

# Promotion's Customer Proposal report

This guide shows you where to find a promotion proposal report for your customers.

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



When you have planned your promotion and want to send your customer an overview of a specific promotion, effectmanager have a Proposal Report in the Promotion Editor.

In the Promotion's Proposal report, the customer gets a summary of the promotion finance and calculations on each product on the promotion.


You can export the Proposal report in three different formats; Excel, PDF, and PowerPoint.

*If you need a guide that shows you how the KPIs used in the proposal report is calculated, please see our guide [KPI calculations - Sales Out](#) or [KPI Calculations - Sales Inn](#)*

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


Proposal   Result
Print   Excel   PowerPoint   PDF

**Promotion proposal**



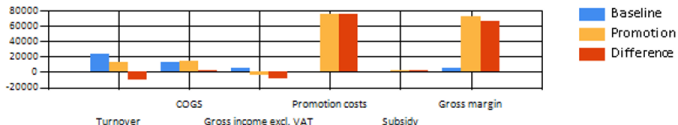
Promotion name: Birthday Promotion  
 Promotion mechanism: Buy 1.00 get 1.00 Free  
 Customer comment:

Chain: Bilka  
 Start: 9/2/2019  
 End: 9/8/2019






**Summary**

Finance	Baseline	Promotion	Difference
Turnover incl. VAT	23,655	13,134	-10,521
COGS excl. VAT	13,075	14,510	1,435
Gross income excl. VAT	5,849	-4,003	-9,852
Promotion costs excl. VAT		75,000	75,000
Subsidy excl. VAT		2,020	2,020
Gross margin excl. VAT	5,849	73,017	67,168



**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 %
Natural 0,5l (Consumer unit)		1392415	7310350116911	11.00	1.00	0 %	10.00	19.00	9.50	-2.40	-32 %	0	425	470	11 %
Cherry & Pomegranate 0,5l (Consumer unit)		1373503	7310350117208	11.00	2.50	0 %	8.50	19.00	9.50	-0.90	-12 %	0	400	440	10 %
Cherry & Strawberry 0,5l (Consumer unit)		1382507	5788877745635	10.00	1.00	0 %	9.00	19.95	9.98	-1.02	-13 %	0	400	450	13 %
<b>Total</b>												<b>0</b>	<b>1,225</b>	<b>1,360</b>	

**Chain comment**

No comments applied

If you need to do further analysis of your promotion, we recommend using the Promotion Reports in the Reports Module in effectmanager or using your Promotion Cube. In the Promotion Cube, you can build your own reports, by using the different key figures.

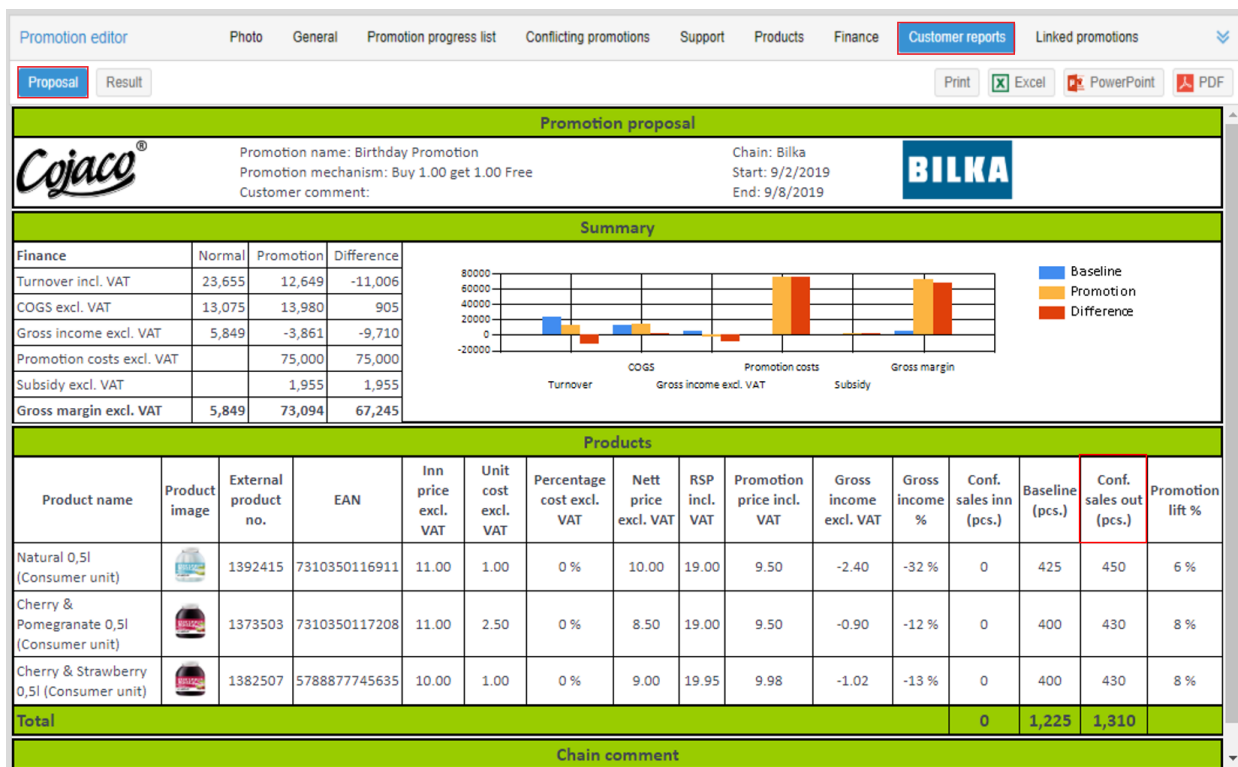
*If you need a guide that shows you how to make a connection to your promotion cube, please see our guide [How to connect to a Promotion cube in Excel](#)*

