Discount & Free Item Group

Module Guide: Discount And Free Item Group

Module Location

Sales > Sales Trade Agreement > Discount And Free Item Group

Module Objective

The **Discount And Free Item Group** module is a flexible promotional tool. Its purpose is to create a promotional program that combines a percentage discount with a free product gift, which becomes applicable if the total purchase reaches a specific nominal value.

1. Main View (Group List)

The main page of this module displays a list of all the promotional programs that have been created.



View Explanation

This page is for viewing and managing all existing promotional programs.

- **Filter**: You can search for a specific program using the search bar based on the **Group Code**.

- **Group List**: The table below will display a summary of each program, with columns for **Group Code**, **Group Name**, **Last Update**, and **Updated By**.

Button Functions

- **New**: The primary button to create a new promotional program.
- **Delete**: To delete a selected program.

2. Steps to Create a New Program

Step 1: Create a New Program

From the Main View, click the **New** button to open the **Add Discount And Free Item Group** form. 

Step 2: Fill in General Program Information

Fill in all the general information at the top of the form:

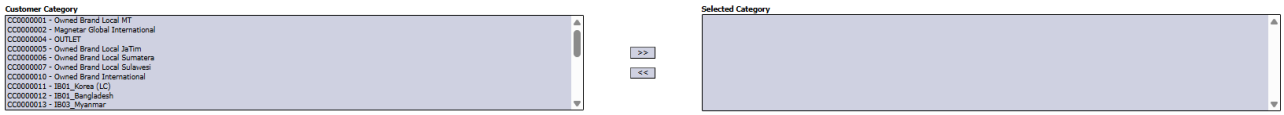
- **Group Code & Group Name**: Provide a unique code and a clear name for your promotional program.



- **Period**: Define the start and end dates of the promotion period (e.g., August 5, 2025).



- **Customer Category**: Select the target customers for this promotion by moving the relevant category from the left box to the **Selected Category** box on the right.



Step 3: Define the Terms and Conditions

- **Total SO Amount**: Enter the minimum total purchase value on a Sales Order that the customer must reach to get this promotion.



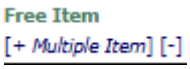
- **Discount**: Enter the size of the discount in percentage **(%)** that will be given if the **Total SO Amount** condition is met.



Step 4: Define the Free Product

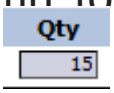
In the **Free Item** detail table, list the product(s) that will be given as a free gift:

1. Click **[+] Multiple Item [-]** to add a row.



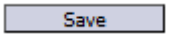
2. Select the product from the item list that appears (as seen in the List of Item image).

3. Fill in the **Qty** column to determine the quantity of the free product to be given.



Step 5: Save the Program

After all details are filled in, click the **Save** button in the bottom-left section to save and activate this promotional program.



Tips & Important Notes

- This module is very effective for encouraging customers to increase their transaction value (**upselling**) to reach the **Total SO Amount** threshold.

- Ensure you select the correct **Customer Category** so that the promotion only applies to the customer segment you are targeting.

- Once this program is active, the system will **automatically apply the discount and add the free product** to a Sales Order if the customer and their total purchase meet the conditions.

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