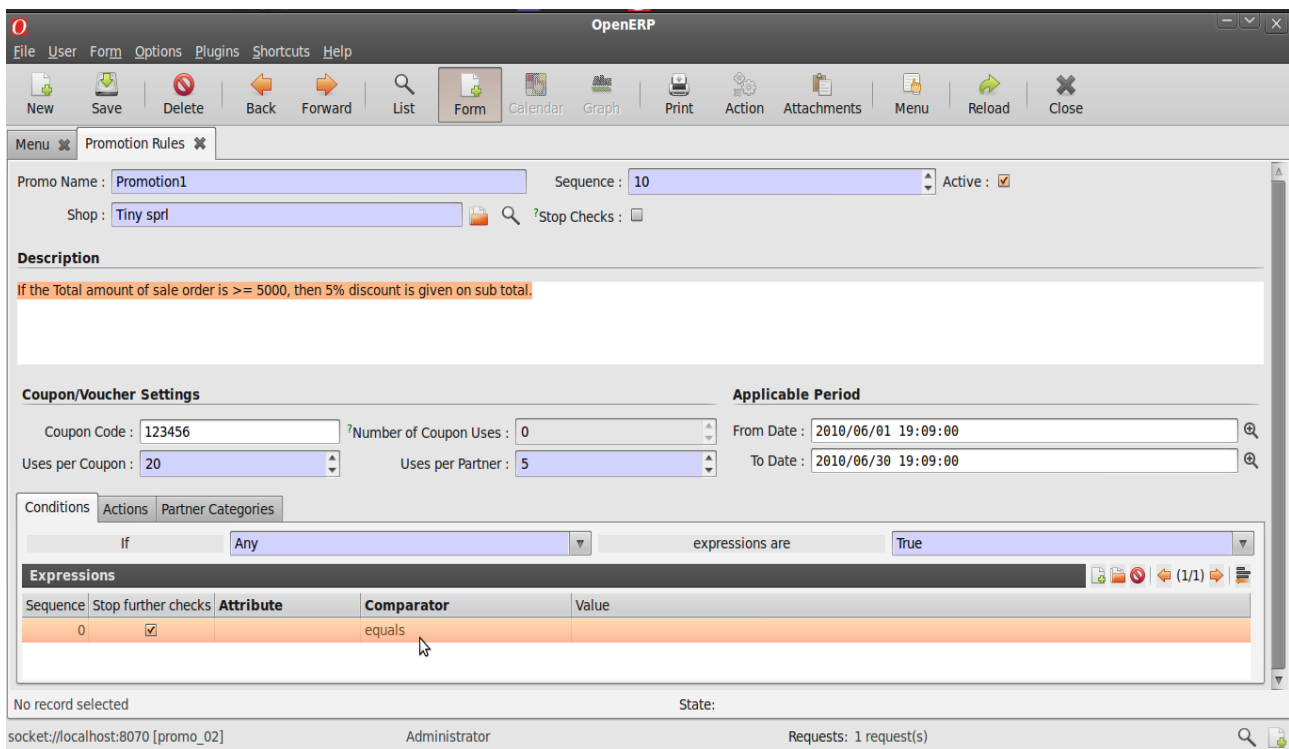


Illustration 6: Creating a New Promotion

Description of fields :

Sequence : This field ensures the order in which the promotions will act upon a sale order if more than one promotion acts on a sale order.

Active : Only active promotions can act on a sale order.

Stop Checks : If more than one promotion act on a sale order, then the promotion with this field ticked will cause further promotions from being acted upon.

From Date and End Date : Any promotion will act upon a sale order if its applicable period is valid.

Coupon Code : This is a unique code of the promotion coupon which can be used to directly apply a promotion to a sale order.

Uses per Coupon : This field restricts the maximum number of times a coupon can be used .

Uses per Partner : This field restricts the maximum number of times a coupon can be used by a partner.

Number of Coupon Uses : This field indicates the number of times the coupon has been used till now.

Now we will try to create a promotion with the aim as described in **Description**.

Creating Expressions

Enter all the details here as per the requirements.

Here a demonstration of how expressions and actions are designed will be given.

Illustration 7: Choosing expression validity.

Above illustration shows how the list of expressions below can be used. Here either all the the expressions can be applied or either any of them. User can also choose between making the expressions True or False for actions to act on them.

