

How to upload Trade Terms

This guide shows you how to upload trade terms to effectmanager.

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



The trade terms are used on every single promotion. This is a percentage number, which is invoiced from the customer at a later stage but has an influence on each individual promotion.

When a trade term is active, the percentage will automatically pop up on each future promotion.

Uploading new Trade Terms, will not affect the promotions already created in effectmanager. To add new trade terms to an already existing promotion, you will need to import it.

If you need a guide that shows you how to update Trade Terms on already existing promotions and where you can view the trade terms, please see our guide [How to update promotions Trade Terms](#)

Trade Term Definitions

End of Period Discount

- A percentage discount on chain level
- This discount is set per chain and the discount is added to all products on the promotions in the period.

Calculation =

$$([\text{Billing Price, or Promotion invoice price} > 0] * [\text{End of Period Discount \%}]) * ([\text{Sales In or Sales Out}] - [\text{Returned Volumes}])$$

Additional Discount on Invoice Price

- A percentage discount on chain level – and can also be on product group level.
- This discount is set per chain, but you can add product groups so not all products on the promotion is added this discount in the period.

Calculation =

$$([\text{Billing Price, or Promotion invoice price} > 0] * [\text{Additional Discount on Invoice price \%}]) * ([\text{Sales In or Sales Out}] - [\text{Returned Volumes}])$$

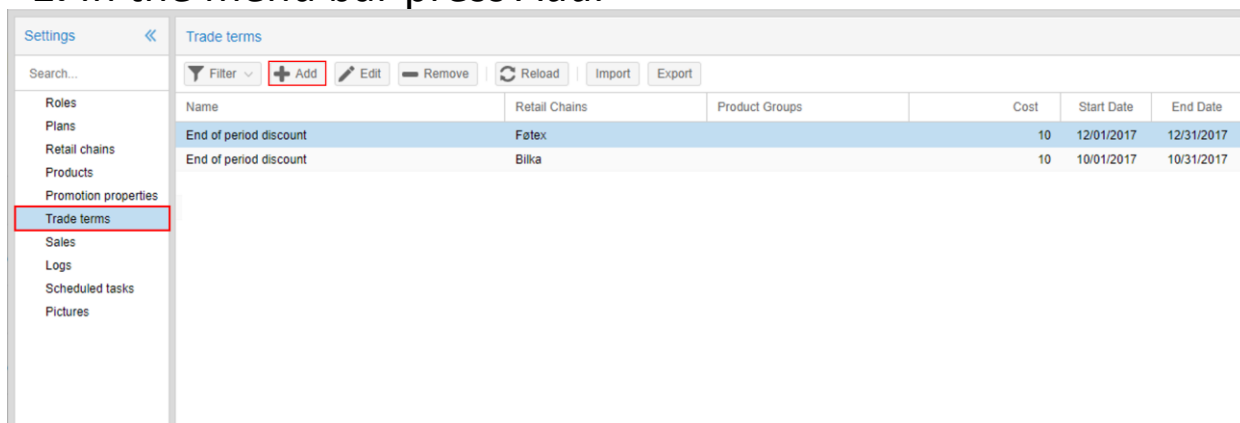
In this article, we will go through how to add Trade Terms to effectmanager.

- [Add Trade Term](#)
- [Upload Trade Term](#)
- [Edit Trade Term](#)

Add Trade Terms in effectmanager

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

1. In the menu bar press *Add*.



2. In the pop-up window, add your trade term and finish by clicking *Save*.

- **Name:** Select between End of period discount or Additional discount on invoice price.
- **Cost:** Cost in number format - effectmanager will use this as the percentage cost.
- **Cost:** Cost in number format - effectmanager will use this as the percentage cost.
- **Start/End Date:** Select the period the trade term is active.
- **Retail Chains:** You can only add Retail Chain if you add the Trade Term End of period discount or Additional discount on invoice price.
- **Product Groups:** You can only select Product Group if you add Additional discount on invoice price.

Add Record
✕

Name:

Cost:

Start Date:

End Date:

Retail Chains:

Product Groups:

⚠ OBS! When adding a new Trade Term existing Trade Term periods will be overwritten by the new period. This applies to both prolonging and shortening the period the Trade Term is active.

