

How to create a promotion in effectmanager front end

This guide shows you how to create a new promotion in the effectmanager front end.

This guide is only of relevance if you have the promotion module in effectmanager.



Go to *Promotion Scheduler* in effectmanager.



Creating promotions in effectmanager front end can be done in 3 different ways:

Starting from scratch

[PAGE 3](#)

Double-clicking in scheduler single view

[PAGE 7](#)

Copying existing promotion

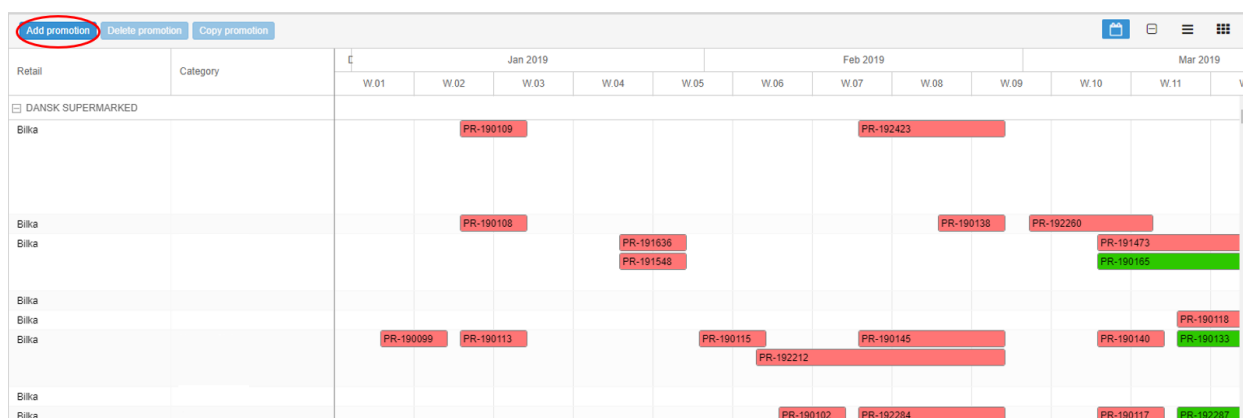
[PAGE 8](#)

Creating a promotion from scratch

1. To create a new promotion from scratch click *Add Promotion*.

You can do this Single View, Double View, ListView, and Thumbnail View.

For an explanation of the different views in Promotions Scheduler - please [see our guide](#)



2. In a pop-up window, enter the obligatory promotion information; Chain, Type, Mechanism and Start/End Date. Enter the remaining promotion information you wish and press *Next*

Create a promotion X

Wizard Step 1 of 3

State: Planned Confirmed Completed Canceled: Simulation:

Name: Number:

Chain:

Type: Flag:

Start date: End date: Delivery start: Delivery End:

Choose Start and End date - obligatory

Fixed cost: Subsidy calculation based on: Sales Inn Sales Out

Mechanism: Promotion Week:

*If empty, then promotion week will be calculated on Save.

Internal comment:

Customer comment:

3. In the next window, you can add Support Types to your promotion - if you have created this. Select the support Type and press *Next*.

If you do not use Support Types, please go to Step 4, which shows how to add products to the promotion.