Description of fields :

Sequence : This field ensures the order in which the expressions will act execute.

Stop Further Checks : If more than one expression is present, then the expression with this field ticked will stop the execution of any expression after it in sequence.

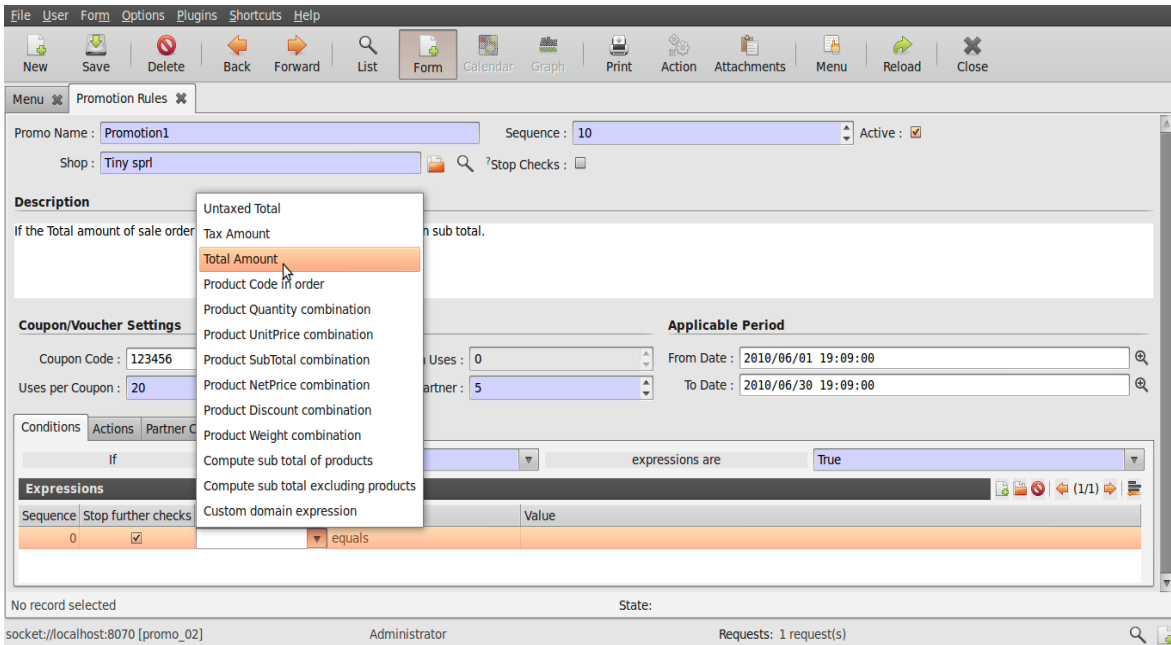


Illustration 8: Choosing an attribute.

An attribute is chosen above which will be the criteria for comparison be based.

User has the flexibility of choosing between various options available which can be as simple as Total Amount or Tax Amount and can be a combination of various attributes like Product Quantity Combination etc. Experienced User can also have their own Custom Domain Expression.

