

How to use Promotion Editor in Promotion Scheduler

This guide explains the different tabs in promotion editor in effectmanager.

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



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Go to Promotion Scheduler in effectmanager and select a promotion in the view of your choice.

In Promotion Editor, there are 8 tabs for editing and analyzing your promotion.

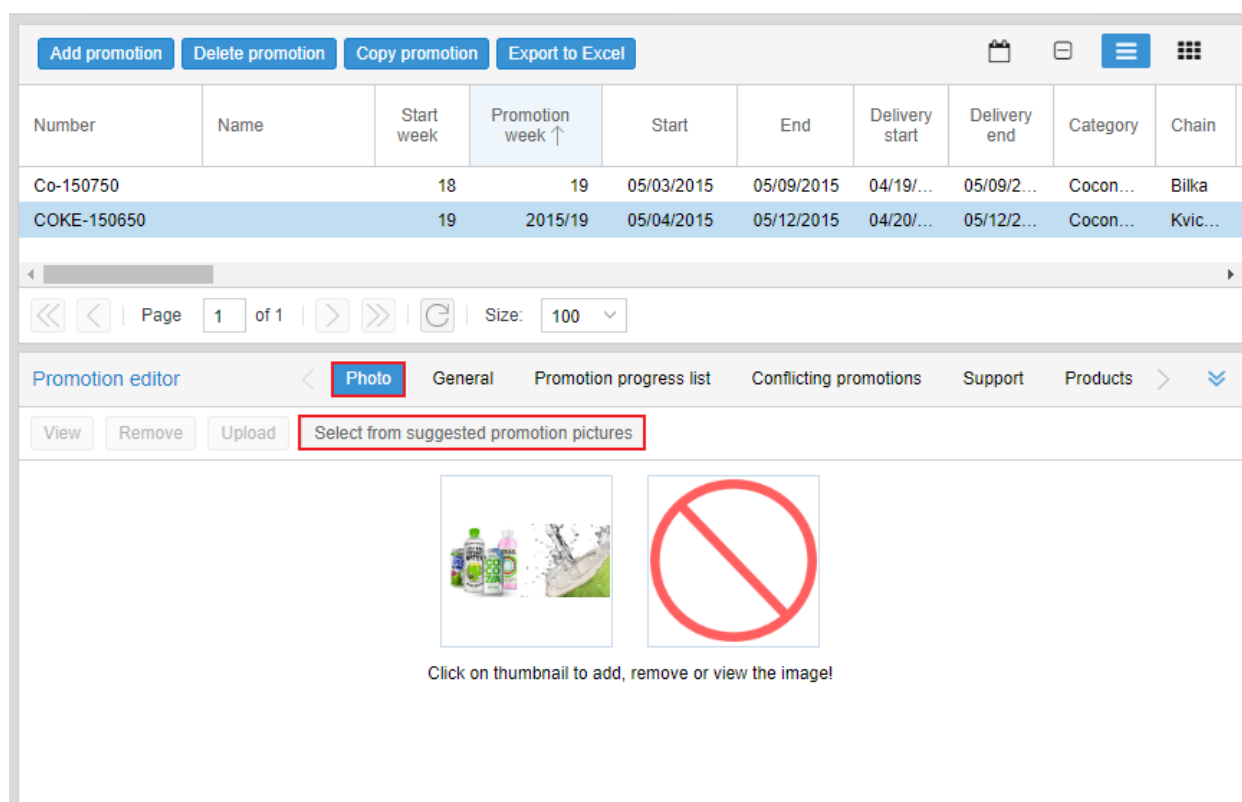
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Promotion Editor - Photo

The first tab in Promotion Editor is *Photo*. In this tab, you can view, remove, or add photos from the leaflets. These photos are used in the Result Report, that you can see in Promotion Editor.

But the leaflet photos are also used in Promotion Scheduler Thumbnail view and the Period Report.

If you have a Tilbudsdata integration, you can select the leaflet photo from *Select from suggested promotion pictures*.



The screenshot shows the 'Promotion Editor' interface. At the top, there are buttons for 'Add promotion', 'Delete promotion', 'Copy promotion', and 'Export to Excel'. Below these is a table with columns: Number, Name, Start week, Promotion week ↑, Start, End, Delivery start, Delivery end, Category, and Chain. Two rows are visible: 'Co-150750' and 'COKE-150650'. Below the table is a pagination control showing 'Page 1 of 1' and a 'Size: 100' dropdown. The 'Photo' tab is selected, and a red box highlights the 'Select from suggested promotion pictures' button. Below this button are two thumbnails: one showing a product (a bottle of cleaning solution) and another showing a red circle with a diagonal line through it, indicating a missing or invalid image. A caption below the thumbnails reads: 'Click on thumbnail to add, remove or view the image!'.