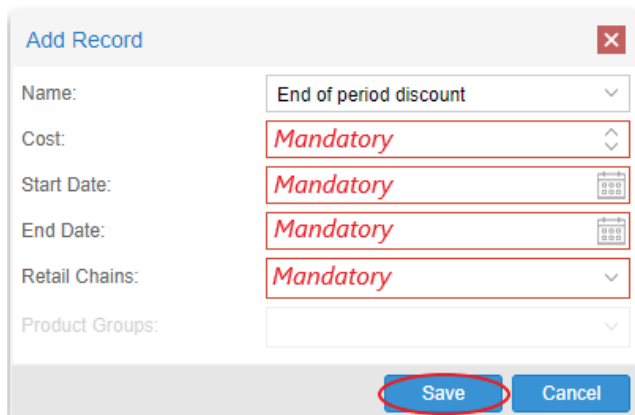
Prolonging Trade Term:

Existing trade term period: 05/01/2020 - 05/31/2020
 Imported trade term period: 05/01/2020 - 06/30/2020
 The final trade term period: 05/01/2020 - 06/30/2020

Shortening Trade Term:

Existing trade term period: 05/01/2020 - 06/30/2020
 Imported trade term period: 05/01/2020 - 05/31/2020
 The final trade term period: 05/01/2020 - 05/31/2020

2.A Add End of period discount - mandatory fields



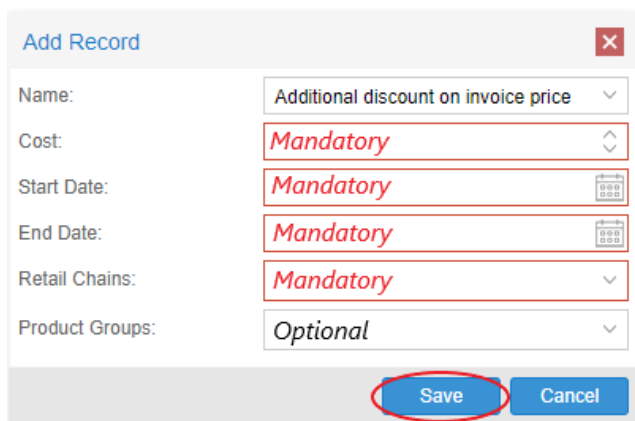
The screenshot shows a dialog box titled 'Add Record' with a close button (X) in the top right corner. The fields are as follows:

- Name: End of period discount (dropdown menu)
- Cost: Mandatory (dropdown menu)
- Start Date: Mandatory (calendar icon)
- End Date: Mandatory (calendar icon)
- Retail Chains: Mandatory (dropdown menu)
- Product Groups: (empty dropdown menu)

At the bottom, there are two buttons: 'Save' (circled in red) and 'Cancel'.

2.B Add Additional discount on invoice price - mandatory fields

⚠ OBS! You can only select one product group per the creation of a record. This is because we check across product groups when adding a record for Trade Terms



The screenshot shows a dialog box titled 'Add Record' with a close button (X) in the top right corner. The fields are as follows:

- Name: Additional discount on invoice price (dropdown menu)
- Cost: Mandatory (dropdown menu)
- Start Date: Mandatory (calendar icon)
- End Date: Mandatory (calendar icon)
- Retail Chains: Mandatory (dropdown menu)
- Product Groups: Optional (dropdown menu)

At the bottom, there are two buttons: 'Save' (circled in red) and 'Cancel'.

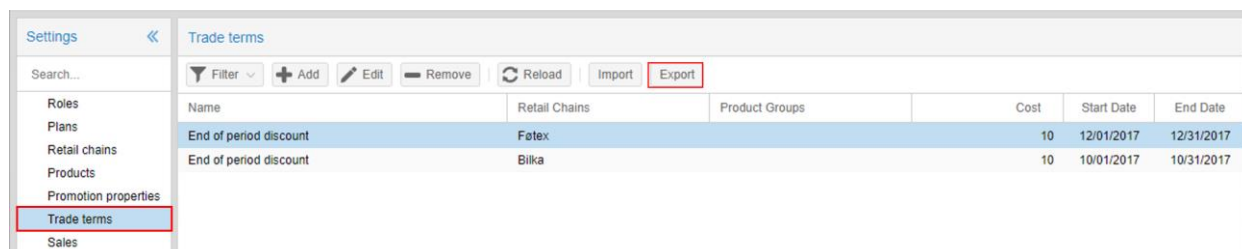
If you need a guide that shows you how the trade terms are used in the promotion finance, please see our guides [KPI Calculations Sales In](#) or [KPI Calculations Sales Out](#)

Upload Trade Term in effectmanager

If you want to add trade terms to multiple chains, we recommend using the export/import functionality.

