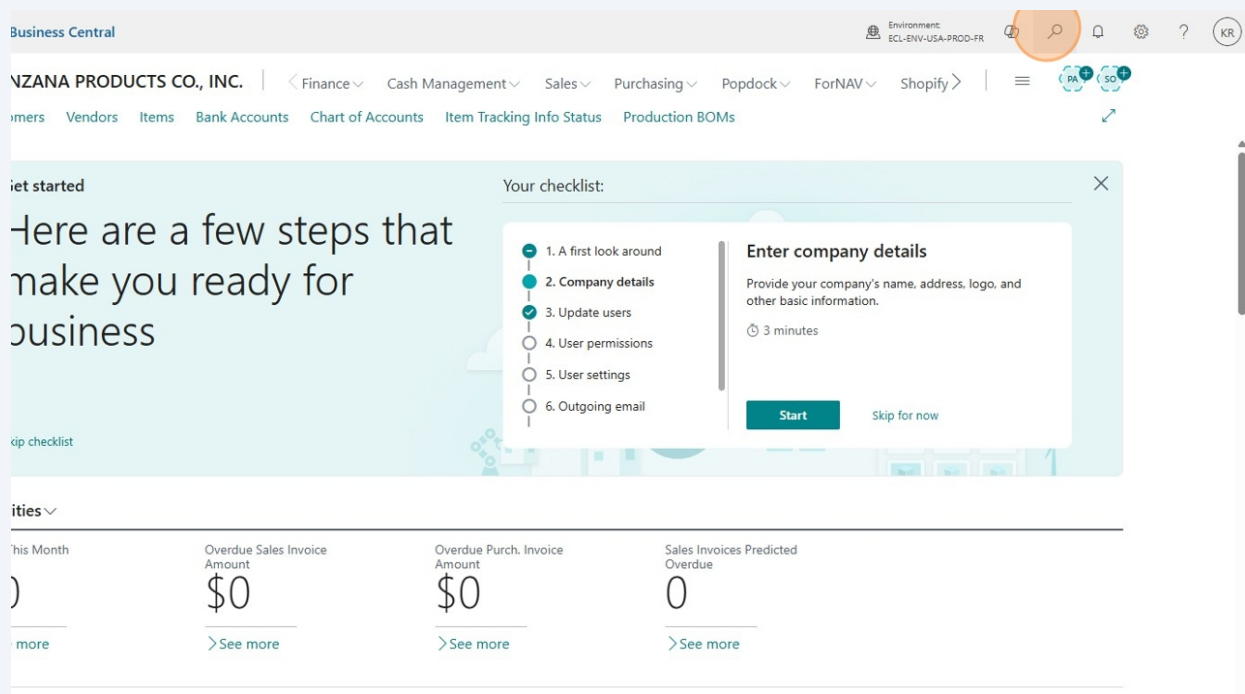


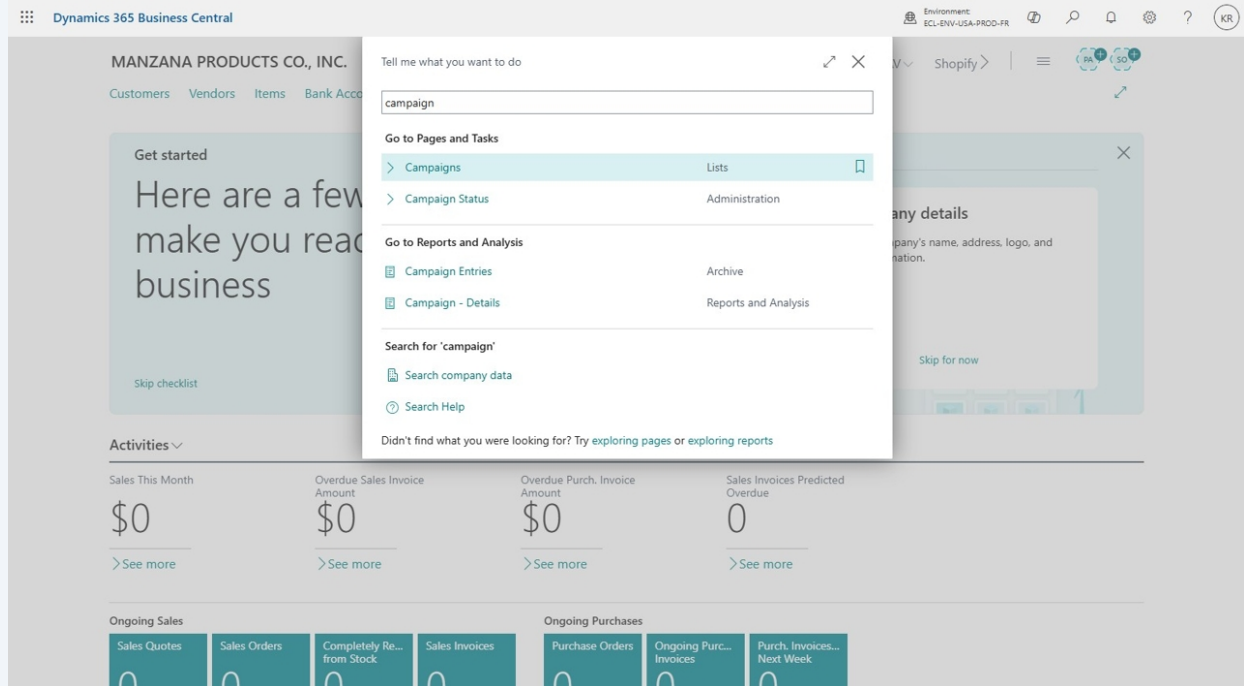
How to create Promo's in BC

This guide provides a step-by-step process for creating promotional campaigns in Business Central. By following the detailed