How to use Assortment list report in effectmanager

This guide shows you how to use the Assortment list in the effectmanager Report module.

The Assortment list provides you with an overview of an assortment with a given customer. You can determine your Assortment list on Basic filters like Chain, Category, Product, Date and Assortment Code. You can also add Detail filters if you need an overview of a specific categorization.

If you need a guide that shows you how to use filters in effectmanager, please see our guide [How to user filters in effectmanager](#)

👍 **Pro tip:** To see products on the Assortment List they must have an Assortment Start Date. You add this to Product Chain Settings.
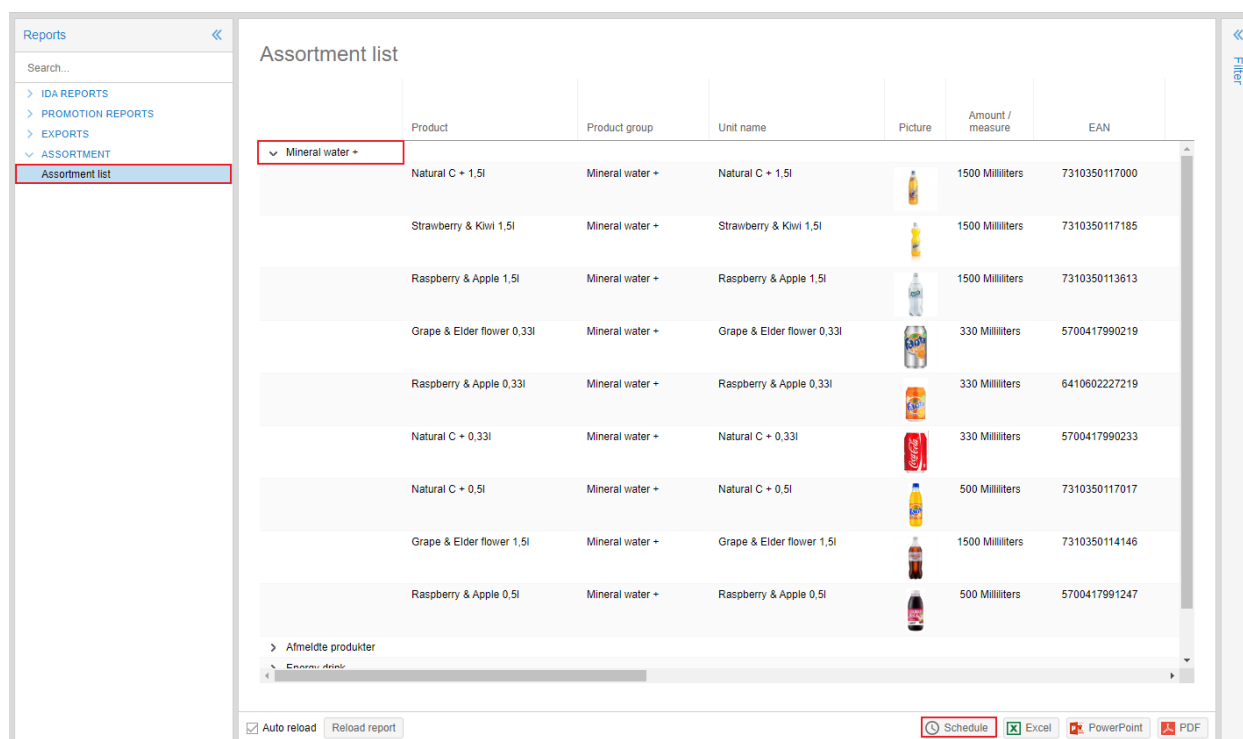
If you need a guide that shows you how to add chains to your products, please see our guide that shows you [How to add Chains in effectmanager](#) *or* [How to add Chains with and Export/import file.](#)

Grouping the Assortment list will provide you with an overview based on either chain, product group or assortment code. In the example below I have loaded a report for Bilka 2020 assortment grouped on Product Group.

The Assortment list includes product information like; Product name, EAN, internal and external number, prices, assortment code, etc.

The information in the Assortment list can be edited using the same functionality as in the Promotion scheduler.

If you need a guide that shows you how to edit column view, please see our guide How to use List View columns in Promotion Scheduler
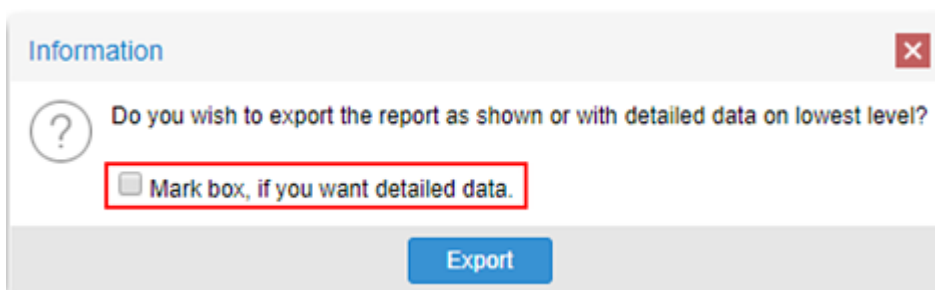

The Assortment list can be scheduled for send-out to yourself, your Sales reps or others who need this.

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

👍 **Pro tip for internal use:** This report is great to use for internal meetings and Sales reps. It provides an overview of an assortment and can be loaded when sales reps are in the store.

👍 **Pro tip for external use:** This report is great to use, in preparation for meeting with buyers or to send to buyers if they want an overview of products listed in a chain.

The Assortment list 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.

NB! Exporting to PDF 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.
When exporting to PDF you will be asked if you want a printable PDF (A4)?
Checking this box shown below will limit the number of columns exported if not all columns can fit in the PDF.

Below you can download examples of the Assortment list from effectmanager. The examples use different filtering and grouping options in the different export formats.

[Assortment List: Chain grouping with columns excluded PDF](#)
[Assortment List: Product Group grouping with all columns Excel](#)