Create a promotion X

Wizard Step 2 of 3

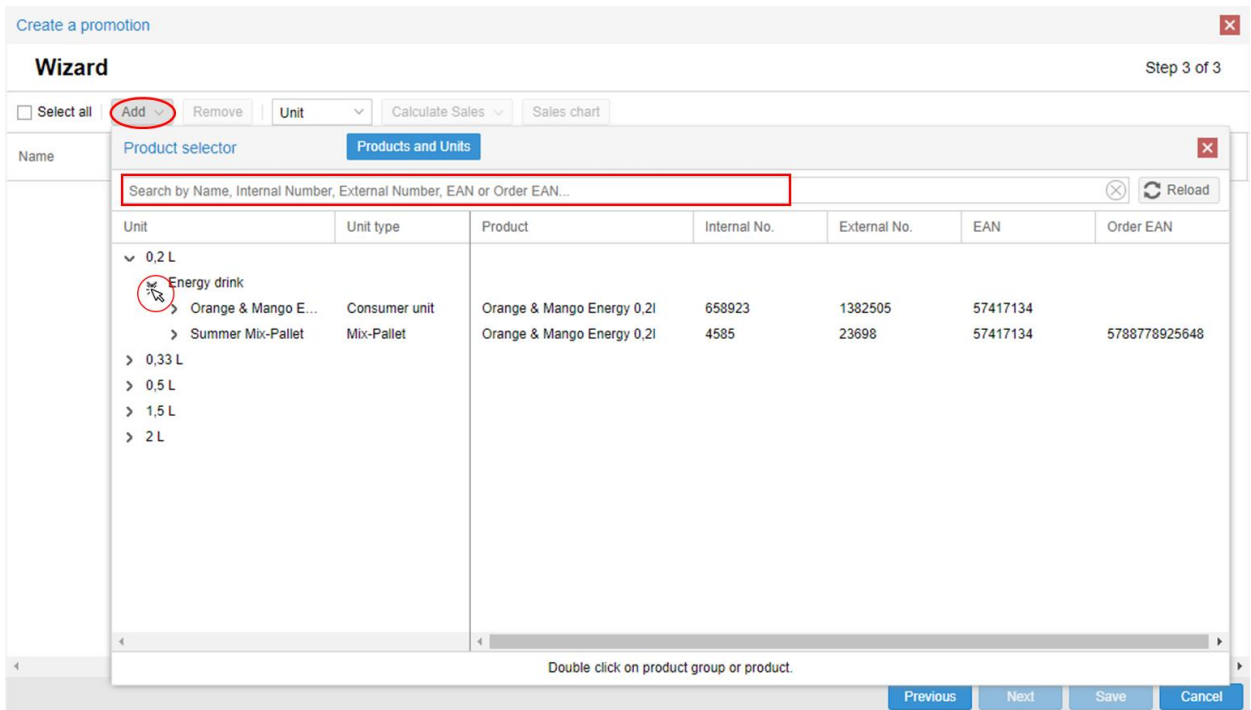
Support	Handling	Production	Fee
Pallet Raid			

4. In the next window, you can now add products or units to the promotion. Click *Add*.

In the window, you can also add Sales in, Sales out, Promotion price and Unit cost when adding products.

4.A A new pop-up window opens, and you now have the option to add *Products* or *Units* by searching by Name, EAN, Internal or External number.

- You can add *Products* or *Units* by opening up the categories and double-clicking the product you wish to add to the promotion.
- If you want to add all products from a category to the promotion, just double-click the category.
- When you are done adding products, click the red X to close the Product Selector.



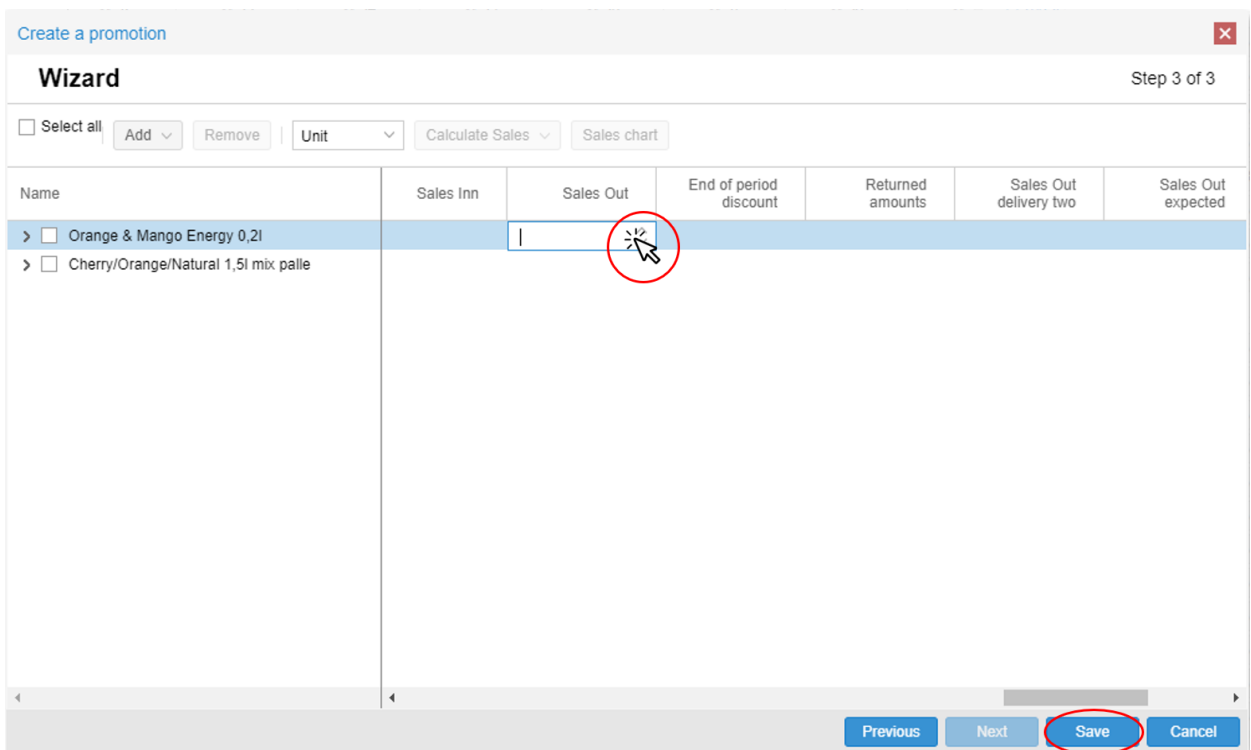
The screenshot shows the 'Create a promotion' wizard at Step 3 of 3. The 'Add' button is circled in red. A 'Product selector' pop-up window is open, showing a search bar (circled in red) and a table of products. The 'Add' button in the wizard is also circled in red.