instructions, users can efficiently set up campaigns, manage contacts, and apply discounts, ultimately streamlining their promotional activities.

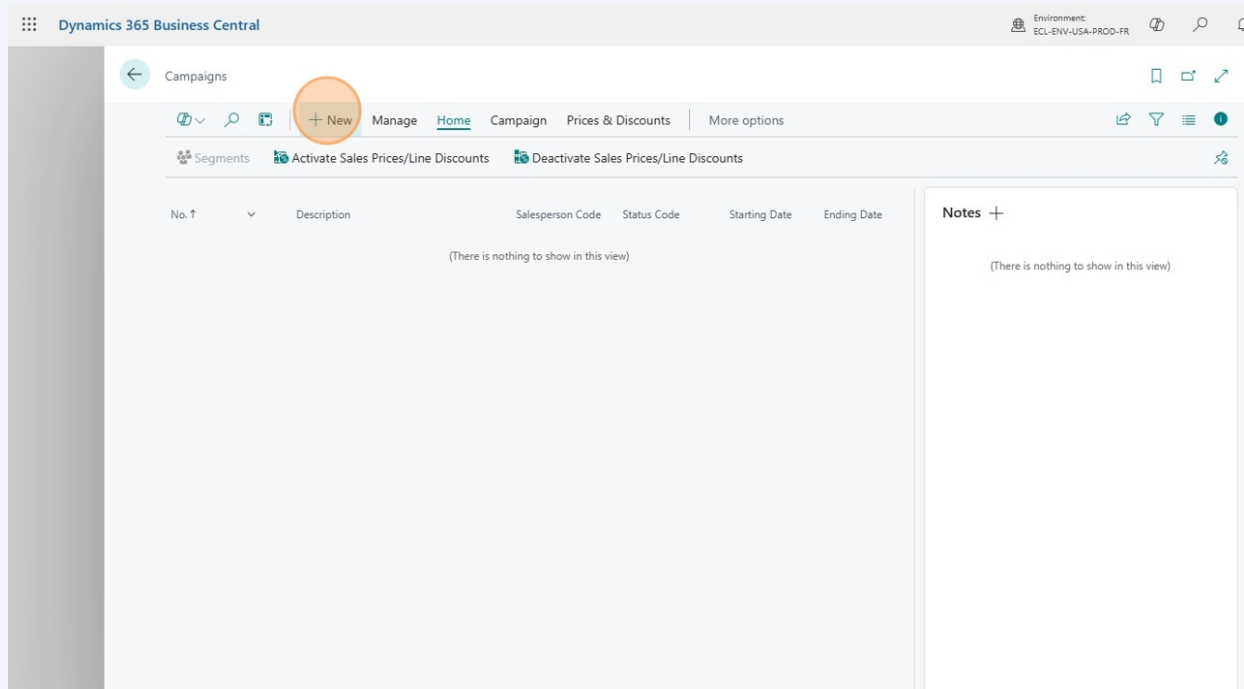
1 To create a new promo in BC, search "campaign"



