

How to manually create Units - front end

This guide shows you how to create Colli, Pallet, and Mix-Pallet Units in the effectmanager front end.



In effectmanager Colli, Pallet, and Mix-Pallet Units consists of 3 elements and are created following the same steps.

- Adding the unit
- Adding chains to unit
- Adding prices to unit

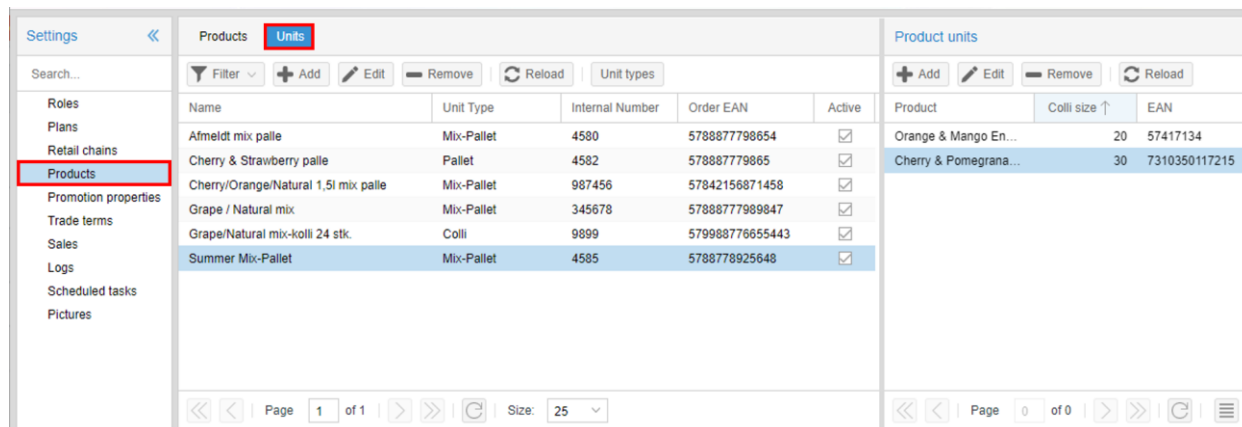
Units can be created directly in the effectmanager front end, or they can be created using an export/import file.

If you need a guide that shows you how to create units in effectmanager using an excel import, please see our guide [How to manually create units - export file](#)

Adding the unit

Go to settings and in the sidebar menu press *Products*.

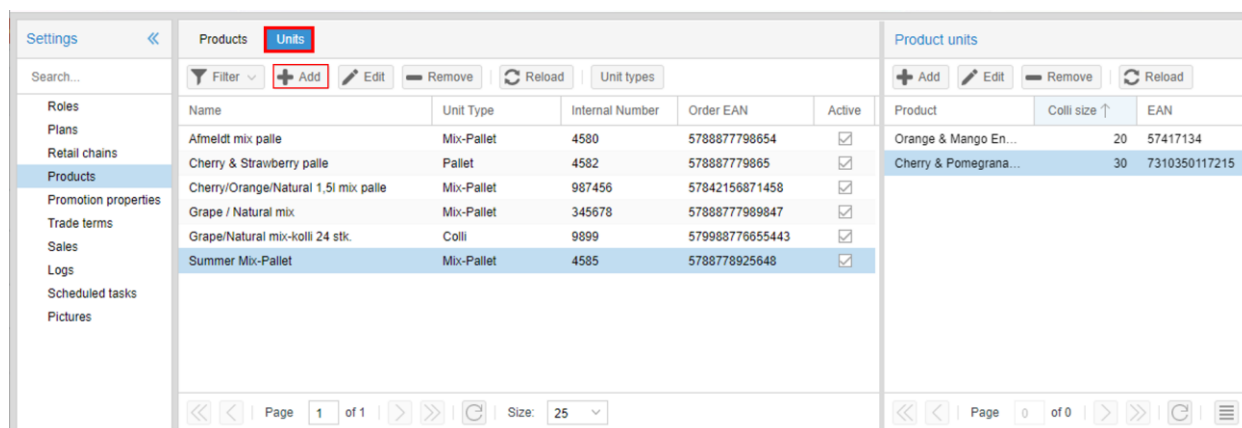
1. To create a new unit in the effectmanager front end press *Units* tab in *Products Settings*.



The screenshot shows the 'Products Settings' interface. The 'Units' tab is selected in the top navigation bar. The 'Add' button is highlighted with a red box. The main content area displays a table of existing units.