Unit	Unit type	Product	Internal No.	External No.	EAN	Order EAN
0.2 L	Energy drink					
	Orange & Mango E...	Consumer unit	658923	1382505	57417134	
	Summer Mix-Pallet	Mix-Pallet	4585	23698	57417134	5788778925648
0.33 L						
0.5 L						
1.5 L						
2 L						

4.B Now the products are added to the promotion. In the same window, you can add data like Sales out, Sales in, Promotion price and unit cost.

- Double-click in the field you want to add data, finish by pressing enter or double-clicking another field.
- When you have added the products and data you wish to your promotion, click *Save*.

⚠ OBS! When you have saved the promotion, you can always edit the promotion details by clicking it.



Wizard Step 3 of 3

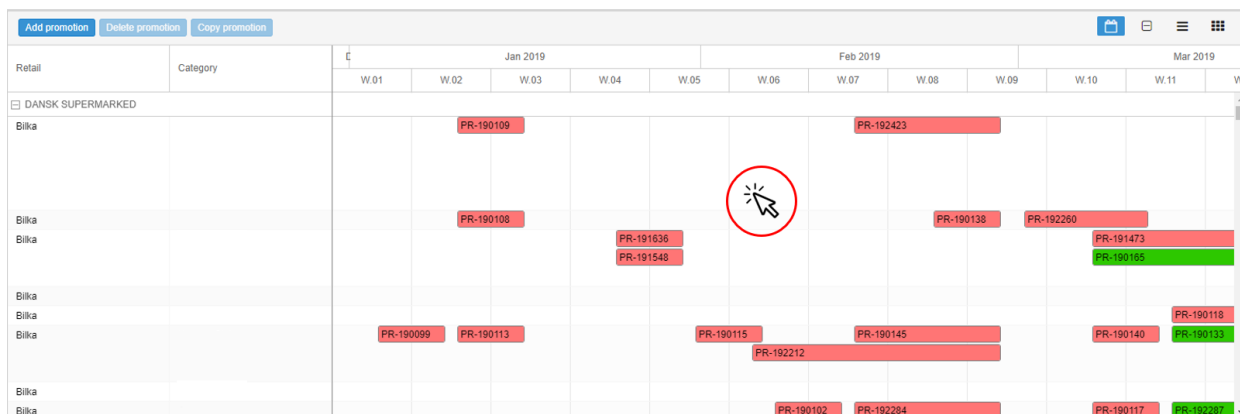
Select all

Name	Sales Inn	Sales Out	End of period discount	Returned amounts	Sales Out delivery two	Sales Out expected
> <input type="checkbox"/> Orange & Mango Energy 0,2l						
> <input type="checkbox"/> Cherry/Orange/Natural 1,5l mix palle						

Creating a promotion by double-clicking

5. To create a new promotion by double-clicking go to *Promotion Scheduler* and double-click - this can be done in Single View and Double View.