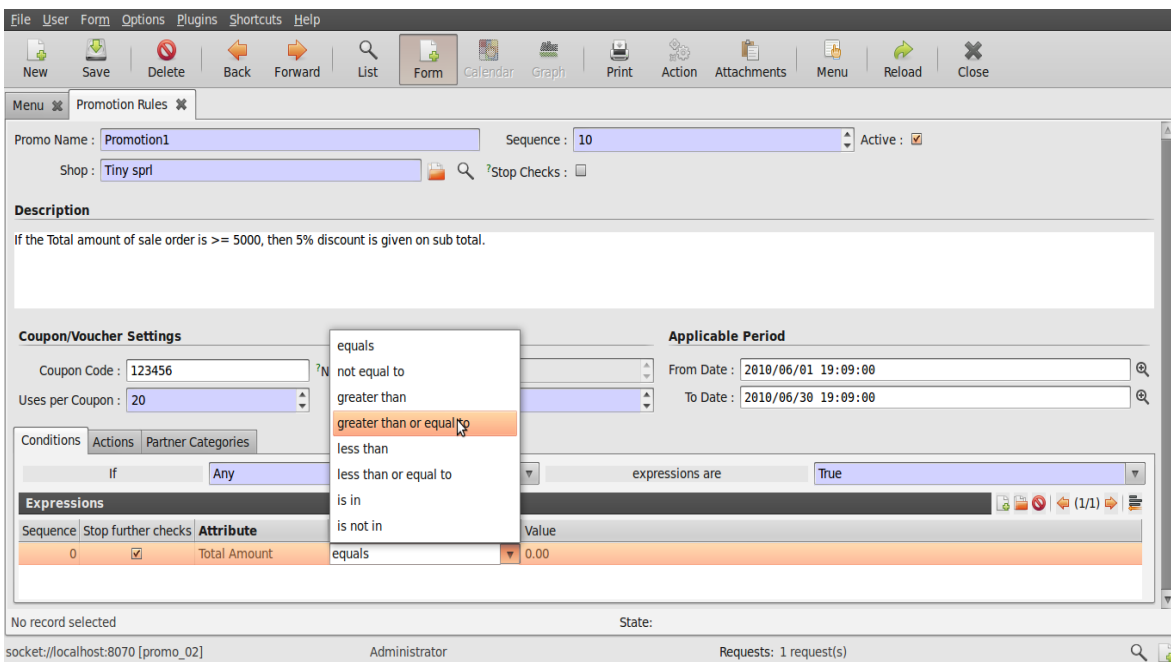


Illustration 9: Choosing an comparator.

The figure above shows how a comparator is chosen. These are normal mathematical and list operators and work as their name indicates. This will compare the value of attribute from sale order with the value defined here as shown in the next illustration.

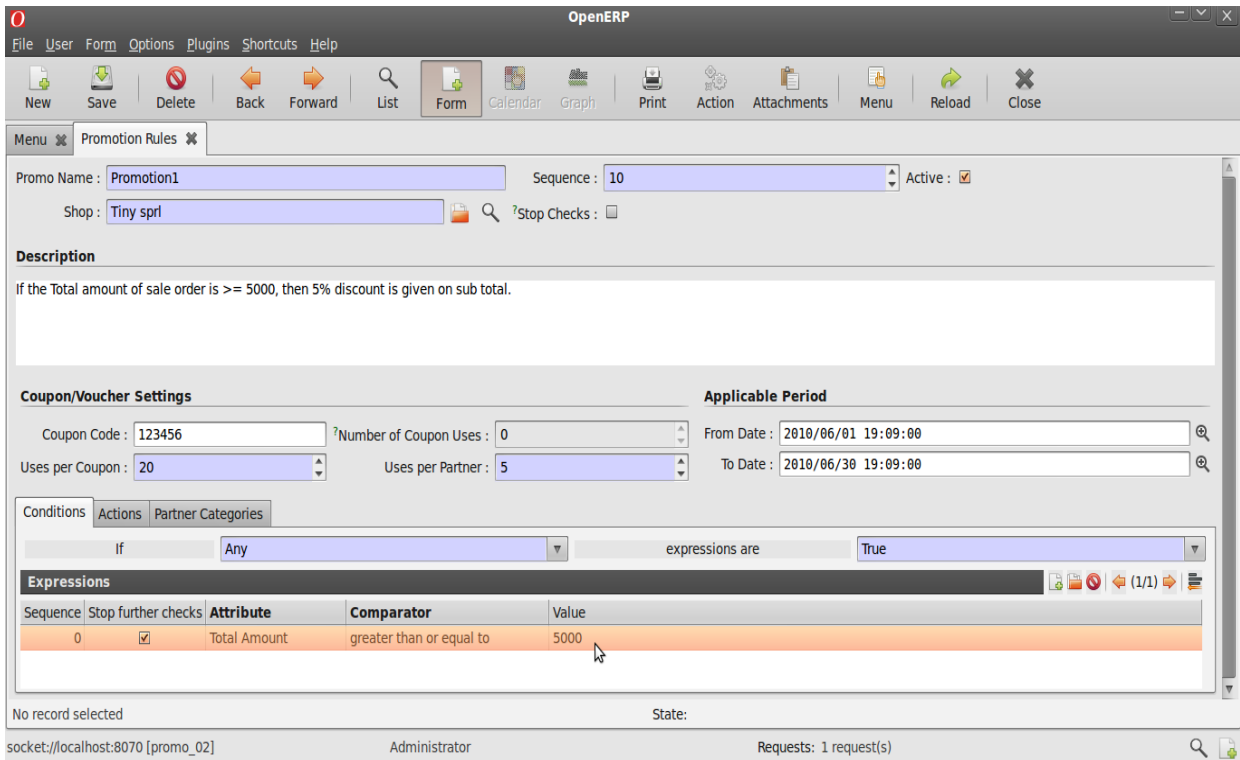


Illustration 10: Choosing a value for comparison.