Name	Unit Type	Internal Number	Order EAN	Active
Afmeldt mix palle	Mix-Pallet	4580	5788877798654	<input checked="" type="checkbox"/>
Cherry & Strawberry palle	Pallet	4582	578887779865	<input checked="" type="checkbox"/>
Cherry/Orange/Natural 1,5l mix palle	Mix-Pallet	987456	57842156871458	<input checked="" type="checkbox"/>
Grape / Natural mix	Mix-Pallet	345678	57888777989847	<input checked="" type="checkbox"/>
Grape/Natural mix-kolli 24 stk.	Colli	9899	579988776655443	<input checked="" type="checkbox"/>
Summer Mix-Pallet	Mix-Pallet	4585	5788778925648	<input checked="" type="checkbox"/>

2. In the Units tab, press *Add*.



This screenshot is identical to the previous one, showing the 'Units' tab selected and the 'Add' button highlighted with a red box.

3. In the pop-up window input, your unit master data mark it as active and finish by pressing *Save*.

Unit Type: Select the unit type from the drop-down menu.

The unit type is mandatory.

Name: Fill out the name of the unit. The unit name is mandatory.

Internal Number: Fill out if you have an internal number.

Order EAN: Fill out if you have an order EAN.

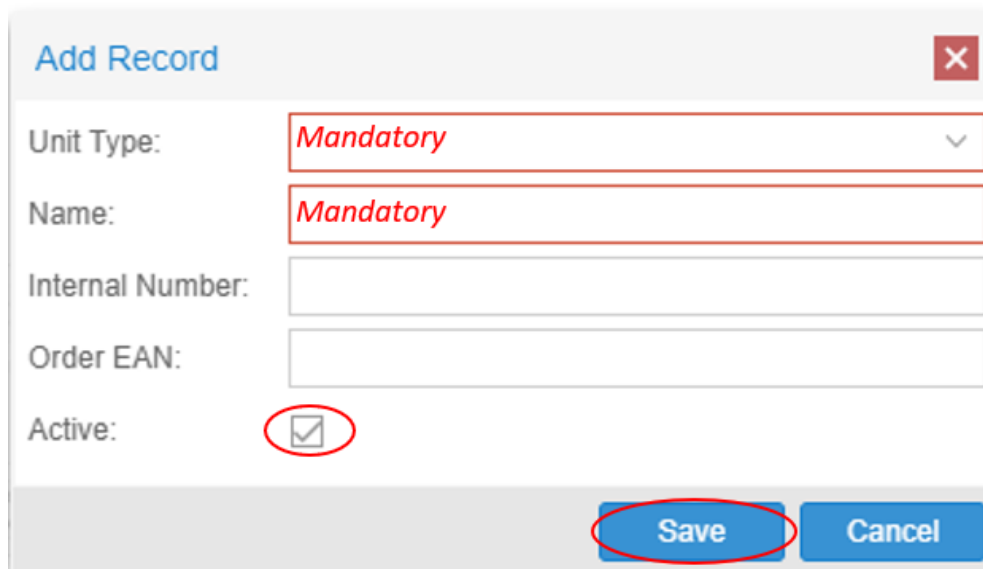
3. In the pop-up window input, your unit master data mark it as active and finish by pressing *Save*.

Unit Type: Select the unit type from the drop-down menu. The unit type is mandatory.

Name: Fill out the name of the unit. The unit name is mandatory.

Internal Number: Fill out if you have an internal number.

Order EAN: Fill out if you have an order EAN.



Add Record [X]

Unit Type: *Mandatory* ▾

Name: *Mandatory*

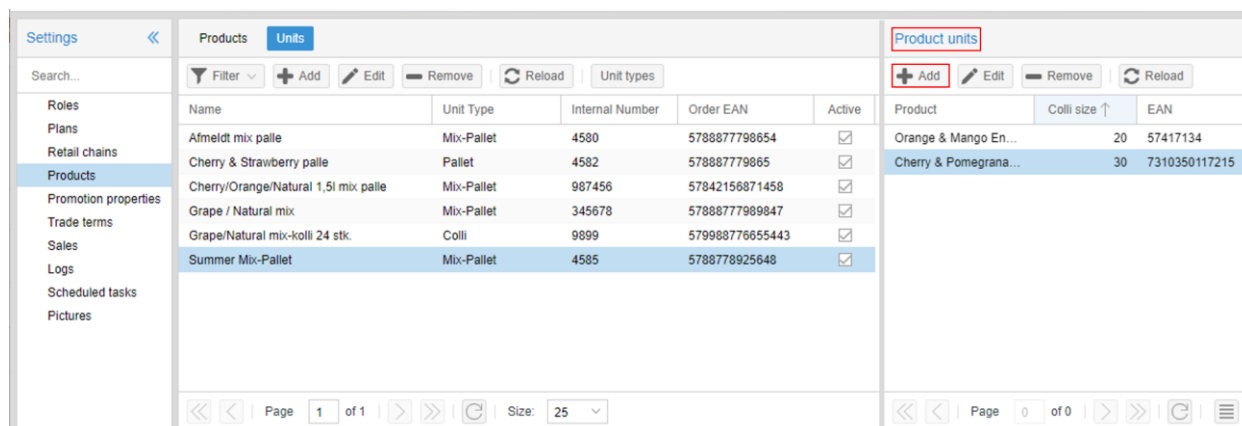
Internal Number:

