

How to upload Sales Inn

This guide shows you how to upload sales inn figures in effectmanager.

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



The advantage of uploading sales inn to effectmanager is that it gives you the possibility to evaluate the expected sales in vs. actual sales inn on promotions in order to improve the forecast accuracy. Sales inn are normally exported from your ERP system or other planning tools.

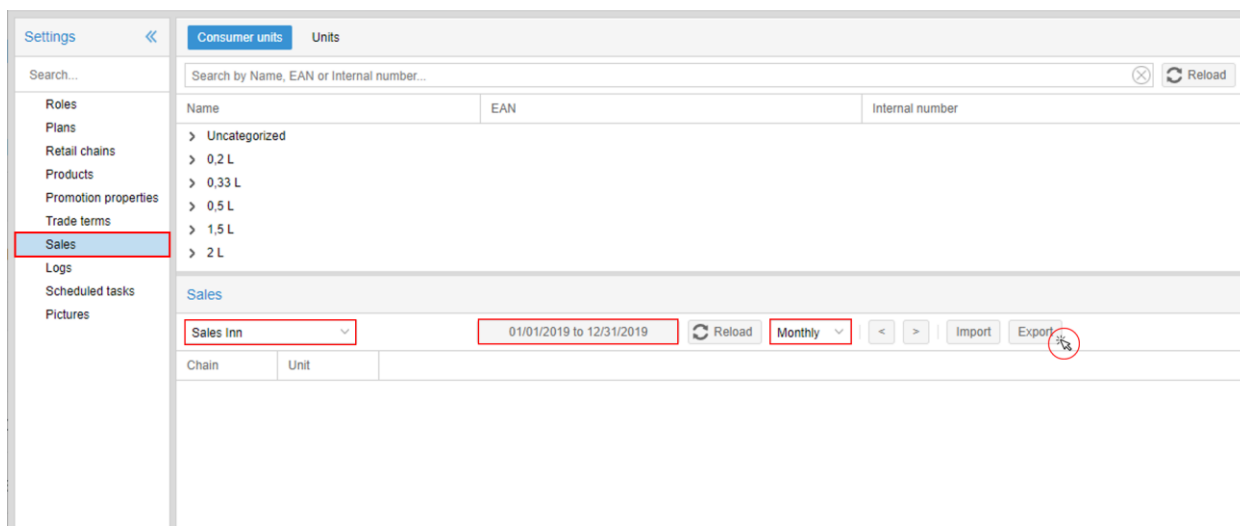
Importing Sales Inn

Go to settings in effectmanager, in the sidebar menu press *Sales*.

In the top window, you see your Consumer Units and Units, and in the bottom window is a sales table.