In the Value field, user must enter the value that he/she wishes to be used for comparison. Sometime the this field might contain a value 'product_code'. In this case, the product_code has to be replaced by the actual product of a product eg. 'product_code' >> 'PC1'.

Defining Actions

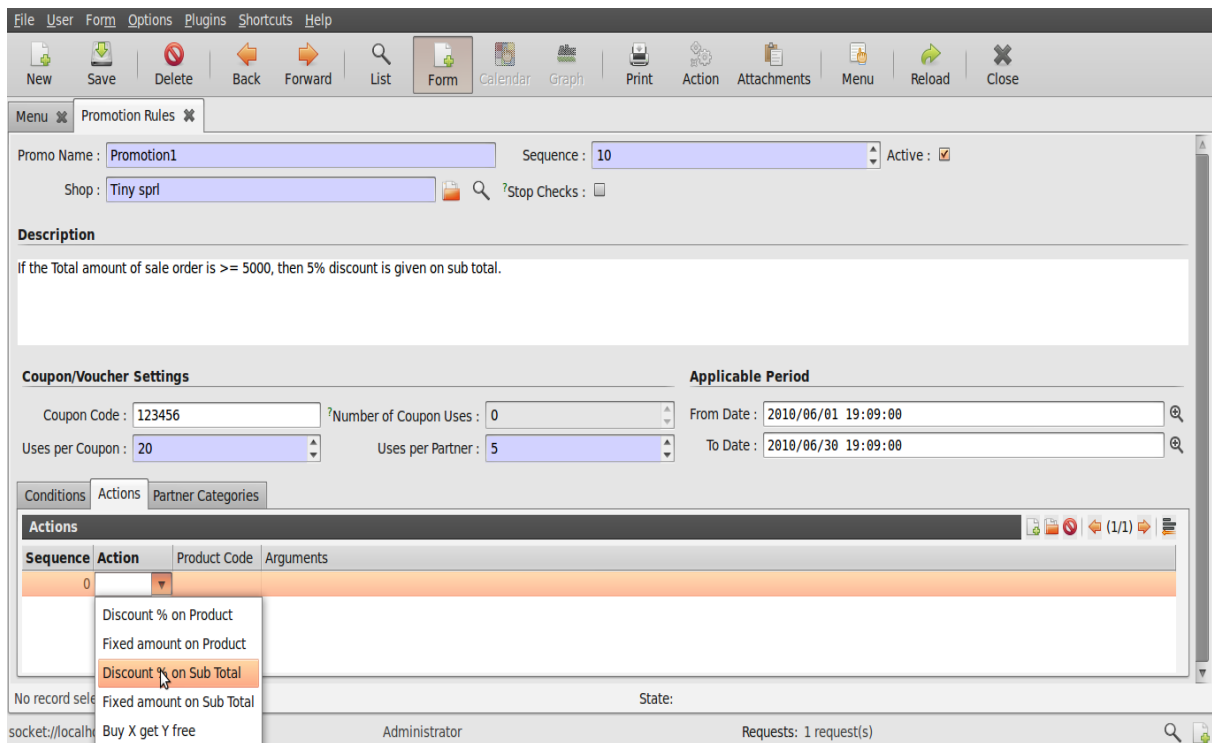


Illustration 11: Choosing an action.

Actions can be chosen from the list that have to be performed when sale order attributes meet an expression.

Actions can be compared to various promotional offers that are provided to customers. These are simple like giving some discount or giving a fixed amount off on a product or sub total or simply giving away some product free with another product.

Arguments can be set as required. Actions will be performed according to these arguments.

The screenshot shows the OpenERP interface for configuring a promotion rule. The 'Promo Name' is 'Promotion1', 'Sequence' is '10', and 'Active' is checked. The 'Shop' is 'Tiny sprl'. The description states: 'If the Total amount of sale order is >= 5000, then 5% discount is given on sub total.' Under 'Coupon/Voucher Settings', the 'Coupon Code' is '123456', 'Number of Coupon Uses' is '0', 'Uses per Coupon' is '20', and 'Uses per Partner' is '5'. The 'Applicable Period' is from '2010/06/01 19:09:00' to '2010/06/30 19:09:00'. The 'Actions' table is as follows:

Sequence	Action	Product Code	Arguments
0	Discount % o		5

Illustration 12: Setting arguments.