6. Now follow **Steps 2-4 above** to create the promotion.

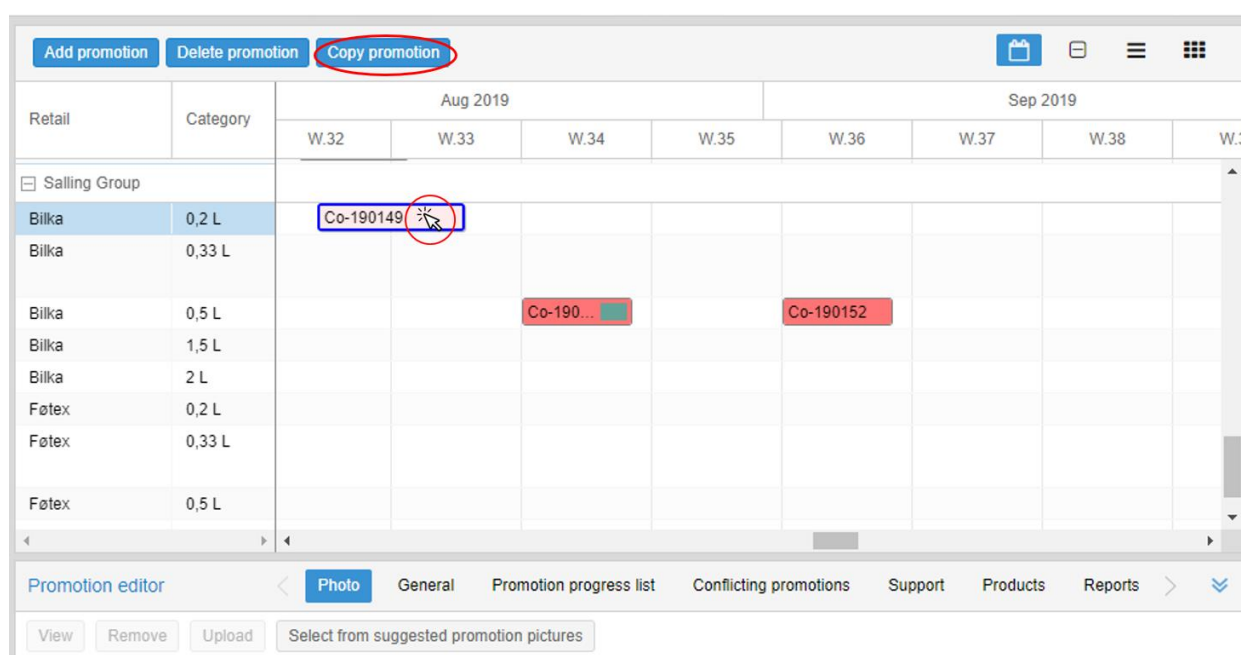


Creating a promotion by copying an existing promotion

Promotions can be copied from both Single View, Double View, ListView, and Thumbnail View.

Our guide will show you how to copy a promotion in Single View, but the steps are the same.

7. To copy an existing promotion go to *Promotion Scheduler* and select the promotion you want to copy by clicking it. Then click *Copy Promotion*.