1. In the sales tables window, select the following and finish by pressing *Export*.

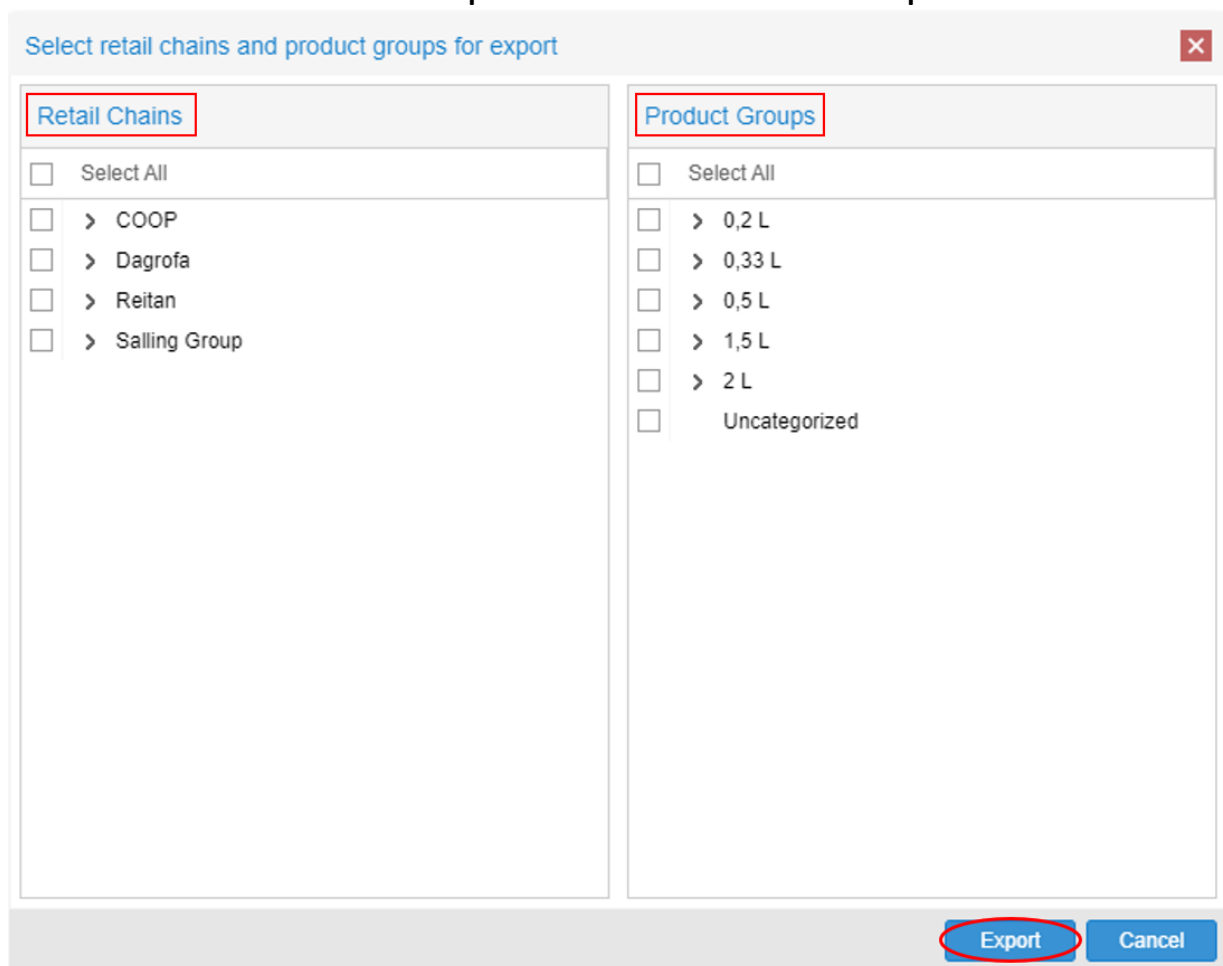
- Sales Inn
- Period
- Level of the export (Daily, Weekly, Monthly, Yearly)



The screenshot shows the 'Settings' page for 'Consumer units' and 'Units'. The 'Sales' menu item is highlighted in the left sidebar. The main content area shows a search bar and a list of units. Below the list, the 'Sales' section is visible, with the following settings: 'Sales Inn' (selected), '01/01/2019 to 12/31/2019' (date range), 'Monthly' (frequency), and 'Export' (button). The 'Export' button is circled in red.

2. In a pop-up window, select the Chain(s) and Product Group(s) you wish to export, finish by pressing *Export*.
If nothing is selected, effectmanager will export all chains and all product groups.

NB! The Sales file is exported on a chain and product level.



Select retail chains and product groups for export

Retail Chains	Product Groups
<input type="checkbox"/> Select All	<input type="checkbox"/> Select All
<input type="checkbox"/> > COOP	<input type="checkbox"/> > 0,2 L
<input type="checkbox"/> > Dagrofa	<input type="checkbox"/> > 0,33 L
<input type="checkbox"/> > Reitan	<input type="checkbox"/> > 0,5 L
<input type="checkbox"/> > Salling Group	<input type="checkbox"/> > 1,5 L
	<input type="checkbox"/> > 2 L
	<input type="checkbox"/> Uncategorized

Export Cancel

3. In the Excel file, the first three lines will indicate the type of export, the exported period and what level.

NB! Do not make corrections to these fields.