Above the product code field is useful when some action is chosen to be acted on a product specifically. Here product needs to be entered as explained on page 8. An example is shown below.

The screenshot shows the OpenERP interface for configuring a promotion rule. The 'Promo Name' is 'Promotion1', 'Sequence' is '10', and 'Active' is checked. The 'Shop' is 'Tiny sprl'. The description states: 'If the Total amount of sale order is >= 5000, then 5% discount is given on sub total.' Under 'Coupon/Voucher Settings', the 'Coupon Code' is '123456', 'Number of Coupon Uses' is '0', 'Uses per Coupon' is '20', and 'Uses per Partner' is '5'. The 'Applicable Period' is from '2010/06/01 19:09:00' to '2010/06/30 19:09:00'. The 'Actions' table is as follows:

Sequence	Action	Product Code	Arguments
0	Discount % on Product	'product_code'	0.00

Illustration 13: Example of an action related to product. Here product_code needs to be replaced with required code of a product.

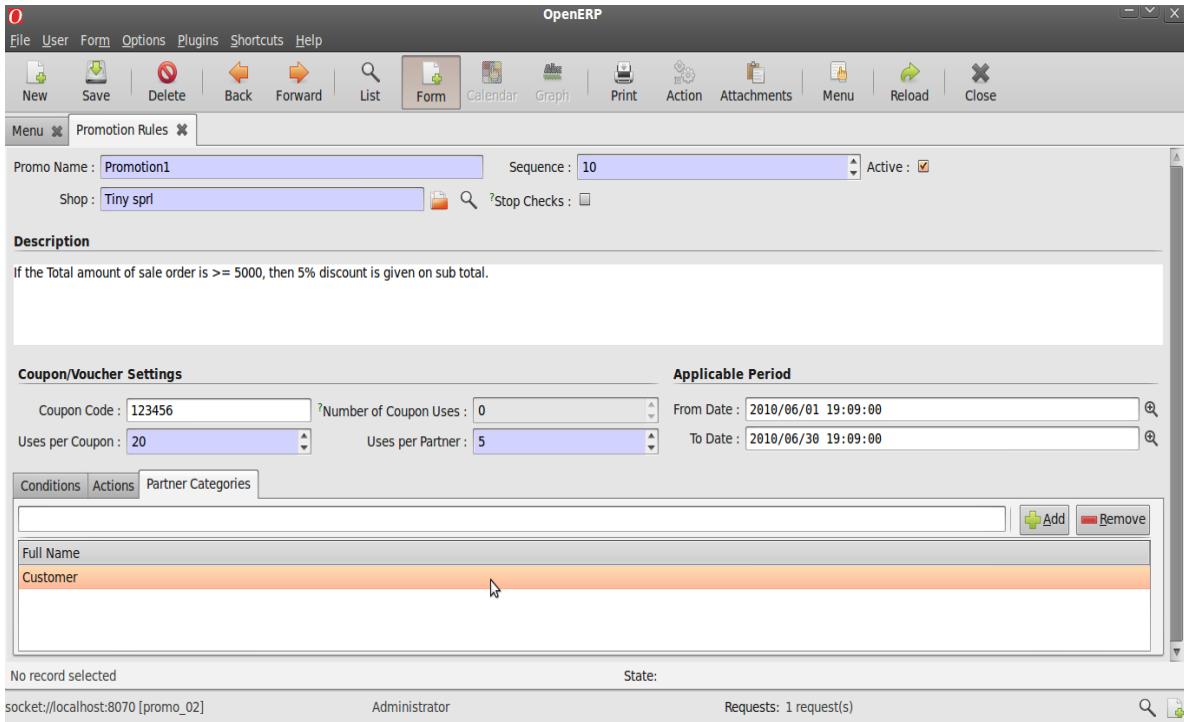


Illustration 14: Setting Partner Categories.

Any promotion will be applicable to any sales order if the partner's category there matches the Partner Category/Categories chosen here.