## **Example of how the stages affect the fields Conf. Sales Out (pcs.) and Conf. Sales Inn (pcs.).**

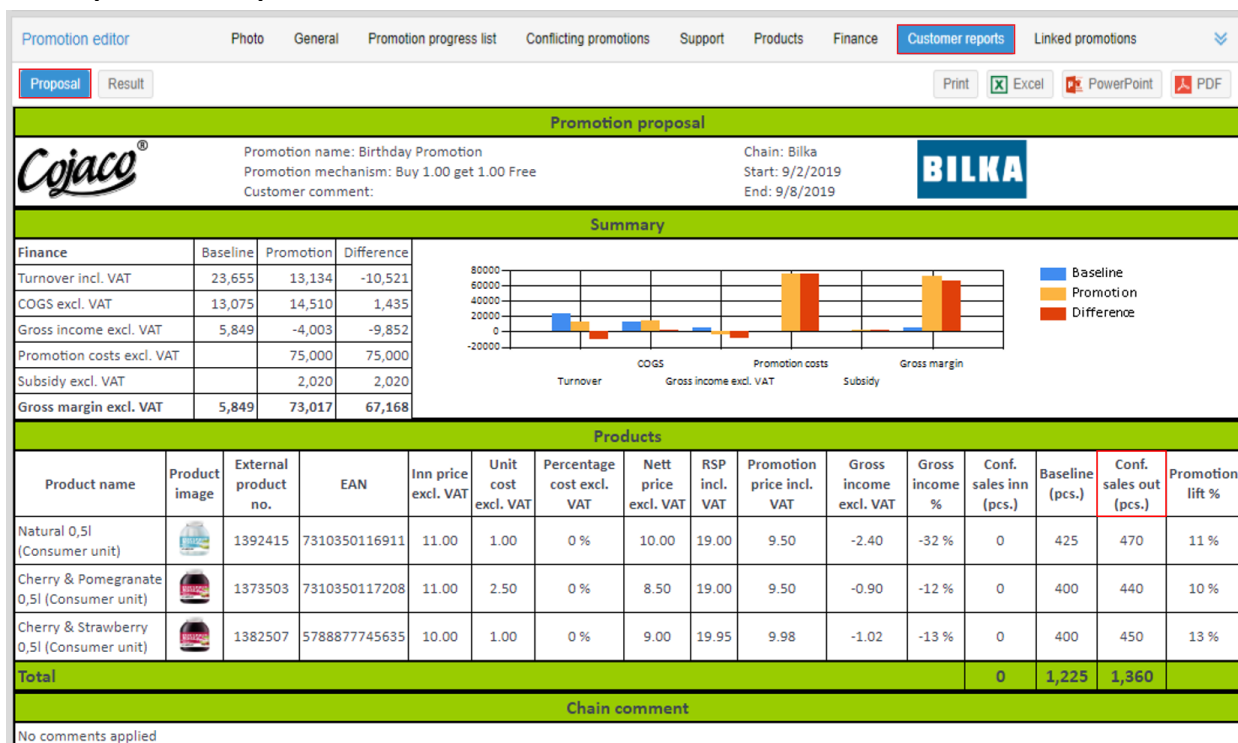
In the Proposal report, the fields Conf. Sales Out (pcs.) and Conf. Sales Inn (pcs.) will show the volumes in the current stage of the promotion. When the promotion is marked as completed, the fields will have volumes from the last stage you made changes to.

You create a promotion, where the subsidy is calculated for Sales Inn.

You input your expected volumes in the field Sales out. In the field Sales out Expected, you can also input the volumes for your internal information. You can now download a proposal report for the customer.



When the customer confirms the promotion, there may be changes to the expected promotion volumes. You now change the stage to confirmed in effectmanager and input the new volumes in Sales out. You can now download a new Proposal report, where the new volumes are used for the



When the promotion is completed, you change the stage of the promotion in effectmanager to completed. The Proposal report will now have key figures from the stage Confirmed. If you need a report for your customer for the completed promotion, please use the Result report found in the Promotion editor.

*If you need a guide for the Result report in Promotion Editor, please see our guide [Promotion's Customer Result report](#)*