Number	Name	Start week	Promotion week ↑	Start	End	Delivery start	Delivery end	Category	Chain
Co-150750		18	19	05/03/2015	05/09/2015	04/19/...	05/09/2...	Cocon...	Bilka
COKE-150650		19	2015/19	05/04/2015	05/12/2015	04/20/...	05/12/2...	Cocon...	Kvic...

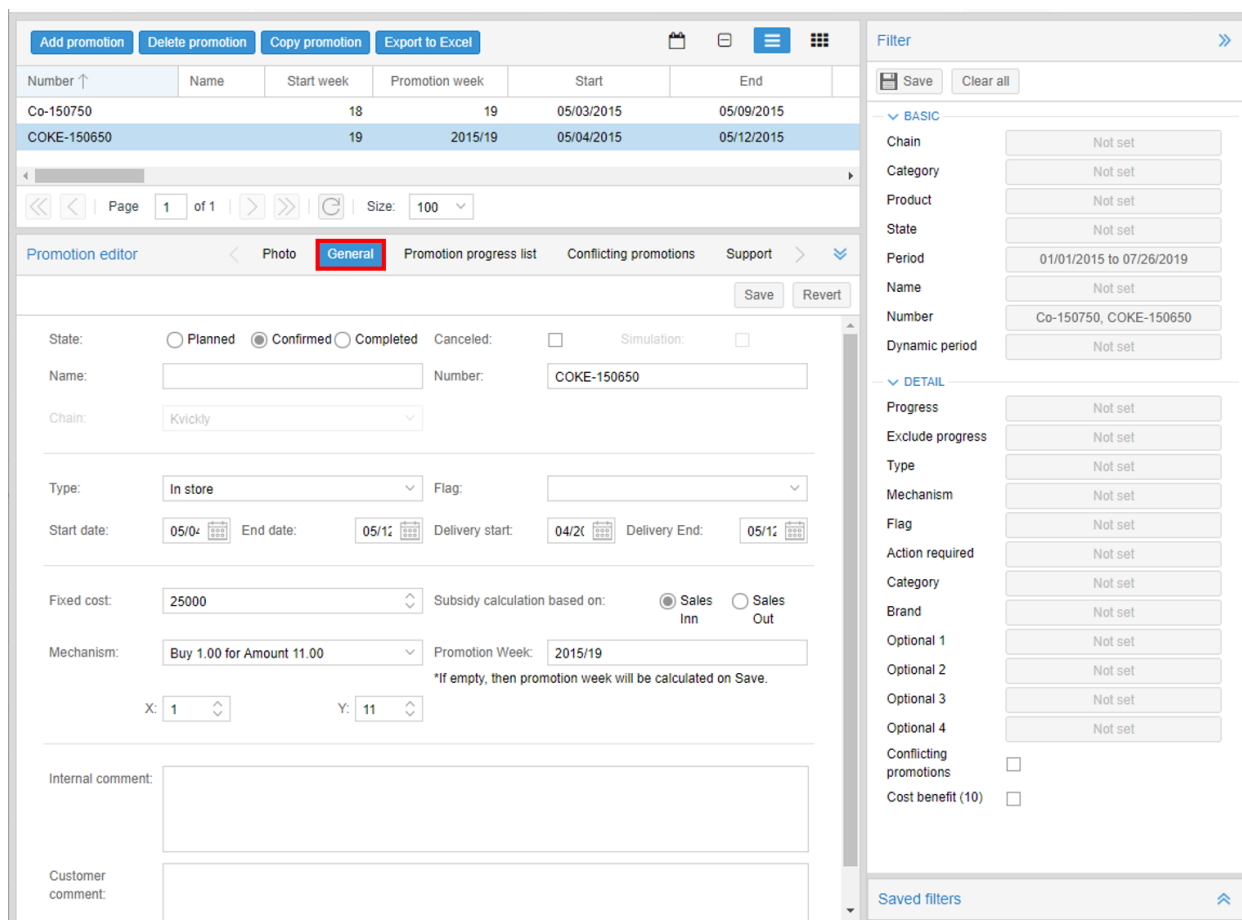
If you are looking for a guide with explanation of how to upload photos, please see our guide [How to upload leaflet pictures from Tilbudsdata](#)

Promotion Editor - General

The second tab in Promotion Editor is *General*. In this tab, you can edit the general information for your promotion such as promotion Name, Type, Start/end date, Fixed Costs, Mechanism, etc.

It is in this tab you will change the promotion state from Planned to Confirmed and last Completed.

NB! It is only for completed promotions that Point of Sales data will be updated with the biweekly POS integration.



The screenshot shows the 'Promotion Editor' interface with the 'General' tab selected. The interface includes a table of promotions, a navigation bar, and a detailed form for editing promotion details.