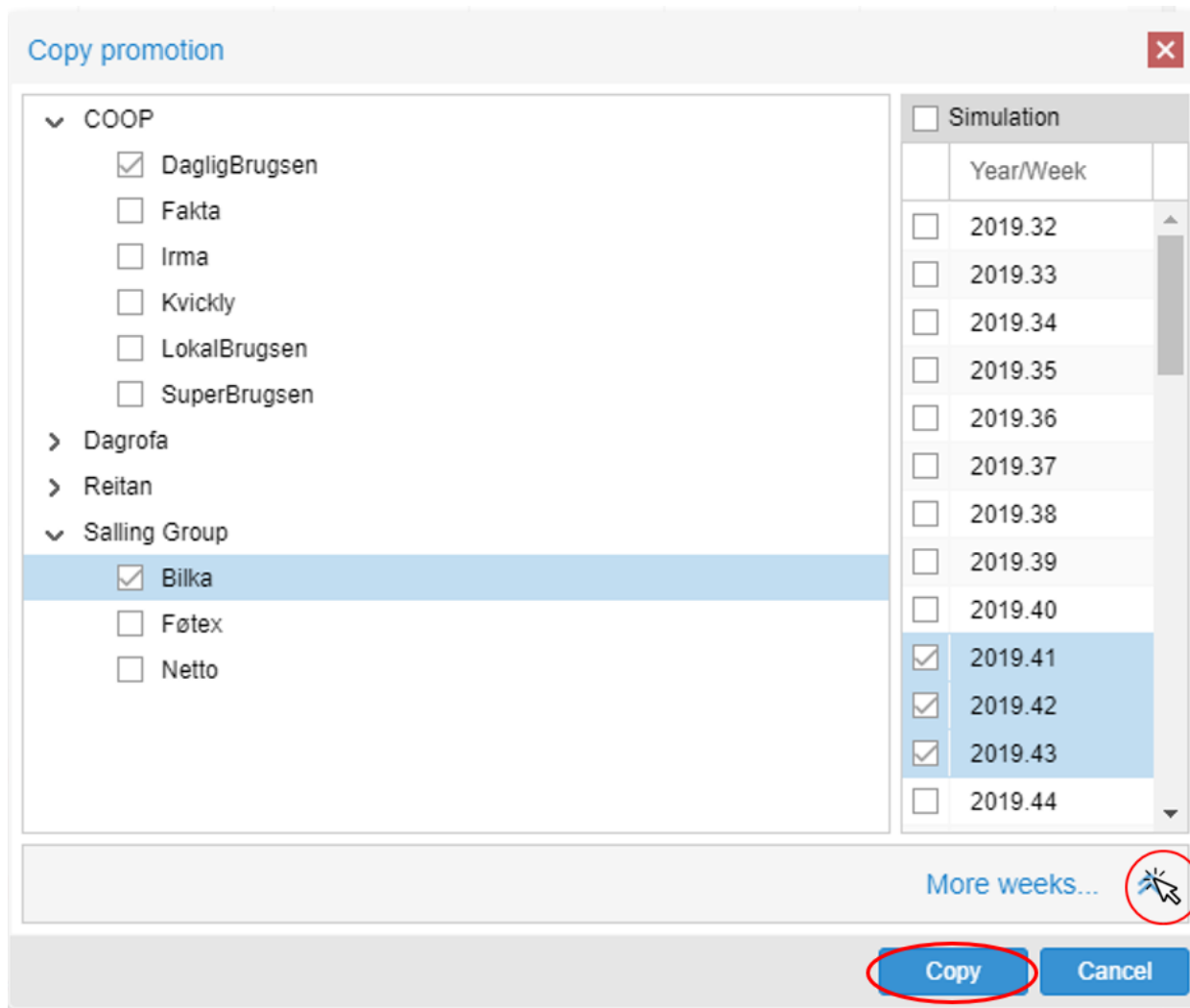


The screenshot shows the 'Promotion Scheduler' interface. At the top, there are buttons for 'Add promotion', 'Delete promotion', and 'Copy promotion' (circled in red). Below this is a grid showing promotions for 'Retail' across weeks from August 2019 to September 2019. The 'Selling Group' is 'Bilka'. The promotion 'Co-190149' is selected in week W.33 (circled in red). Other promotions like 'Co-190152' are visible in weeks W.36 and W.37. At the bottom, there is a 'Promotion editor' section with tabs for 'Photo', 'General', 'Promotion progress list', 'Conflicting promotions', 'Support', 'Products', and 'Reports'. There are also buttons for 'View', 'Remove', 'Upload', and a text input 'Select from suggested promotion pictures'.

8. The promotion can now be copied to a single week or several weeks and across chains and to several chains. When you have selected the weeks, and chains you wish to copy the promotion to press *Copy*.

8.A If the period you want to copy your promotion to is not shown in the *Year/Week column*, press *More Weeks*. In the calendar, you can now select a period and press *More Weeks* to select the period.

Now follow **step 8** to finish copying your promotion.



Copy promotion

COOP

- DagligBrugsen
- Fakta
- Irma
- Kvickly
- LokalBrugsen
- SuperBrugsen

> Dagrofa


> Reitan

Salling Group

- Bilka
- Føtex
- Netto

Simulation

	Year/Week
<input type="checkbox"/>	2019.32
<input type="checkbox"/>	2019.33
<input type="checkbox"/>	2019.34
<input type="checkbox"/>	2019.35
<input type="checkbox"/>	2019.36
<input type="checkbox"/>	2019.37
<input type="checkbox"/>	2019.38
<input type="checkbox"/>	2019.39
<input type="checkbox"/>	2019.40
<input checked="" type="checkbox"/>	2019.41
<input checked="" type="checkbox"/>	2019.42
<input checked="" type="checkbox"/>	2019.43
<input type="checkbox"/>	2019.44

More weeks... 

Copy **Cancel**

⚠ OBS! You will experience an error message if you copy a promotion to a chain, where one or more products are not listed. If you wish to add the products or units, then you need to add the chains to the products.