2 Type "campaign" and click on the link



3 Click "New"



4 In this example we are creating the promo for Kehe # 7920

7903		11/24/2025	12/26/2025		
Item #	ITEM DESCRIPTION	Case Pack	Ounces	Case Off	Invoice
100534	ORGANIC HONEYCRISP APPLE JUICE	24	10	\$5.72	
100843	ORGANIC APPLE SAUCE CUP 4	12	16	\$5.31	
100844	ORGANIC APPLE CINNAMON SAUCE CUP 4	12	16	\$5.31	
100898	ORGANIC APPLE CINNAMON SAUCE POUCH 4	6	12.8	\$3.34	
100910	ORGANIC APPLE SAUCE + PROBIOTIC POUCH 4	6	12.8	\$3.74	
100911	ORGANIC APPLE STRAWBERRY SAUCE + PROBIOTIC	6	12.8	\$3.74	
101900	ORGANIC APPLE MANGO SWEET POTATO APRICOT F	6	12.8	\$3.83	
102247	ORGANIC APPLE SAUCE POUCH 4	6	12.8	\$3.34	
102264	ORGANIC HONEYCRISP APPLE SAUCE POUCH 4	6	12.8	\$3.34	
102600	ORGANIC APPLE SAUCE POUCH 12	4	38.4	\$4.41	
102601	ORGANIC APPLE CINNAMON SAUCE POUCH 12	4	38.4	\$4.41	
103144	ORGANIC HONEYCRISP SAUCE CUP	12	24	\$7.44	
7920- Kehe Book 2 2026 OI		12/29/2025	1/30/2026		
100539	NCOAST M.O.B JCE 6/32OZ	Juice	6-32 OZ	\$4.50	
100540	NCOAST M.O.B CDR 6/32OZ	Juice	6-32 OZ	\$4.50	
100542	NCOAST M.O.HC JCE 6/32OZ	Juice	6-32 OZ	\$4.50	
100544	NCOAST M.O.G JCE 6/32OZ	Juice	6-32 OZ	\$3.72	
7922- Kehe Book 4 2026 OI		2/23/2026	3/27/2026		
100539	NCOAST M.O.B JCE 6/32OZ	Juice	6-32 OZ	4.5	
100540	NCOAST M.O.B CDR 6/32OZ	Juice	6-32 OZ	4.5	
100542	NCOAST M.O.HC JCE 6/32OZ	Juice	6-32 OZ	4.5	
100544	NCOAST M.O.G JCE 6/32OZ	Juice	6-32 OZ	3.72	

5 Type "KEHE7920" as the code and description, to reference later.

6 Add the code in the code field, in this example it is KEHE7920.

Dynamics 365 Business Central

Environment: ECL-ENV-USA-PROD-FR

Campaign Card

Campaign Prices & Discounts More options

General

No. KEHE7920 ... Ending Date ...

Description ... Salesperson Code ...

Status Code ... Last Date Modified ...

Starting Date ... Activated ...

Invoicing

Prod line Code ... Department Code ...

Notes +

(There is nothing to show in this view)

7 Add the description in the Description field, in this example it is KEHE7920.

Dynamics 365 Business Central

Environment: ECL-ENV-USA-PROD-FR

Campaign Card

Campaign Prices & Discounts More options

General

No. KEHE7920 ... Ending Date ...

Description KEHE7920 Salesperson Code ...

Status Code ... Last Date Modified ...

Starting Date ... Activated ...

Invoicing

Prod line Code ... Department Code ...