Number ↑	Name	Start week	Promotion week	Start	End
Co-150750		18	19	05/03/2015	05/09/2015
COKE-150650		19	2015/19	05/04/2015	05/12/2015

Promotion editor (General tab)

Buttons: Add promotion, Delete promotion, Copy promotion, Export to Excel

Form fields:

- State: Planned Confirmed Completed
- Name:
- Number:
- Chain:
- Type: Flag:
- Start date: End date: Delivery start: Delivery End:
- Fixed cost: Subsidy calculation based on: Sales Inn Sales Out
- Mechanism: Promotion Week:
- X: Y:
- Internal comment:
- Customer comment:

Filter panel (right):

- Save, Clear all
- BASIC: Chain, Category, Product, State, Period, Name, Number, Dynamic period
- DETAIL: Progress, Exclude progress, Type, Mechanism, Flag, Action required, Category, Brand, Optional 1, Optional 2, Optional 3, Optional 4, Conflicting promotions, Cost benefit (10)

Promotion Editor - Promotion Progress list

The third tab in Promotion Editor is *Promotion Progress list*. It is in this tab, that you can see, the progress of the promotion and check off the items as your promotion progresses.

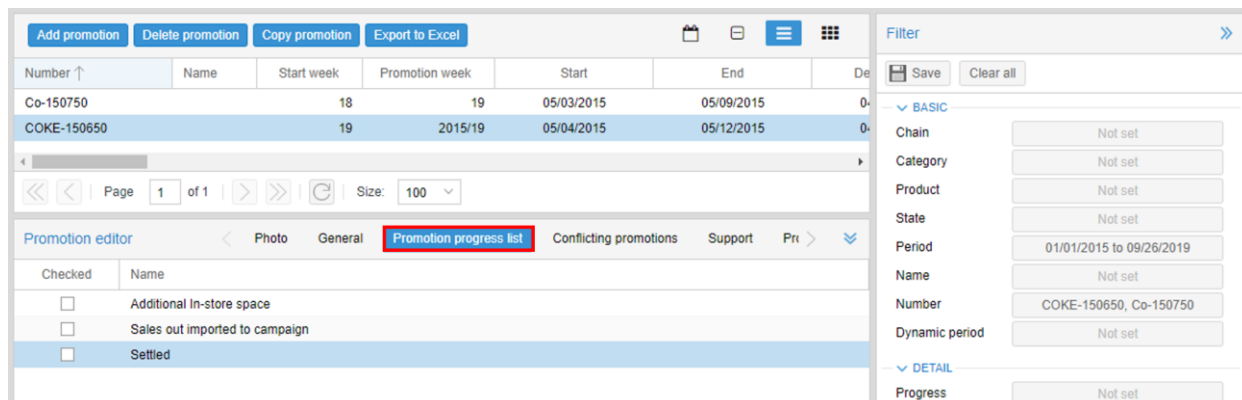
You can add checklist items such as Settled and Additional In-Store Space, or those you use for promotions.

In Promotion Properties, in Settings, you can create checklist items for promotions.

If you need to create checklist items for the Promotion Progress list, please see our guide [How to use Promotion Properties](#).

The checklist item *Sales out imported to campaign* will be marked automatically when the following is true:

- ✓ Promotions have state Completed.
- ✓ POS data for the wholesaler is uploaded to effectmanager.
- ✓ The biweekly POS integrations have run the night to Wednesday and Friday.



Number ↑	Name	Start week	Promotion week	Start	End	De
Co-150750		18	19	05/03/2015	05/09/2015	04
COKE-150650		19	2015/19	05/04/2015	05/12/2015	04

Checked	Name
<input type="checkbox"/>	Additional In-store space
<input type="checkbox"/>	Sales out imported to campaign
<input type="checkbox"/>	Settled

If you want to import sales out to the promotion again this can be done in two ways, please see our guide [How to update promotions Sales Figures](#)

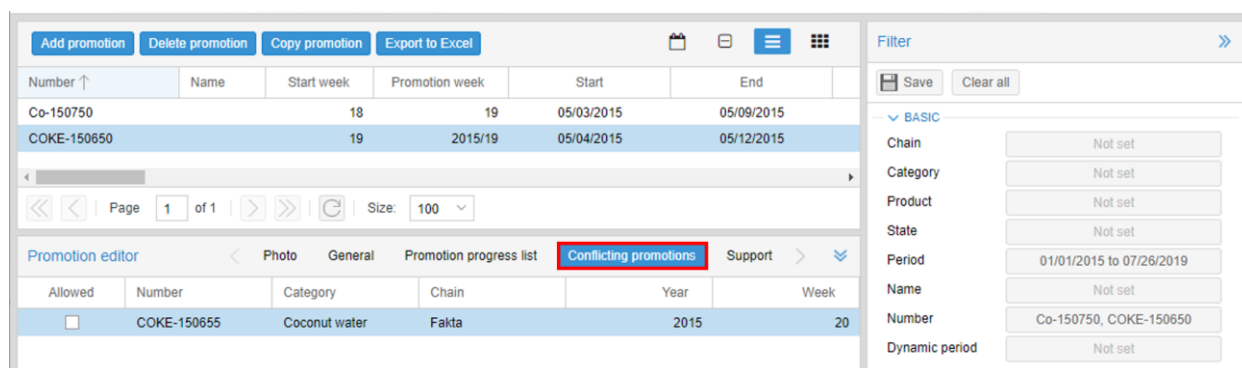
Promotion Editor - Conflicting promotions

The fourth tab in the Promotion Editor is *Conflicting promotions*. In this tab, you can identify if you have any conflicting promotions. This check is made across Retailers and Retail Chains.