Description of columns are found on the next page.

When importing the sales file, column J and onward must be filled out with your Sales Inn.

A – Chainid: NEVER make corrections to this field. Unique code for the retail chain.

C – Unitid: NEVER make corrections to this field. Unique code for your unit.

	A	B	C	D
1	Type	SalesInn		
2	Timestamp	01/01/2019 12/31/2019		
3	Mode	Monthly		
4	Chainid	ChainName	Unitid	UnitName
5	9c64e41a-bcde-45e7-bc84-9abed47b0015	Bilka	c6f07fbf-7887-4e9e-b15b-120889462255	Natural 1,5l
6	9c64e41a-bcde-45e7-bc84-9abed47b0015	Bilka	165efaba-410f-4d16-987b-1486daa02a63	Cherry & Pomegranate 0,5l
7	9c64e41a-bcde-45e7-bc84-9abed47b0015	Bilka	aaee32b1-0ad5-4260-8671-26ca6cdf57b	Orange & Guava 1,5l
8	9c64e41a-bcde-45e7-bc84-9abed47b0015	Bilka	5ac3e38e-2245-48f1-940c-2ef411ec872e	Coca-Cola
9	9c64e41a-bcde-45e7-bc84-9abed47b0015	Bilka	5f07ee2-8f40-44cb-0864-4a7c6dc268	Natural C + 1,5l
10	9c64e41a-bcde-45e7-bc84-9abed47b0015	Bilka	4f19353ca37	Raspberry & Apple 0,5l
11	9c64e41a-bcde-45e7-bc84-9abed47b0015	Bilka	208c4e772	Natural C + 0,5l
12	9c64e41a-bcde-45e7-bc84-9abed47b0015	Bilka	858c51d3b8	Strawberry & Kiwi 0,33l
13	9c64e41a-bcde-45e7-bc84-9abed47b0015	Bilka	a320788d-9e6f-4604-ba6e-7b1974567a3f	Strawberry & Kiwi 0,33l
14	9c64e41a-bcde-45e7-bc84-9abed47b0015	Bilka	17f04718-032b-4cf1-8f61-816afd73b3e2	Orange & Guava 0,33l
15	9c64e41a-bcde-45e7-bc84-9abed47b0015	Bilka	2b066513-2c28-47ad-acfd-923bc9d033d2	Lime & Elder flower 0,33l
16	9c64e41a-bcde-45e7-bc84-9abed47b0015	Bilka	378106ea-ce29-4cb9-9a55-a053af5047ba	Lime & Elder flower 1,5l
17	9c64e41a-bcde-45e7-bc84-9abed47b0015	Bilka	014214c9-be6a-44aa-846f-a0c02b563476	Grape & Elder flower 0,5l
18	9c64e41a-bcde-45e7-bc84-9abed47b0015	Bilka	8183c2a5-220c-42c2-a2ca-a49e9bcfeb78	Orange & Mango Energy 0,2l
19	9c64e41a-bcde-45e7-bc84-9abed47b0015	Bilka	7d5dca25-4d8a-47ae-826e-a4d700b3c3d5	Coke Minus Minus

B – ChainName: The chain(s) selected in your export.

D – UnitName: Your unit description name.

E – EAN: Consumer Unit EAN. *Obligatory*

G – ExternalNumber: Unit number from the wholesaler.