Order EAN:

Active:

[Save] [Cancel]

4. Your unit is now created, and you can now add product(s) to the unit. Navigate to the right-side window *Product Units* and press *Add*.



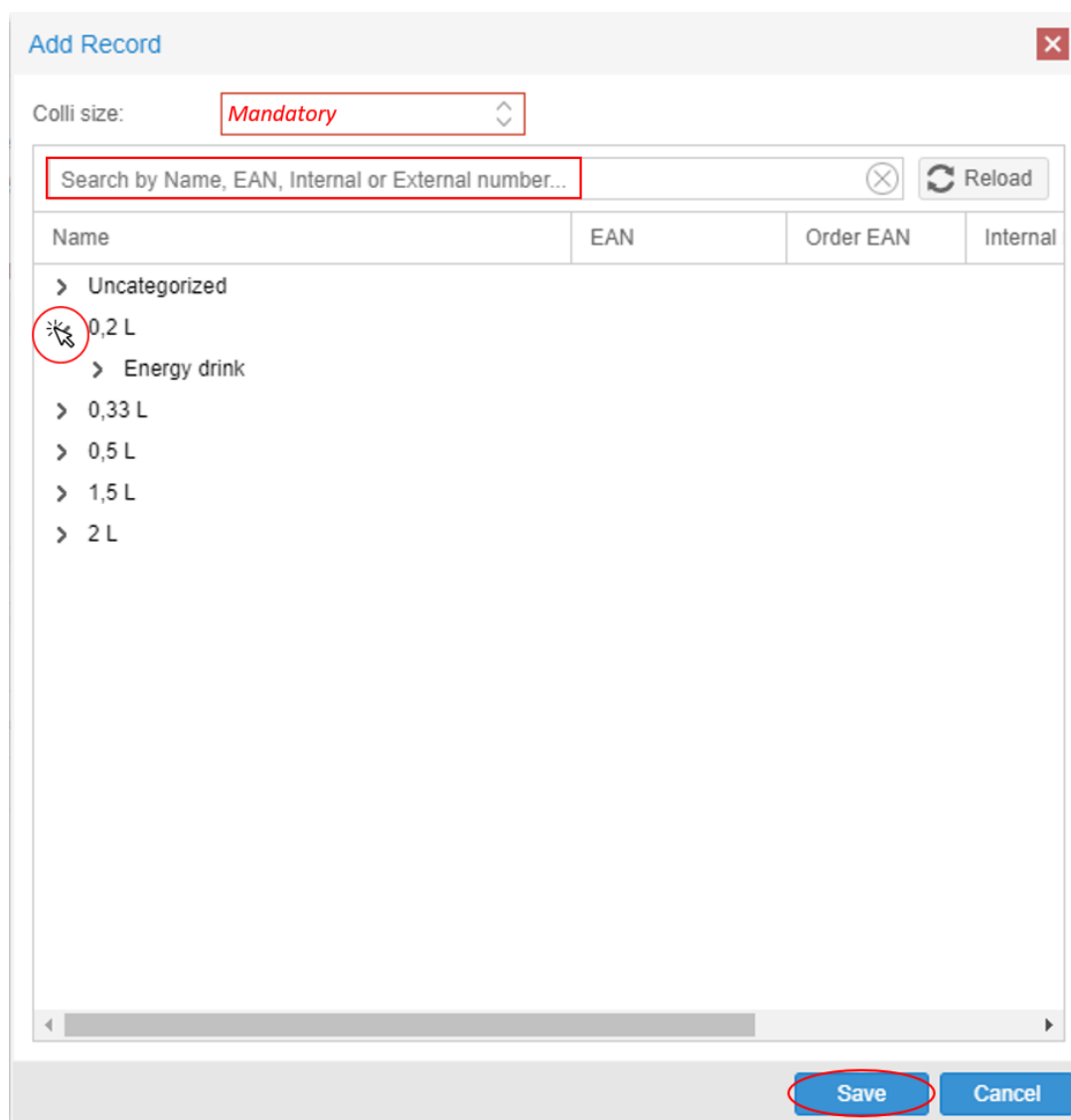
Units						Product units		
Name	Unit Type	Internal Number	Order EAN	Active	Product	Colli size ↑	EAN	
Afmeidtd mix palle	Mix-Pallet	4580	5788877798654	<input checked="" type="checkbox"/>	Orange & Mango En...	20	57417134	
Cherry & Strawberry palle	Pallet	4582	578887779865	<input checked="" type="checkbox"/>	Cherry & Pomegrana...	30	7310350117215	
Cherry/Orange/Natural 1,5l mix palle	Mix-Pallet	987456	57842156871458	<input checked="" type="checkbox"/>				
Grape / Natural mix	Mix-Pallet	345678	57888777989847	<input checked="" type="checkbox"/>				
Grape/Natural mix-kolli 24 stk.	Colli	9899	579988776655443	<input checked="" type="checkbox"/>				
Summer Mix-Pallet	Mix-Pallet	4585	5788778925648	<input checked="" type="checkbox"/>				