To show conflicting promotions, the promotions will need to have the following two in common:

- Identical periods (promotion start/end dates)
- Identical product groups.

In this tab, you also have the option to check off that the conflicting promotion is allowed.



Number ↑	Name	Start week	Promotion week	Start	End
Co-150750		18	19	05/03/2015	05/09/2015
COKE-150650		19	2015/19	05/04/2015	05/12/2015

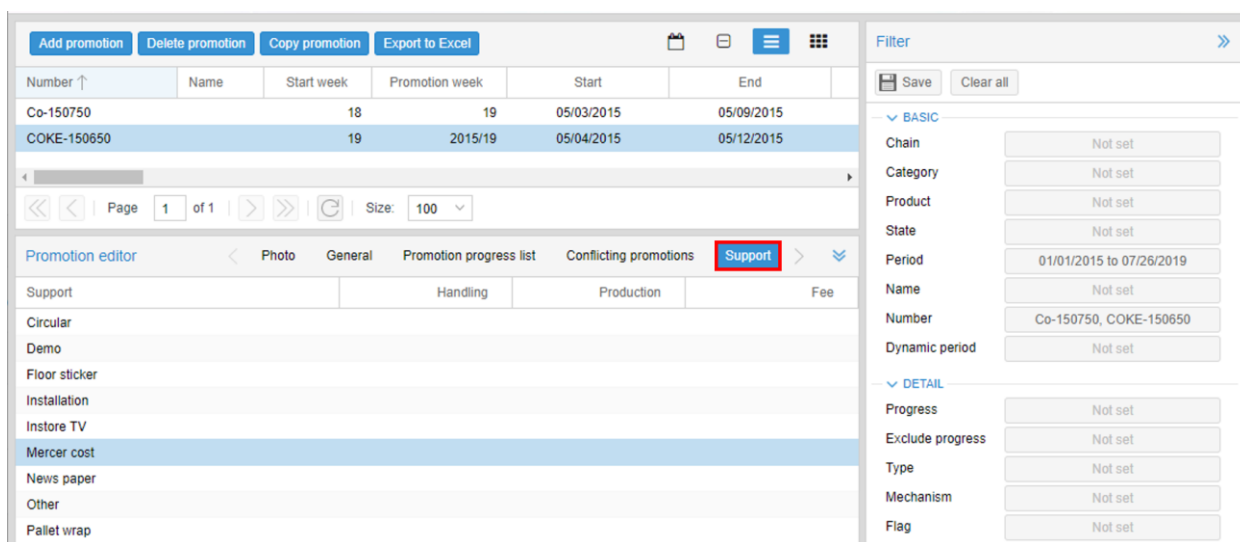
Allowed	Number	Category	Chain	Year	Week
<input type="checkbox"/>	COKE-150655	Coconut water	Fakta	2015	20

Promotion Editor - Support

The fifth tab in Promotion Editor is *Support*. In this tab, you can see all the support types you have created in Promotion Properties in Settings.

In this tab, you can also edit, add, and remove support types on the promotion. You do this, by double-clicking on the field Handling, Production or Fee next to the support type you want to edit, add or remove. Finish by pressing enter.

If you need to create or edit the Support types, please see our guide [How to use Promotion Properties](#).



The screenshot shows the Promotion Editor interface. At the top, there are buttons for 'Add promotion', 'Delete promotion', 'Copy promotion', and 'Export to Excel'. Below these is a table with columns: Number, Name, Start week, Promotion week, Start, and End. The table contains two rows: 'Co-150750' and 'COKE-150650'. Below the table is a pagination bar showing 'Page 1 of 1' and a 'Size: 100' dropdown. The main area is divided into tabs: 'Promotion editor', 'Photo', 'General', 'Promotion progress list', 'Conflicting promotions', and 'Support' (which is highlighted with a red box). Below the tabs is a table with columns: Support, Handling, Production, and Fee. The 'Support' column contains a list of support types: Circular, Demo, Floor sticker, Installation, Instore TV, Mercer cost (highlighted in blue), News paper, Other, and Pallet wrap. On the right side, there is a 'Filter' section with 'Save' and 'Clear all' buttons. Below the filter are two sections: 'BASIC' and 'DETAIL'. The 'BASIC' section includes fields for Chain, Category, Product, State, Period, Name, Number, and Dynamic period. The 'DETAIL' section includes fields for Progress, Exclude progress, Type, Mechanism, and Flag. Most of these fields are currently set to 'Not set'.