Notes +

(There is nothing to show in this view)

8

Next, we are adding the customer contacts that are valid to receive this promo - Click "Segments"

The screenshot shows the Dynamics 365 Business Central interface for a Campaign Card. The card is titled "KEHE7920 · KEHE7920". The "Segments" tab is highlighted with an orange circle. The card displays various fields for campaign details, including No., Description, Status Code, Starting Date, Ending Date, Salesperson Code, Last Date Modified, and Activated. The "Invoicing" section shows Prod line Code and Department Code. The right pane is empty, displaying "(There is nothing to show in this view)".

9

Click "New"

The screenshot shows the Dynamics 365 Business Central interface for the Segments table of the campaign KEHE7920. The "+ New" button is highlighted with an orange circle. The table has columns for No., Description, Campaign No., Salesperson Code, and Date. The table is currently empty, displaying "(There is nothing to show in this view)".

10

Paste the Promo name into the Description field. The Segment "No" will auto populate.

Dynamics 365 Business Central

Environment: ECL-ENV-USA-PROD-FR

Segment

Log Add Contacts... Print Cover Sheets More options

General Show less

No.		Date	
Description		No. of Lines	0
Salesperson Code		No. of Criteria Actions	0

Interaction

Interaction Template Code		Correspondence Type (Default)	
Language Code (Default)		Information Flow	
Subject (Default)		Initiated By	
Attachment	☐	Unit Cost (\$)	0.00
Word Template Code		Unit Duration (Min.)	0
Modified Word Template	☐	Send Word Docs. as Attmt.	☐
Ignore Contact Corres. Type	☐		

11

Click "Add Contacts..."

Dynamics 365 Business Central

Environment: ECL-ENV-USA-PROD-FR

Segment

SM00001 · KEHE7920

Log Add Contacts... Print Cover Sheets More options

General Show less

No.	SM00001	Date	12/9/2025
Description	KEHE7920	No. of Lines	0
Salesperson Code		No. of Criteria Actions	0

Interaction

Interaction Template Code		Correspondence Type (Default)	
Language Code (Default)		Information Flow	
Subject (Default)		Initiated By	
Attachment	☐	Unit Cost (\$)	0.00
Word Template Code		Unit Duration (Min.)	0
Modified Word Template	☐	Send Word Docs. as Attmt.	☐
Ignore Contact Corres. Type	☐		

12 Scroll down to section "Contact Industry Group".

The screenshot shows the 'Add Contacts' dialog box in a software application. The dialog has a title bar with a close button. It contains several filter sections: 'Filter: Contact Job Responsibility', 'Filter: Contact Industry Group', 'Filter: Contact Business Relation', and 'Filter: Value Entry'. The 'Filter: Contact Industry Group' section is highlighted with an orange circle, and its dropdown menu is open, showing a list of industry group codes. The background shows a partially visible 'General' section of a form with fields like 'No.', 'Description', and 'Salesperson Code'.

Add Contacts

+ Filter...

Filter: Contact Job Responsibility

× Job Responsibility Code

+ Filter...

Filter: Contact Industry Group

× Industry Group Code

+ Filter...

Filter: Contact Business Relation

× Business Relation Code

+ Filter...

Filter: Value Entry

OK Cancel

13 Choose which industry group this promo is valid for. In this example: Click "KEHE - NC", then Click OK

This screenshot shows the 'Add Contacts' dialog box with the 'Filter: Contact Industry Group' dropdown menu open. The dropdown menu displays a list of industry group codes and descriptions. The 'KEHE - NC' option is highlighted with an orange circle. The background shows the same 'General' section of the form as in the previous screenshot.

Add Contacts

+ Filter...

Filter: Contact Job Responsibility

× Job Responsibility Code

+ Filter...

Filter: Contact Industry Group

× Industry Group Code

+ Filter...

Filter: Contact Business Relation

× Business Relation Code

+ Filter...

Filter: Value Entry

OK Cancel

Code ↑	Description
HEB - NC	HEB Promo NC
KEHE - NC	KEHE Promo's NC
UNFI - NC	UNFI Promo's NC

+ New Show details Select from full list

14

All 18 Customer contacts belonging to the Kehe - NC industry group are now added to this promo.

