How to use Promotion Overview report in effectmanager
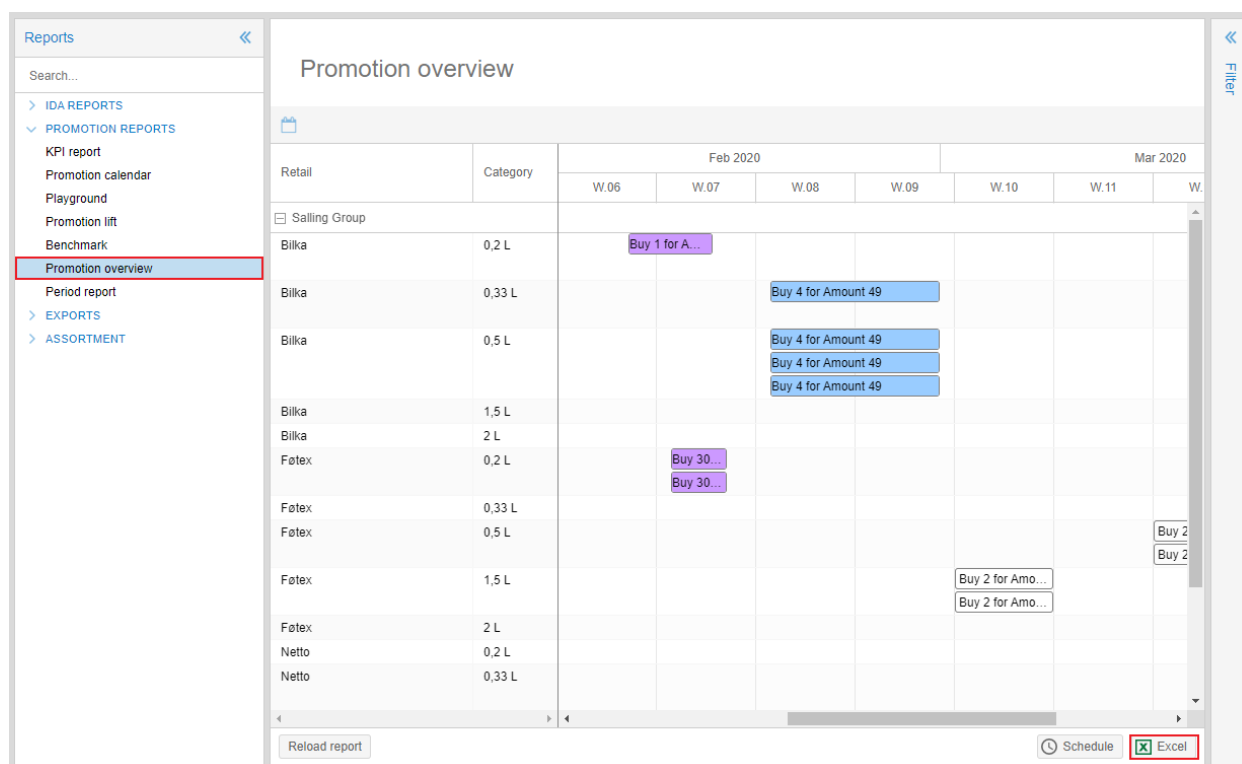
This guide shows you how to use the Promotion Overview report in the effectmanager Report module.

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

The Promotion Overview report provides you with a report in a calendar view based on your filtering selections. If you need a calendar with a list view you can use our Promotion Calendar report.

In effectmanager, placing your mouse on the promotion will show you the promotion number and products on the promotion.
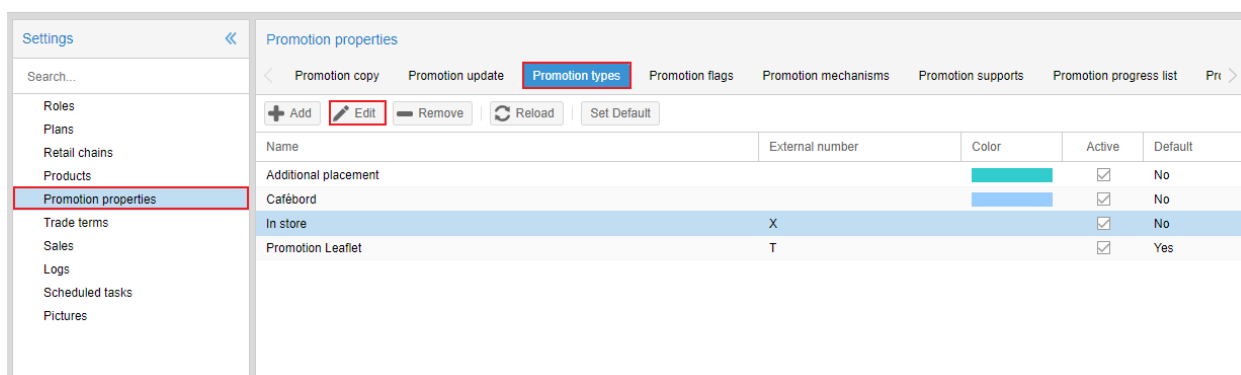

👍 **Pro-tip for the Sales Rep:** This report is very great for your sales reps in their preparation for a sales tour together with the promotion calendar they are very well prepared for any sales tour.

The promotions mechanism will be shown in the overview report, so they can easily show this to the customer.

👍 **Pro-tip for the KAM:** The Promotion Overview is also a great tool for any Key Account Manager, as it provides an overview that can be sent to your customers. This way you can show them all promotion for a period. Filtering on Promotion Stage provides you with an overview of Planned, Confirmed and Completed promotions.

The Promotion Overview report also has the option to color-code your promotions based on promotion type. To color-code promotion with your own color selection in the report, you must add colors to your promotion's types in Promotion Properties under Settings. Select the Promotion Type and press Edit, then the color can be added to the Promotion Type.

NB! If you do not add colors, you will see the colors used in Promotion Scheduler Single View. In the export, the promotions will be without colors.

The promotion Overview report can be exported to Excel and scheduled for send-out.

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