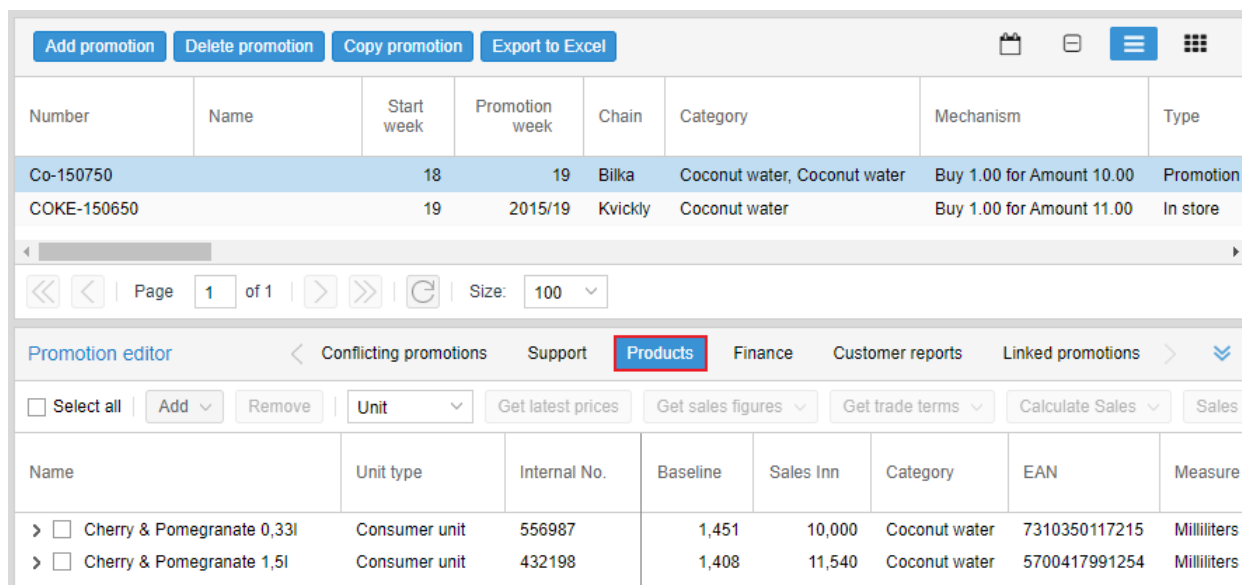
Promotion Editor - Products

The sixth tab in Promotion Editor is *Products*. In this tab, you can see the products you added to the promotion when it was created. You can add/remove or edit all the promotion information from the columns also found in List View.

To edit the information in the columns, just double-click on the field, enter your values and finish by pressing enter.

If you need further explanation of the columns in List View, please see our guide [How to use List View columns in Promotion Scheduler](#)

If you need further explanation of the different types of promotion costs, please see our guide [How to use the different types of promotions costs](#)



Number	Name	Start week	Promotion week	Chain	Category	Mechanism	Type
Co-150750		18	19	Bilka	Coconut water, Coconut water	Buy 1.00 for Amount 10.00	Promotion I
COKE-150650		19	2015/19	Kvicky	Coconut water	Buy 1.00 for Amount 11.00	In store

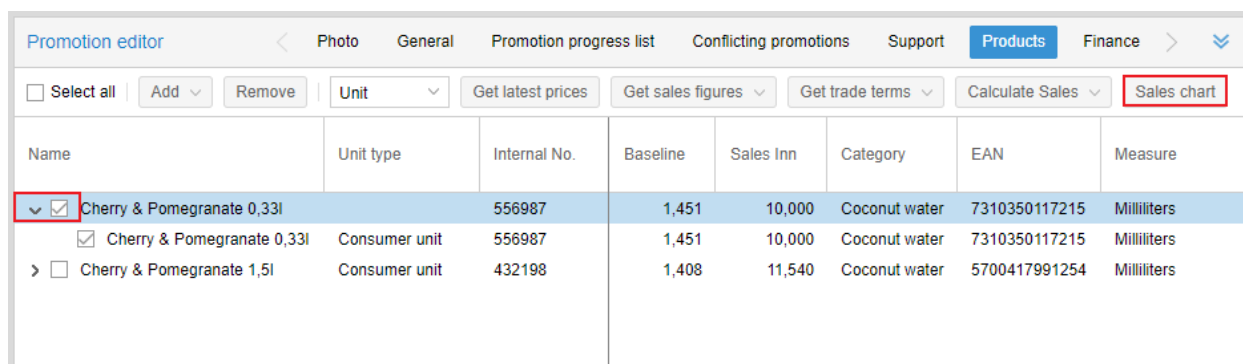
Name	Unit type	Internal No.	Baseline	Sales Inn	Category	EAN	Measure
> <input type="checkbox"/> Cherry & Pomegranate 0,33l	Consumer unit	556987	1,451	10,000	Coconut water	7310350117215	Milliliters
> <input type="checkbox"/> Cherry & Pomegranate 1,5l	Consumer unit	432198	1,408	11,540	Coconut water	5700417991254	Milliliters

To import this, you need to:

- Select the product(s) to correct this for.
- Press either *Get latest prices*, *Get sales figures* or *Get trade terms*.
- Then select the key figures you wish to update.