Dynamics 365 Business Central

Environment: ECL-ENV-USA-PROD-FR

Segment: SM00001 · KEHE7920

Log Add Contacts... Print Cover Sheets More options

General

No. SM00001 Date 12/9/2025

Description KEHE7920 No. of Lines 18

Salesperson Code No. of Criteria Actions 1

Interaction

Interaction Template Code Correspondence Type (Default)

Language Code (Default) Information Flow

Subject (Default) Initiated By

Attachment Unit Cost (\$) 0.00

Word Template Code Unit Duration (Min.) 0

Modified Word Template Send Word Docs. as Attmt.

Ignore Contact Corres. Type

Lines >

Campaign >

15

Next step is to Activate the campaign: Click the "Campaign" section on the Segment Card

Dynamics 365 Business Central

Environment: ECL-ENV-USA-PROD-FR

Segment: SM00001 · KEHE7920

Log Add Contacts... Print Cover Sheets More options

General

No. SM00001 Date 12/9/2025

Description KEHE7920 No. of Lines 18

Salesperson Code No. of Criteria Actions 1

Interaction

Interaction Template Code Correspondence Type (Default)

Language Code (Default) Information Flow

Subject (Default) Initiated By

Attachment Unit Cost (\$) 0.00

Word Template Code Unit Duration (Min.) 0

Modified Word Template Send Word Docs. as Attmt.

Ignore Contact Corres. Type

Lines >

Campaign >

16 Click "Campaign Target" to activate.

✓ Log Add Contacts... Print Cover Sheets More options

Description KEHE7920 No. of Lines 18
Salesperson Code No. of Criteria Actions 1

Interaction

Interaction Template Code Correspondence Type (Default)
Language Code (Default) Information Flow
Subject (Default) Initiated By
Attachment Unit Cost (\$) 0.00
Word Template Code Unit Duration (Min.) 0
Modified Word Template Send Word Docs. as Attmt.
Ignore Contact Corres. Type

Lines >

Campaign

Campaign No. KEHE7920 Campaign Target 
Campaign Description KEHE7920 Campaign Response

17 Click "Yes"

✓ Log Add Contacts... Print Cover Sheets More options

Description KEHE7920 No. of Lines 18
Salesperson Code No. of Criteria Actions 1

Interaction

Interaction Template Code
Language Code (Default)
Subject (Default)
Attachment
Word Template Code
Modified Word Template
Ignore Contact Corres. Type

Lines >

Campaign

Campaign No. KEHE7920 Campaign Target 
Campaign Description KEHE7920 Campaign Response

? You have modified Campaign Target.
Do you want to update the segment lines where the Interaction Template Code is ?

 Yes No

18 Campaign is now activated. Exit the Segment card.

Segment
SM00001 · KEHE7920

✓ Log Add Contacts... Print Cover Sheets More options

Description KEHE7920 No. of Lines 18
Salesperson Code No. of Criteria Actions 1

Interaction

Interaction Template Code Correspondence Type (Default)
Language Code (Default) Information Flow
Subject (Default) Initiated By
Attachment Unit Cost (\$) 0.00
Word Template Code Unit Duration (Min.) 0
Modified Word Template Send Word Docs. as Attmt.
Ignore Contact Corres. Type

Lines >

Campaign

Campaign No. KEHE7920 Campaign Target
Campaign Description KEHE7920 Campaign Response

19 Click here.

Dynamics 365 Business Central

Environment: ECL-ENV-USA-PROD-FR

Segments

No.	Description	Campaign No. ↑ ▾	Salesperson Code	Date
SM00001	KEHE7920	KEHE7920		12/9/2025

20

For the next step the Starting date and Finish date needs to be maintained. This can be done when the Campaign card is created in step 7.