5. In the pop-up window, you can now find and add products to the unit. You can add one product at a time. For Mix-pallets repeat this, until you have added all products.

Add Products: You can find products by category or by searching.

Colli Size: Is the number of consumer units of the specific product on the unit.

⚠ OBS! For Pallet and Colli units, you must only add ONE product.



Colli size: Mandatory

Search by Name, EAN, Internal or External number... X Reload

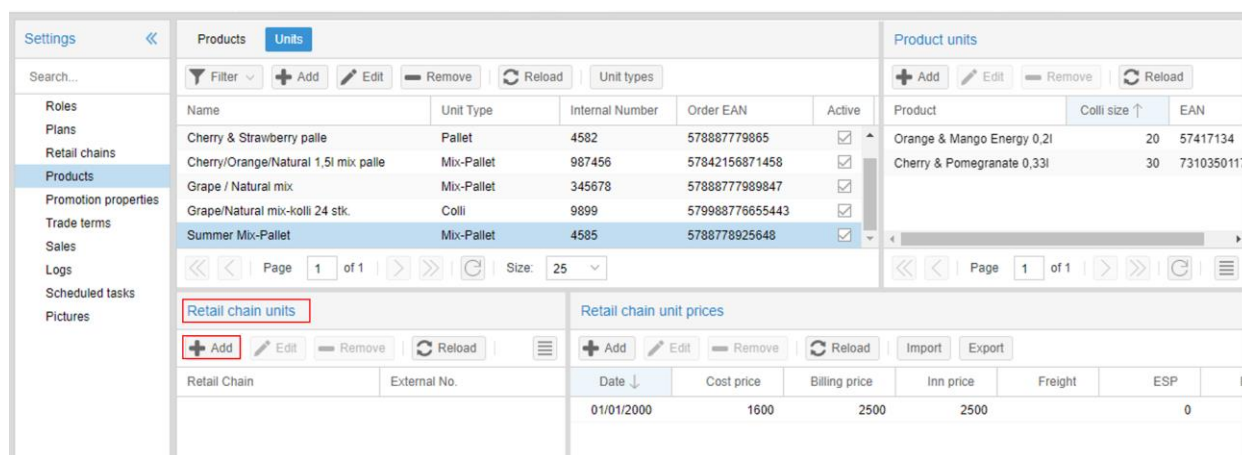
Name	EAN	Order EAN	Internal
> Uncategorized			
✖ 0,2 L			
> Energy drink			
> 0,33 L			
> 0,5 L			
> 1,5 L			
> 2 L			

Save Cancel

Adding Retail Chains

6. After creating a unit, you need to add chain(s) to it. Select the unit you want to add chain(s) to. In the window go to *Retail chain units* and press *Add*.

Repeat until all desired chains have been created on the unit or use the export/import file. The steps for adding chains to units are the same as for adding chains to products.

