

How to use Timeperiod KPI reports in effectmanager

This guide shows you how to use the POS Timeperiod KPI reports in the effectmanager Report module.

This guide is only of relevance if you have the online POS reports module in effectmanager.



The Timeperiod KPI reports offer an overview of POS data from the wholesaler, with your Categories but the wholesaler's Product Name - making it easier for Sales reps to show the chain how a product has performed in their store.

In this report, you can compare Turnover, Sales, and Category on KPIs like index and %share.

The Timeperiod KPI report is available in two different reports. Below we will go through them.

- [Timeperiod KPI Daily](#)
- [Timeperiod KPI Weekly](#)

Timeperiod KPI Daily

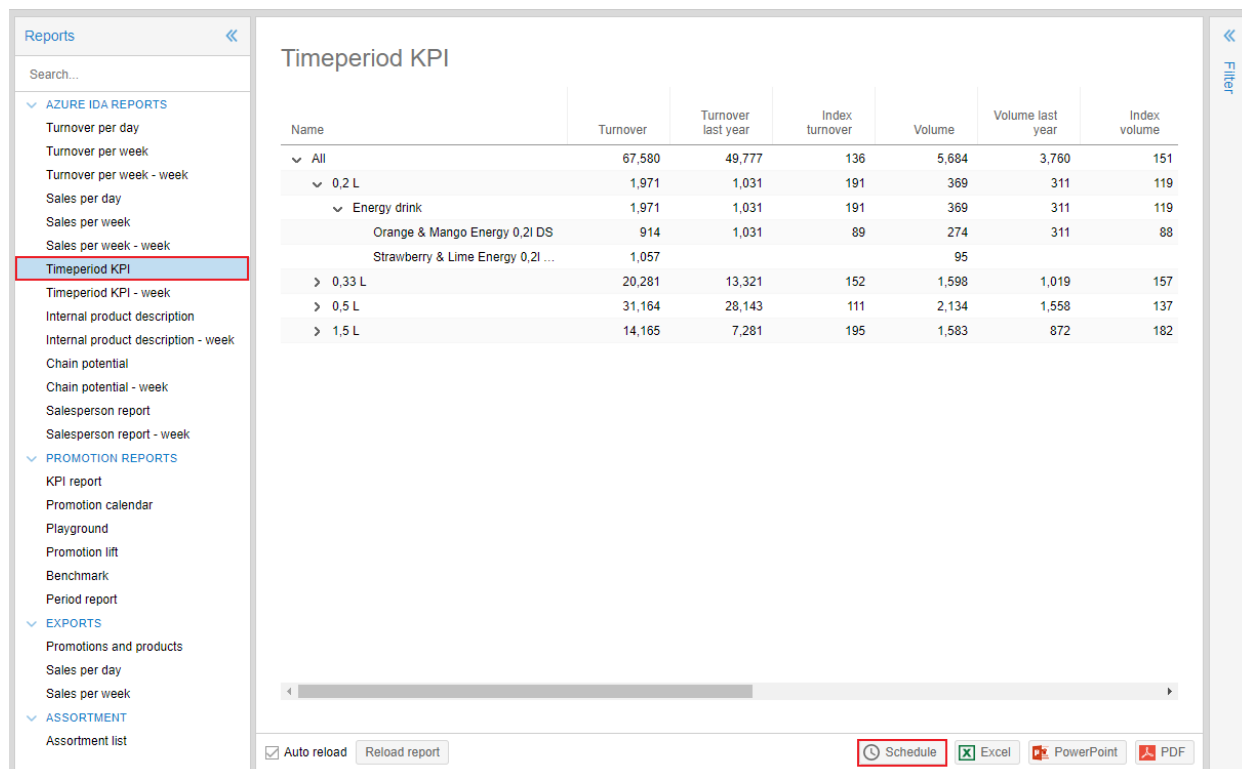
This POS report will provide you with a table report based on your filtering selection compared to the same period last year. The daily report allows you to choose the desired period on **a daily hierarchy**.

Whereas the [Timeperiod KPI - week](#) uses the week hierarchy and will always sum data on a weekly level.

Adding detailed shop filters, you can create the report that you want for your customers with their own product names.

In the example below I have selected in my filters; Salling Group, Bilka and Salesrep Bjarne Pedersen from 01/01-2020 to 18/01/2020 this will provide me with a report with all POS data on Bilka Store visited by Bjarne Pedersens.

The data shown is from 01/01-2020 to 18/01/2020 – as this report uses a day hierarchy.