Business Central

Environment: ECL-BNV-USA-PROD-FR

Campaign Card

KEHE7920 · KEHE7920

Campaign Prices & Discounts Related Reports Automate Fewer options

General

No. KEHE7920 Ending Date Salesperson Code

Description KEHE7920 Last Date Modified 12/9/2025

Status Code Starting Date 12/29/2025 Activated

Invoicing

Prod line Code Department Code

Notes

(There is nothing to show in this view)

21

Next step is to assign the items and their discount prices to the promo. In the Campaign Card - Click More options, then Click "Related"

Dynamics 365 Business Central

Environment: ECL-BNV-USA-PROD-FR

Campaign Card

KEHE7920 · KEHE7920

Campaign Prices & Discounts Related Reports Automate Fewer options

Dimensions Statistics Comments Segments Opportunities

No. KEHE7920 Ending Date 1/30/2026 Salesperson Code

Description KEHE7920 Last Date Modified 12/9/2025

Status Code Starting Date 12/29/2025 Activated

Invoicing

Prod line Code Department Code

Related

(There is nothing to show in this view)

22 Click "Yaveon 365 Trade"

Dynamics 365 Business Central

Environment: ECL-ENV-USA-PROD-FR

Campaign Card

KEHE7920 · KEHE7920

Campaign Prices & Discounts Related Reports Automate Fewer options

Dimensions Statistics Campaign Opportunities

No. KEHE7920

Description KEHE7920

Status Code

Starting Date 12/29/2025

Yaveon 365 Sales Prices

Yaveon 365 Sales Line Discounts

Yaveon 365 Rebates in Kind

Last Date Modified 12/9/2025

Activated

Invoicing

Prod line Code

Department Code

(There is nothing to show in this view)

23 Click "Yaveon 365 Sales Line Discounts"

Dynamics 365 Business Central

Environment: ECL-ENV-USA-PROD-FR

Campaign Card

KEHE7920 · KEHE7920

Campaign Prices & Discounts Related Reports Automate Fewer options

Dimensions Statistics Campaign Opportunities

No. KEHE7920

Description KEHE7920

Status Code

Starting Date 12/29/2025

Yaveon 365 Sales Prices

Yaveon 365 Sales Line Discounts

Yaveon 365 Rebates in Kind

Last Date Modified 12/9/2025

Activated

Invoicing

Prod line Code

Department Code

(There is nothing to show in this view)

24

Add the Campaign code matching the promo name in the Sales Code field, In this example: "KEHE7920"

General

Sales Type Filter: Campaign

Sales Code Filter: KEHE7920

Starting Date Filter:

Type Filter: None

Code Filter:

Currency Code Filter:

Manage More options

Sales Type	Sales Code	Type	Code	Unit of Measure	Minimum Quantity	Template Code	Sequence No. / Discount Level	Calculation Basis	Line Discount %	Line Discount Amount per Unit	Starting Date	Ending Date
Campaign	KEHE7920	Item			0.00		0	Original Value				

No. 1 KEHE7920 Description KEHE7920 Starting Date 12/29/2025 Ending Date 1/30/2026

+ New Show details Select from full list

25

Enter the item number, In this example: Type "100539". Notice that the dates are auto populated.

Dynamics 365 Business Central

Environment: ECL-ENV-USA-PROD-FR

Yaveon 365 Sales Line Discounts

Saving...

General

Sales Type Filter: Campaign

Sales Code Filter: KEHE7920

Starting Date Filter:

Type Filter: None

Code Filter:

Currency Code Filter:

Manage More options

Sales Type	Sales Code	Type	Code	Unit of Measure	Minimum Quantity	Template Code	Sequence No. / Discount Level	Calculation Basis	Line Discount %	Line Discount Amount per Unit	Starting Date	Ending Date
Campaign	KEHE7920	Item	100539		0.00		0	Original Value			12/29/2025	1/30/2026

26

The promo has now been created in BC with the items and their discounts as specified in step 4

Yaveon 365 Sales Line Discounts

Saving...

General

Sales Type Filter: Campaign Type Filter: None

Sales Code Filter: KEHE7920 Code Filter: ...

Starting Date Filter: ... Currency Code Filter: ...