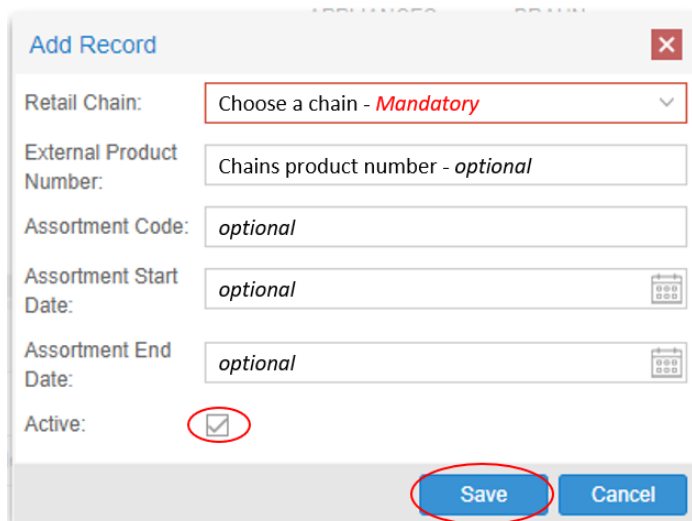


Name	Unit Type	Internal Number	Order EAN	Active
Cherry & Strawberry palle	Pallet	4582	57888779865	<input checked="" type="checkbox"/>
Cherry/Orange/Natural 1,5l mix palle	Mix-Pallet	987456	57842156871458	<input checked="" type="checkbox"/>
Grape / Natural mix	Mix-Pallet	345678	5788877989847	<input checked="" type="checkbox"/>
Grape/Natural mix-kolli 24 stk.	Colli	9899	579988776655443	<input checked="" type="checkbox"/>
Summer Mix-Pallet	Mix-Pallet	4585	5788778925648	<input checked="" type="checkbox"/>

Date ↓	Cost price	Billing price	Inn price	Freight	ESP
01/01/2000	1600	2500	2500		0

7. In a pop-up window, put in the chain information, select *Active*, and press *Save*.

The fields *External Product Number*, *Assortment Code*, *Assortment Start Date*, and *Assortment End Date* are optional and can be filled in if you want to use these.



Add Record

Retail Chain: Choose a chain - *Mandatory*

External Product Number: Chains product number - *optional*

Assortment Code: *optional*

Assortment Start Date: *optional*

Assortment End Date: *optional*

Active:

Save **Cancel**

Adding Prices

8. After adding chains to the unit(s), you need to add prices. In the window, mark the chain you want to add a price too. Go to *Retail chain unit prices* and press *Add*.

Retail chain units				Retail chain unit prices					
Retail Chain	External No.	Assortment Code	Assortment Start Date	Date ↓	Cost price	Billing price	Inn price	Freight	
Bilka	23698	Summer	05/01/2019	01/01/2000	0	0	0	0	

9. In a pop-up window, put in the price information, and finish by pressing *Save*.

Repeat until all prices have been created on the added chains or use the export/import file.

The steps for adding prices to chains using the export/import file are the same as for adding prices to products.

Add Record ✕

Date: Price valid from date - *Mandatory*

Cost price:

Billing price:

Inn price:

Freight:

ESP:

ESP Promotion:

VAT:

Default unit cost:

Default percentage cost:

Elasticity:

List Price:

Tax:

If you need to add prices for multiple chains, you can use the export/import file, please see our guide [How to manually create products - Retail Prices export file](#)

Price Definitions in effectmanager

- **Cost price:** The price of manufacturing or ordering the products possibly with freight costs, tariffs, and insurance. The price is excl. VAT per unit.
- **Billing price:** The wholesaler's purchase price at the manufacturer incl. various costs, such as freight, etc. The price is excl. VAT per unit.
- **Inn price:** The chain's purchase price at the manufacturer incl. various costs, such as freight, etc. The price is excl. VAT per unit.
- **ESP:** The chain's sales price to consumers incl. VAT per unit.
- **ESP Promotion:** The chain's promotion sales price to consumers incl. VAT per unit.
- **VAT:** The VAT - default is 25%. Select another value, if VAT is different from 25%.
- **Default unit cost:** The amount given by the vendor to the chain per consumer unit sold in connection with promotions. Unit costs are only registered on the product if it applies to all promotions. Specified excl. VAT per sales unit.
- **Default percentage cost:** The percentage amount of the billing price given by the supplier to the chain per sold consumer unit in connection with promotions. Default percentage costs are only registered on the product if it applies to all promotions.
- **Elasticity:** Enter price elasticity if you have calculated these, otherwise enter 1.

You upload the OK Plus POS files on your unique effectmanager website.

`https://YOURCOMPANY.effectmanager.dk`

Log in with your username and password and go to *POS files upload*.

After the upload, you receive an email confirmation for the upload. If the file is unsuccessful, you need to act on the errors listed in the email.

For a detailed description on how to upload POS data to the front end, please see our guide [How to upload POS data on effectmanager](#).

⚠ OBS! Before you use the export file, please make sure that your values for categorization are created in effectmanager.

👍 Pro tip: To get sales out, your promotion must have a completed stage.