Name	Turnover	Turnover last year	Index turnover	Volume	Volume last year	Index volume
▼ All	67,580	49,777	136	5,684	3,760	151
▼ 0,2 L	1,971	1,031	191	369	311	119
▼ Energy drink	1,971	1,031	191	369	311	119
Orange & Mango Energy 0,2l DS	914	1,031	89	274	311	88
Strawberry & Lime Energy 0,2l ...	1,057			95		
> 0,33 L	20,281	13,321	152	1,598	1,019	157
> 0,5 L	31,164	28,143	111	2,134	1,558	137
> 1,5 L	14,165	7,281	195	1,583	872	182

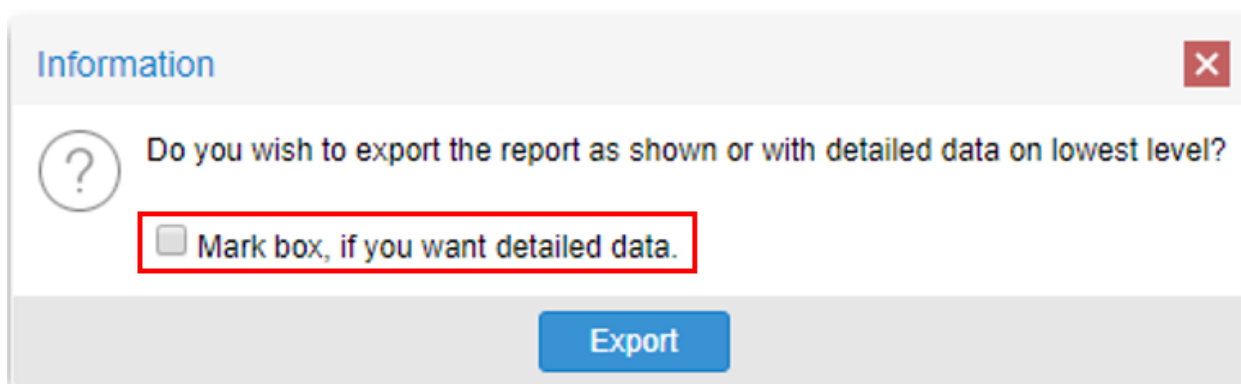
You also have the option to Schedule Reports for send-out to yourself, your Sales reps or others. For example, if you use the dynamic filter, you can select Last Week and schedule a report for Bjarne to be sent to him before he visits his stores.

If you need a guide that show you how to schedule reports in effectmanager, please see our guide [How to schedule a task/report in effectmanager](#)

All Chain potential reports can be exported to Excel, PowerPoint, and PDF by pressing the icons at the bottom of the report.

NB! Exporting to PowerPoint you will be asked if you want to export detailed data?

Checking the box will expand all rows to the lowest level in the exported file.



Information ✕

Do you wish to export the report as shown or with detailed data on lowest level?

Mark box, if you want detailed data.

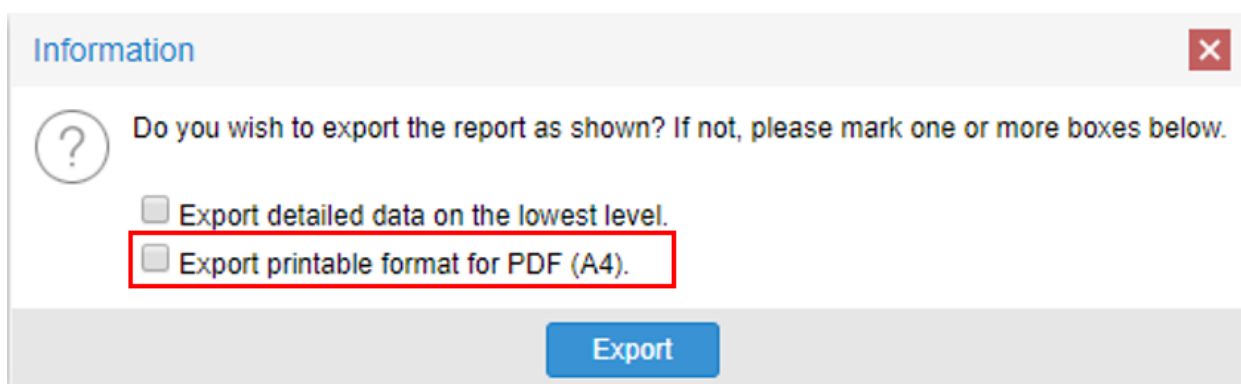
Export

NB! Exporting to PDF you will be asked if you want to export detailed data?