I – Active: Product status
Active = TRUE
Inactive = FALSE

	E	F	G	H	I	J	K	L	M
1									
2									
3									
4	EAN	InternalNumber	ExternalNumber	CustomerNumber	Active	01/2019	02/2019	03/2019	04/2019
5	7310350117413		1373502	00008	TRUE	0	0	0	0
6	7310350117208		1373503	00008	TRUE	0	0	0	0
7	7310350117024	557722	1373504	00008	TRUE	0	0	0	0
8	9c64e41a-bcde-45e7-bc84-9abed47b0015		1373505	00008	TRUE	0	0	0	0
9	7310350117178		1382501	00008	TRUE	0	0	0	0
10	7310350116805		1382502	00008	TRUE	0	0	0	0
11	7310350117123		1382503	00008	TRUE	0	0	0	0
12	7310350117123		1382504	00008	TRUE	0	0	0	0
13	5700417990202		1373501	00008	TRUE	0	0	0	0
14	7310350117178	876543	1382501	00008	TRUE	0	0	0	0
15	7310350116805		1382502	00008	TRUE	0	0	0	0
16	5700417006804	543219	1382503	00008	TRUE	0	0	0	0
17	7310350117123	147258	1382504	00008	TRUE	0	0	0	0
18	57417134	658923	1382505	00008	TRUE	0	0	0	0
19	5788877745635	4577	1382507	00008	TRUE	0	0	0	0

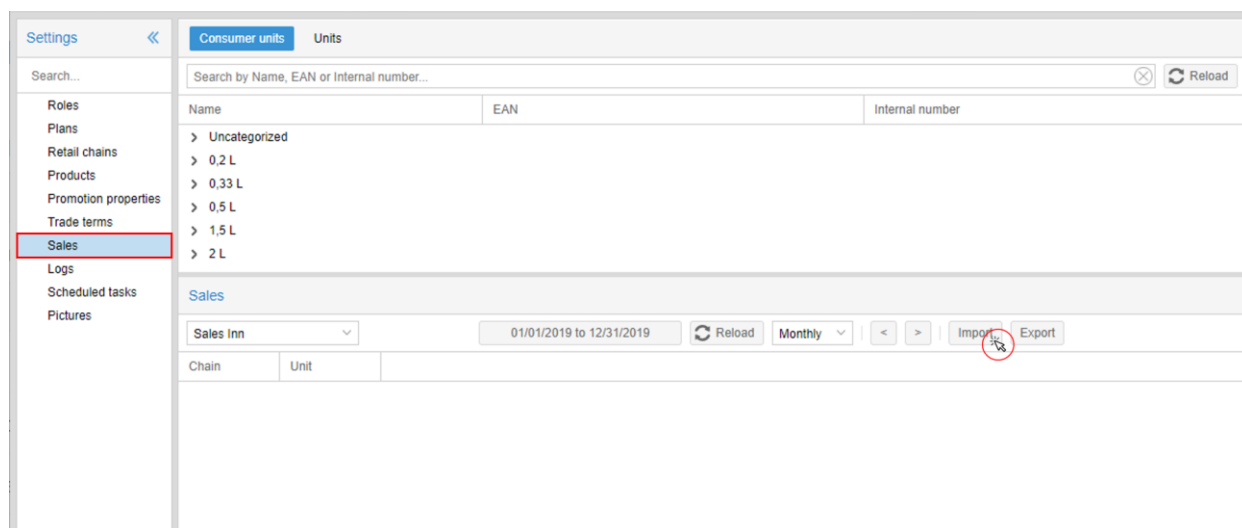
F – InternalNumber: Consumer Unit Internal Number.

H – CustomerNumber: The Retail Chains internal number.

J – : The period exported will be visible from column J and onward.

4. When you have filled out your Sales file save it and import it to effectmanager.

In the sales tables window, press *Import*.



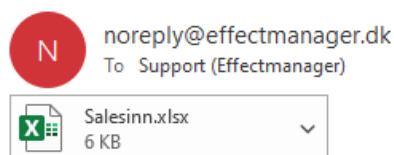
5. In the pop-up window, find your file by pressing *Browse* and then press *Upload*.

A new pop-up informs you that the import has started.

6. When the import has completed, you will receive an email notification.

Your Sales Inn is now imported to effectmanager. When you import a new Sales file, we recommend that you update the affected promotions with the newest sales figures.

SalesInn import successful



SalesInn import triggered for file: Salesinn.xlsx succeeded

Import status: (25 out of 25 entries were imported).

Attached you can find the imported file.

Best regards,
Effectmanager Team