Promotions work on sales orders

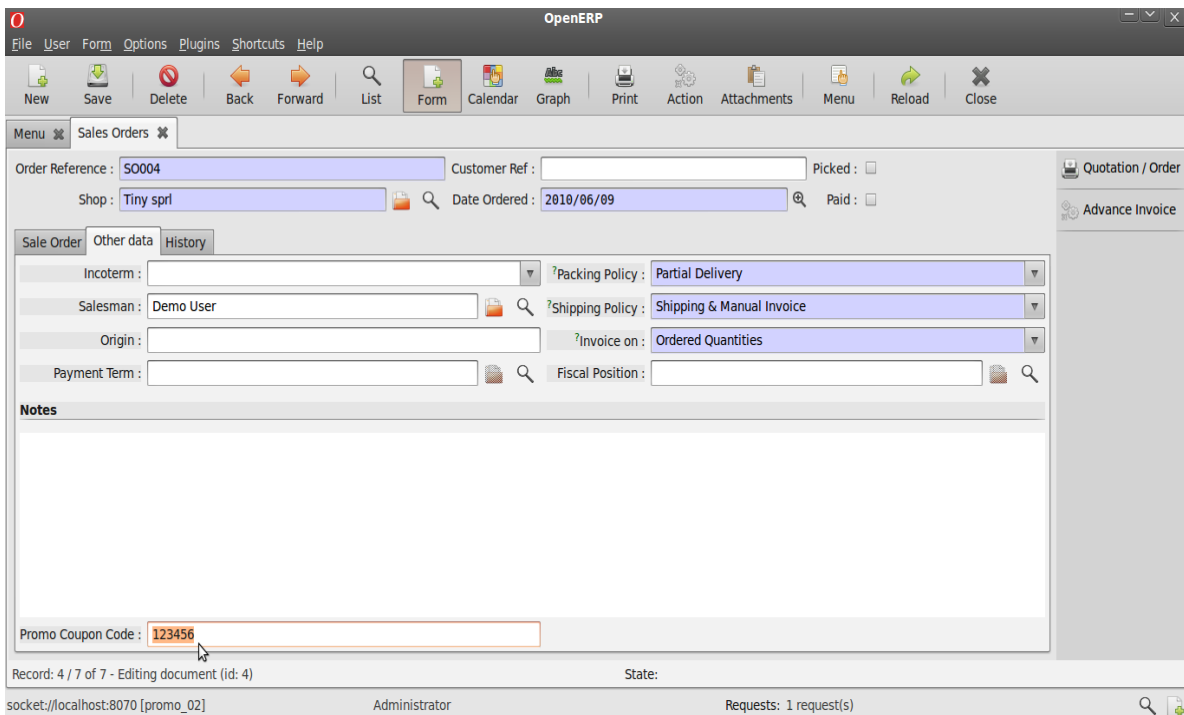


Illustration 15: Setting coupon code to be applied on sales order.

A coupon code can be added to a sale order in the Other Data Tab as shown above.

The screenshot shows the OpenERP interface for a Sales Order. The order reference is SO004, and the date ordered is 2018/06/09. The customer is Ecole de Commerce de Liege. The sales order lines table is as follows:

Description	Qty	UoM	Discount (%)	Unit Price	Net Price	Subtotal
[PC1] Basic PC	2.00	PCE	0.00	450.00	450.00	900.00
[PC3] Medium PC	5.00	PCE	0.00	900.00	900.00	4,500.00
Promotion1	1.00	PCE	0.00	-270.00	-270.00	-270.00

Below the table, the Untaxed Amount is 5130.00, Taxes are 0.00, and the Total is 5130.00. The 'Apply Promotions' button is highlighted, and the order state is 'Quotation'.

Illustration 16: Applying Promotions.

Promotions can be applied to a sale order by clicking on the Apply promotion Button.

Note that a new line has been added showing the discount done as per the promotion defined in illustrations above.

About Open Labs Business Solutions

Open Labs Business Solutions is a global Information Technology and Management Consulting company that helps small and medium businesses achieve high efficiency with cost effective business solutions. With customers and partners in 4 continents, Open Labs designs and delivers technology-enabled innovative business solutions that address the needs of small and medium enterprises. Open Labs provides end to end solutions to businesses using a range of Free and Open Source Solutions (FOSS) implemented by a team of highly skilled workforce comprising of domain and business experts.

The software division of Open Labs is a specialized division for Rapid Application Development of business applications with a proven expertise in Open ERP (and Open Object), Tryton and Django.

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