Remember to save the promotion with these updates.

The Sales chart can be used to provide you with historic sales charts to better input your volumes when creating or editing a promotion. The Sales Chart shows both Sales Inn and Sales Out volumes in Sales Units. To see the Sales Chart, select the product and press *Sales Chart*.



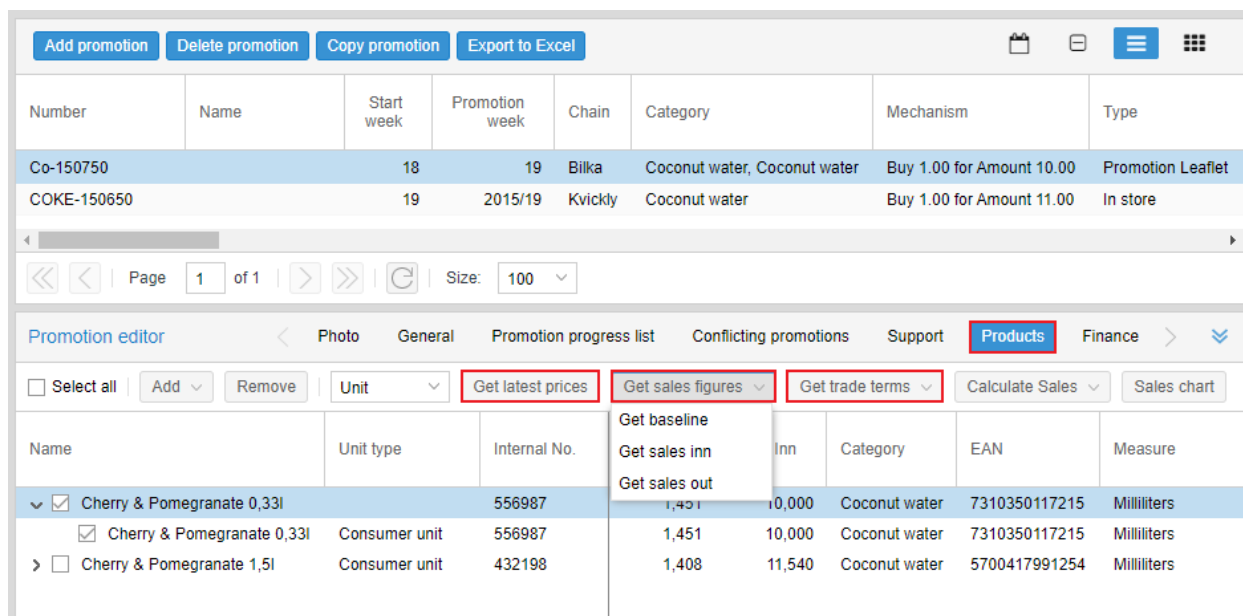
Name	Unit type	Internal No.	Baseline	Sales Inn	Category	EAN	Measure
<input checked="" type="checkbox"/> Cherry & Pomegranate 0,33l		556987	1,451	10,000	Coconut water	7310350117215	Milliliters
<input checked="" type="checkbox"/> Cherry & Pomegranate 0,33l	Consumer unit	556987	1,451	10,000	Coconut water	7310350117215	Milliliters
<input type="checkbox"/> Cherry & Pomegranate 1,5l	Consumer unit	432198	1,408	11,540	Coconut water	5700417991254	Milliliters

In the Products tab, you can also import the latest prices, sales figures, and trade terms.

To import this, you need to:

- Select the product(s) to correct this for.
- Press either *Get latest prices*, *Get sales figures* or *Get trade terms*.
- Then select the key figures you wish to update.

Remember to save the promotion with these updates.



Number	Name	Start week	Promotion week	Chain	Category	Mechanism	Type
Co-150750		18	19	Bilka	Coconut water, Coconut water	Buy 1.00 for Amount 10.00	Promotion Leaflet
COKE-150650		19	2015/19	Kvickly	Coconut water	Buy 1.00 for Amount 11.00	In store

Name	Unit type	Internal No.	Get baseline	Get sales inn	Inn	Category	EAN	Measure
<input checked="" type="checkbox"/> Cherry & Pomegranate 0,33l		556987	1,451	10,000	Coconut water	7310350117215	Milliliters	
<input checked="" type="checkbox"/> Cherry & Pomegranate 0,33l	Consumer unit	556987	1,451	10,000	Coconut water	7310350117215	Milliliters	
<input type="checkbox"/> Cherry & Pomegranate 1,5l	Consumer unit	432198	1,408	11,540	Coconut water	5700417991254	Milliliters	

Promotion Editor - Finance

The seventh tab in Promotion Editor is *Customer Reports*. In this tab, you can find 4 finance reports for you. The key figures in these reports are also visible in the Products tab and List View.

