

Maintaining Assortments

This guide shows you how to maintain Assortments in effectmanager.



In effectmanager, there are many advantages to maintaining Assortments.

Below we will go through the different fields related to Assortments in effectmanager and why to maintain them.

But first, some of the advantages of using the assortment list:

- Internally you are provided with an overview of your customer's assortment in total or across the retail chains and you only need to maintain this in one place - in effectmanager.
- Externally you can provide your customers with an overview of the products listed with them. If you use the Assortment Code, they can even see in which assortments they are listed.
- [The Assortment List Report](#) for internal use: will provide you with an overview base on; chain, category, product, or assortment code. This report is very useful for both KAM and the Field Force. For Field Force, it is easy to follow up with their stores if they have the correct assortment if you use Assortment Codes in effectmanager.
- [The Assortment List Report](#) for external use: The KAM can easily and quickly send the buyers a presentable overview of their assortment when requested.

Maintain Customer Assortments

You maintain the Assortment in *Settings* under *Products - Retail Chain Units*. You can do this [in effectmanager](#) or by [using an Excel-file](#).

Below we will go through the fields related to the Assortments in effectmanager and the advantages of using these fields.

Assortment Code

Using the Assortment Code will provide you with an extra filtering option when loading the Assortment List Report.

👍 Pro tip - Internally use for your Field Force: This can show your Field Force if a product is listed in a Small, Medium, or Large assortment with a Retail Chain. You can also use it to inform them that it is only a seasonal product. This information is very useful for your Sales Reps when visiting the stores - They can make sure that the store has the correct assortment agreed with the buyers or inform the store that a product is only seasonal.

Retail chain units					
+ Add ✎ Edit — Remove 🔄 Reload 📄 Import 📄 Export					
Retail Chain	External No.	Assortment Code	Assortment Start Date	Assortment End Date	Active
SuperBrugsen		Medium, Large			<input checked="" type="checkbox"/>
DagligBrugsen		Small			<input checked="" type="checkbox"/>
EuroSpar					<input checked="" type="checkbox"/>
SuperBest					<input checked="" type="checkbox"/>
Irma					<input checked="" type="checkbox"/>
Lovbjerg					<input checked="" type="checkbox"/>
KwikSpar					<input checked="" type="checkbox"/>
Netto		Christmas			<input checked="" type="checkbox"/>

Assortment Start and End Date

Using the fields Assortment Start Date and Assortment End Date are for creating the [Assortment List Report](#) in effectmanager.

The field Assortment Start Date must be filled out to add a product to the Assortment List.

The field Assortment End Date is nice to fill out for you to keep track of the product listing with each Retail Chain. It is especially useful with seasonal listings.

👍 Pro tip: Using the Assortment Start and End date in effectmanager you will only need to maintain your Assortment in one place. Saving you time and providing you with the opportunity to create an Assortment in just 1 minute.

Retail chain units					
+ Add ✎ Edit — Remove 🔄 Reload 📄 Import 📄 Export					
Retail Chain	External No.	Assortment Code ↓	Assortment Start Date	Assortment End Date	Active
DagligBrugsen		Small			<input checked="" type="checkbox"/>
SuperBrugsen		Medium, Large	04/01/2020		<input checked="" type="checkbox"/>
Netto		Christmas	11/01/2020	12/31/2020	<input checked="" type="checkbox"/>
Bilka	1382503	A-B-C, 0, Large	01/01/2020	12/31/2020	<input checked="" type="checkbox"/>
Kvickly			01/01/2019		<input checked="" type="checkbox"/>
SuperSpar					<input checked="" type="checkbox"/>
Føtex					<input checked="" type="checkbox"/>
LokalBrugsen					<input checked="" type="checkbox"/>
Rema1000					<input checked="" type="checkbox"/>
Fakta					<input checked="" type="checkbox"/>

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