Checking the box will open up all rows to the lowest level in the exported file.

When exporting to PDF you will be asked if you want a printable PDF (A4)?

Checking this box will limit the number of columns exported if not all columns can fit in the PDF.



Information ✕

Do you wish to export the report as shown? If not, please mark one or more boxes below.

Export detailed data on the lowest level.

Export printable format for PDF (A4).

Export

Timeperiod KPI Weekly

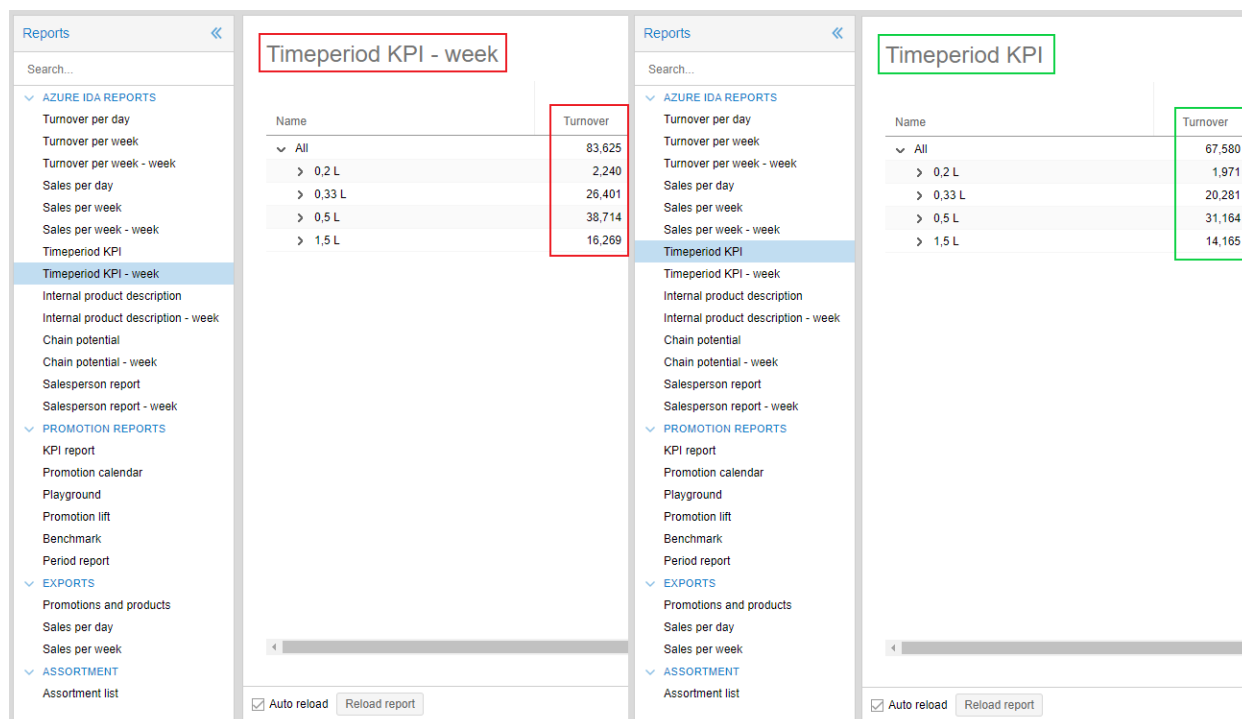
This POS report will provide you with a table report based on your filtering selection compared to the same period last year.

The report **uses the week hierarchy and will always sum data on a full week.**

Whereas the [Timeperiod KPI daily](#) allows you to select the period based on a daily period hierarchy.

In the example below I have selected Salling Group, Bilka. and Salesrep Bjarne Pedersen- from 01/01-2020 to 18/01/2020. Using the weekly hierarchy I will get a report from 30/12-2019 to 19/01/2020 (week52-week 3).

Try comparing Turnover Key Figures for the two reports with the same period selected - this illustrates that **the week report always shows data for full weeks.**



Name	Turnover
▼ All	83,625
> 0,2 L	2,240
> 0,33 L	26,401
> 0,5 L	38,714
> 1,5 L	16,269

Name	Turnover
▼ All	67,580
> 0,2 L	1,971
> 0,33 L	20,281
> 0,5 L	31,164
> 1,5 L	14,165