Number	Name	Start week	Promotion week ↑	Start	End	Delivery start	Delivery end	Category	Chain	Mechanism	Type
Co-150750		18	19	05/03/2015	05...	04/19/...	05/09/2...	Cocon...	Bilka	Buy 1.00 f...	Promotion Leaflet
COKE-150650		19	2015/19	05/04/2015	05...	04/20/...	05/12/2...	Cocon...	Kvic...	Buy 1.00 f...	In store

		Cojaco		Chain	
		Baseline	Promotion	Baseline	Promotion
∨ Turnover		15,761	189,000	22,815	158,400
COGS		-11,858	-142,200	-16,511	-198,000
∨ Gross income		3,903	46,800	6,304	-39,600
> Promotion costs			-43,000		43,000
∨ Gross margin			3,800		3,400
Opportunity cost			-3,903		-6,304
Cost benefit			-103		-2,904
Gross income pct.		24.76 %	24.76 %	27.63 %	-25.00 %
Gross margin pct.			2.01 %		2.15 %
ROI			1.00		
Volume lift			11.99		

The **four promotion finance reports for you** are Finance, P&L, P&L Sales In, and P&L Sales Out. These reports provide you with an overview of the promotion performance. Export is not possible. If you need to do any further analysis, we recommend using the Promotion cube.

Promotion Editor – Customer Reports

The eighth tab in Promotion Editor is *Customer Reports*. In this tab, you will find 2 customer reports. The key figures in these reports are also visible in the Products tab and List View.

NB! All the key figures in Promotion Scheduler are also available in your Promotion Cube. If you need to report on several promotions, we recommend using the Promotion Cube.

If you need a guide that shows you how to connect to your promotion cube, please see our guide [How to connect to a Promotion cube in Excel](#)

Add promotion Delete promotion Copy promotion Export to Excel
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Number	Name	Start week	Promotion week ↑	Start	End	Delivery start	Delivery end	Category	Chain	Mechanism	Type
Co-150750		18	19	05/03/2015	05...	04/19/...	05/09/2...	Cocon...	Bilka	Buy 1.00 f...	Promotion Leaflet
COKE-150650		19	2015/19	05/04/2015	05...	04/20/...	05/12/2...	Cocon...	Kvic...	Buy 1.00 f...	In store

Page 1 of 1 | Size: 100

Promotion editor
Photo General Promotion progress list Conflicting promotions Support Products Finance **Customer reports**

Proposal Result
Print Excel PowerPoint PDF

Cojaco®

Promotion name:

Promotion mechanism: Buy 1.00 for Amount 11.00

Customer comment:

Chain: Kvickly

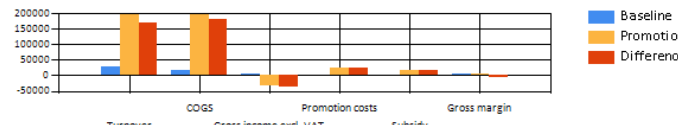
Start: 5/4/2015

End: 5/12/2015

Kvickly

Summary

Finance	Baseline	Promotion	Difference
Turnover incl. VAT	28,519	198,000	169,481
COGS excl. VAT	16,511	198,000	181,489
Gross income excl. VAT	6,304	-39,600	-45,904
Promotion costs excl. VAT		25,000	25,000
Subsidy excl. VAT		18,000	18,000
Gross margin excl. VAT	6,304	3,400	-2,904



Products

Product name	Product image	External product no.	EAN	Inn price excl. VAT	Unit cost excl. VAT	Percentage cost excl. VAT	Nett price excl. VAT	RSP incl. VAT	Promotion price incl. VAT	Gross income excl. VAT	Gross income %	Conf. sales inn (pcs.)	Baseline (pcs.)	Conf. sales out (pcs.)	Promotion lift %
Grape & Elder flower															

NB! If you have linked promotions, the Promotion Reports will include the result from these promotions.

The two customer reports are a Proposal Report and a Result Report. You can export both reports to Excel, PowerPoint, and PDF before sending them to customers.