Manage More options

Sales Type ↑	Sales Code ↑	Type ↑	Code ↑	Unit of Measure Code ↑	Minimum Quantity ↑	Template Code	Sequence No. / Discount Level	Calculation Basis	Line Discount %	Line Discount Amount per Unit	Starting Date ↑	Ending Date
Campaign	KEHE7920	Item	100539	CASE	0.00		0	Original Value		4.50	12/29/2025	1/30/2026
Campaign	KEHE7920	Item	100540	CASE	0.00		0	Original Value		4.50	12/29/2025	1/30/2026
Campaign	KEHE7920	Item	100542	CASE	0.00		0	Original Value		4.50	12/29/2025	1/30/2026
→ Campaign	KEHE7920	Item	100544	CASE	0.00		0	Original Value		3.72	12/29/2025	1/30/2026

27

Final Step: "Activate Sales Prices/Line Discounts". On the Campaign Card - Click "Prices & Discounts"

Dynamics 365 Business Central

Environment: ECL-ENV-USA-PROD-FR

Campaign Card

KEHE7920 · KEHE7920

Campaign Prices & Discounts Related Reports Automate Fewer options

General

No. KEHE7920 Ending Date 1/30/2026

Description KEHE7920 Salesperson Code

Status Code Last Date Modified 12/9/2025

Starting Date 12/29/2025 Activated

Invoicing

Prod line Code Department Code

Notes +

(There is nothing to show in this view)

28 Click "Activate Sales Prices/Line Discounts"

Dynamics 365 Business Central

Environment: ECL-ENV-USA-PROD-FR

Campaign Card

KEHE7920 · KEHE7920

Campaign Prices & Discounts Related Reports Automate Fewer options

Activate Sales Prices/Line Discounts Sales Prices Sales Price Lists Sales Discounts Deactivate Sales Prices/Line Discounts

No. KEHE7920 Ending Date 1/30/2026

Description KEHE7920 Salesperson Code

Status Code Last Date Modified 12/9/2025

Starting Date 12/29/2025 Activated

Invoicing

Prod line Code Department Code

(There is nothing to show in this view)

29 Click "Yes"

Campaign Prices & Discounts Related Reports Automate Fewer options

General

No. KEHE7920 Ending Date 1/30/2026

Description KEHE7920 Salesperson Code

Status Code Last Date Modified 12/9/2025

Starting Date 12/29/2025

Invoicing

Prod line Code

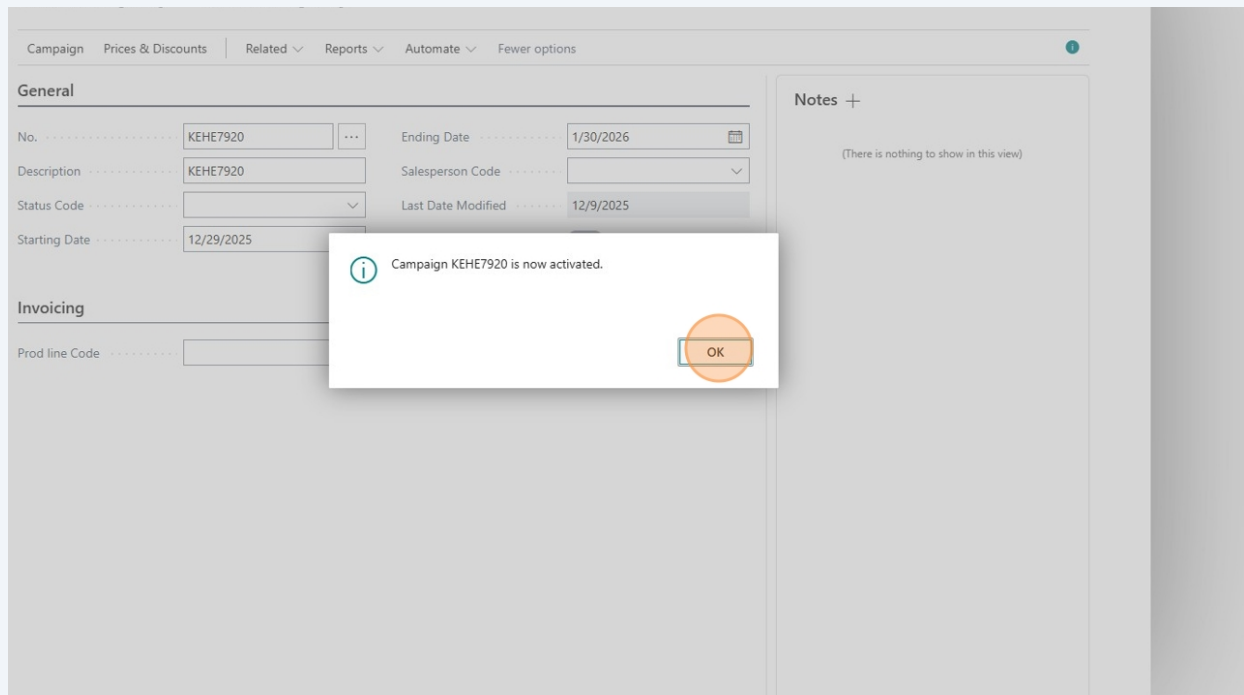
Notes +

(There is nothing to show in this view)

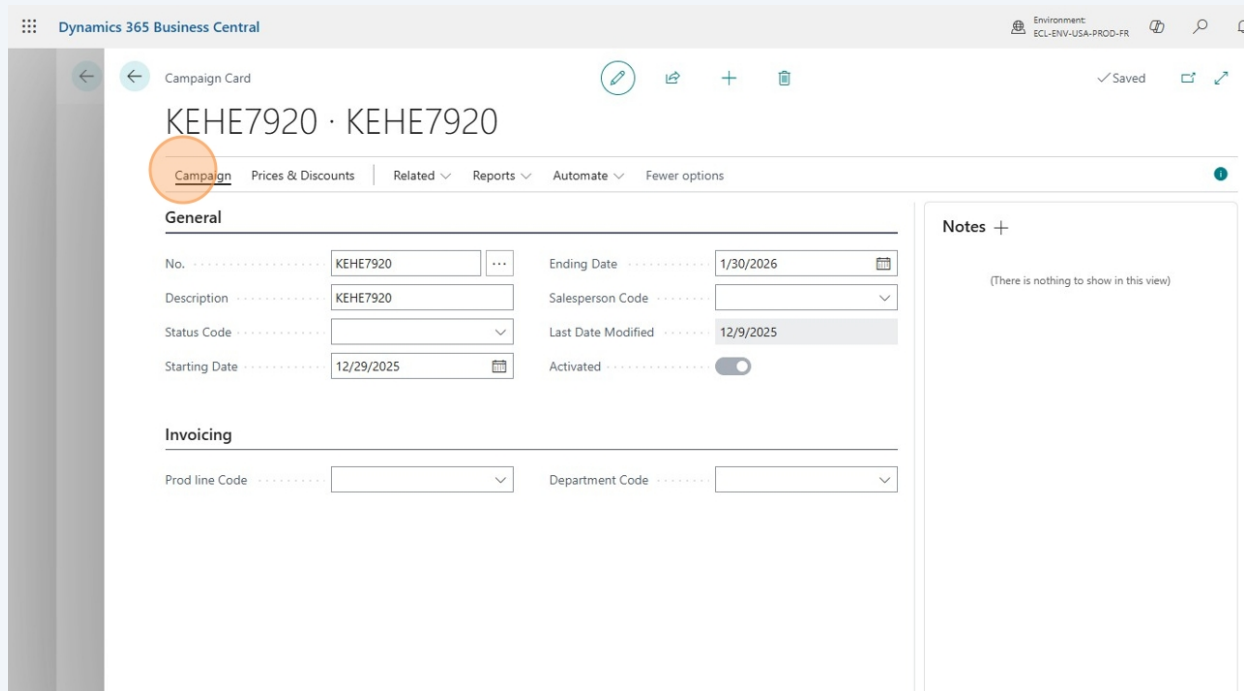
There are no Sales Prices or Sales Line Discounts currently linked to this Campaign. Do you still want to activate?

Yes No

30 Click "OK"



31 Notice how the "Activated" toggle is now activated.



32 This guide is complete.