For a full description of the two reports, please see our guides [Promotion's Customer Proposal report](#) or [Promotion's Customer Result report](#)

Promotion Editor - Linked Promotions

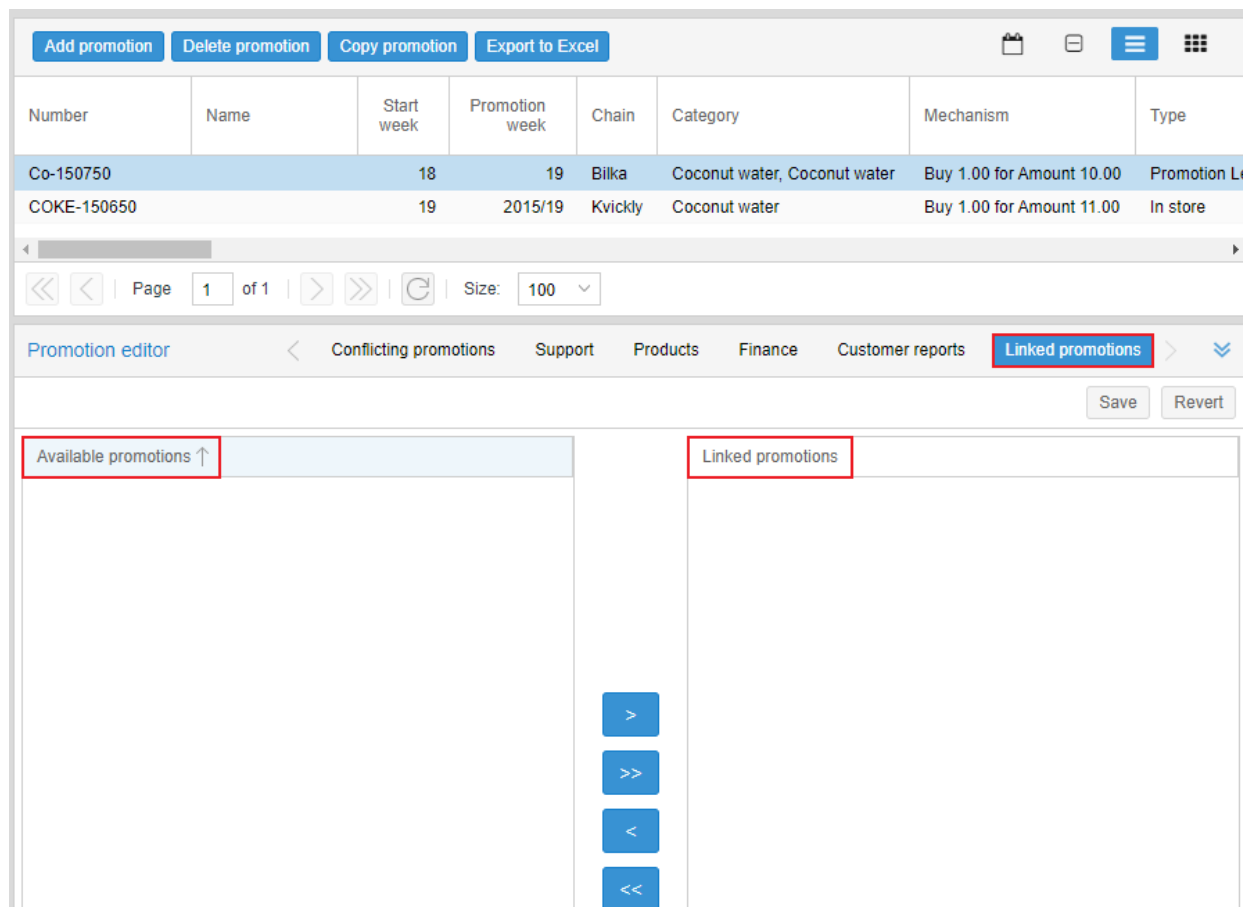
The ninth and last tab in Promotion Editor is *Linked Promotions*. In this tab, on the column on the right, you see which promotions are linked to the active promotion.

In the column on the left, you can also see the available promotions, for linking.

Promotions will appear in the Available Promotions column if:

- a promotion is active on the same Retail Chain and for the same period (promotion start/end date).

NB! If you have linked promotions, the Promotion Reports will include the result from these promotions.



The screenshot shows the 'Promotion editor' interface with the 'Linked promotions' tab selected. At the top, there are buttons for 'Add promotion', 'Delete promotion', 'Copy promotion', and 'Export to Excel'. Below these is a table with the following data:

Number	Name	Start week	Promotion week	Chain	Category	Mechanism	Type
Co-150750		18	19	Bilka	Coconut water, Coconut water	Buy 1.00 for Amount 10.00	Promotion Le
COKE-150650		19	2015/19	Kvicky	Coconut water	Buy 1.00 for Amount 11.00	In store

Below the table is a pagination control showing 'Page 1 of 1' and a 'Size: 100' dropdown. The main interface has a breadcrumb trail: 'Promotion editor > Conflicting promotions > Support > Products > Finance > Customer reports > **Linked promotions**'. There are 'Save' and 'Revert' buttons. The main content area is split into two columns: 'Available promotions ↑' (left) and 'Linked promotions' (right). Between these columns are four blue buttons: '>', '>>', '<', and '<<'. The 'Available promotions' and 'Linked promotions' columns are currently empty.