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

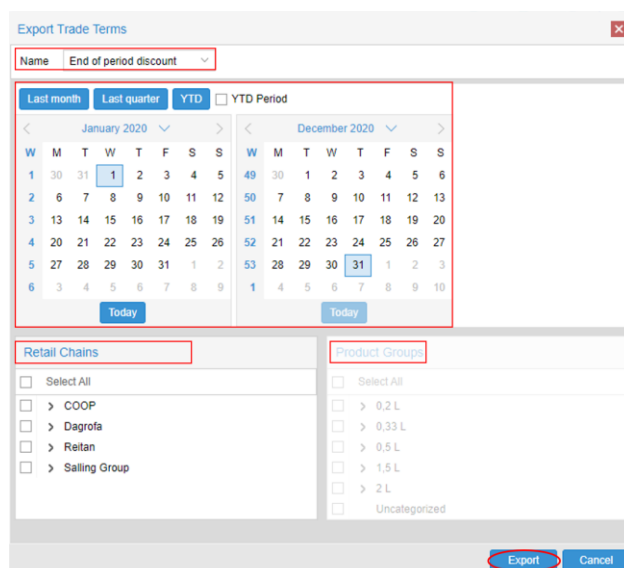
3. In the menu bar press *Export*.



4. In the pop-up window, select the type of Term you wish to export, the period, and the Retail Chain(s). Finish by pressing *Export*.

NB! You can only export trade terms on Product Groups if you export the trade term Additional discount on invoice price. You can export on both Retail Chain and Product Group.

NB! You can only export trade terms on Retail Chains and not Product Group if you export the Trade Term End of period discount.



⚠ OBS! When adding a new Trade Term existing Trade Term periods will be overwritten by the new period. This applies to both prolonging and shortening the period the Trade Term is active.

Prolonging Trade Term:

Existing trade term period: 05/01/2020 - 05/31/2020
 Imported trade term period: 05/01/2020 - 06/30/2020
 The final trade term period: 05/01/2020 - 06/30/2020

Shortening Trade Term:

Existing trade term period: 05/01/2020 - 06/30/2020
 Imported trade term period: 05/01/2020 - 05/31/2020
 The final trade term period: 05/01/2020 - 05/31/2020

5. In the exported file, the two different types of Trade Terms in effectmanager use different fields in the file.

The number format accepted in the exported file (column F - Cost) is decimal numbers with a comma.

The date format accepted in the exported file (columns G - StartDate to H - EndDate) is a date with a dash separator.

5.A The End of period discount file uses the following fields in the exported file. The fields marked with red are mandatory. The rest cannot be used for this trade term.

NB! You can only export Trade Terms on Retail Chains and not Product Group if you export the Trade Term End of period discount.

- Fields A, B, C, G, and H are pre-filled based on your filtering options in the export.
- Field F (Cost) must be filled out.
- You can make corrections to the mandatory fields before uploading the file.

	A	B	C	D	E	F	G	H
1	Name	RetailChainInternalNumber	RetailChainName	ProductGroupInternalNumber	ProductGroupName	Cost	StartDate	EndDate
2	End of period discount	00007	Føtex			10	01-01-2020	31-12-2020
3	End of period discount	00008	Bilka			5	01-01-2020	31-12-2020
4								
5								
6								

5.C The Additional Discount on Invoice Price file uses the following fields in the exported file. The fields marked with red are mandatory. The rest are optional for this trade term.

- Fields A, D, E, G, and H are pre-filled based on your filtering options in the export.
- Field F (Cost) must be filled out.
- You can make corrections to the mandatory fields before uploading the file.

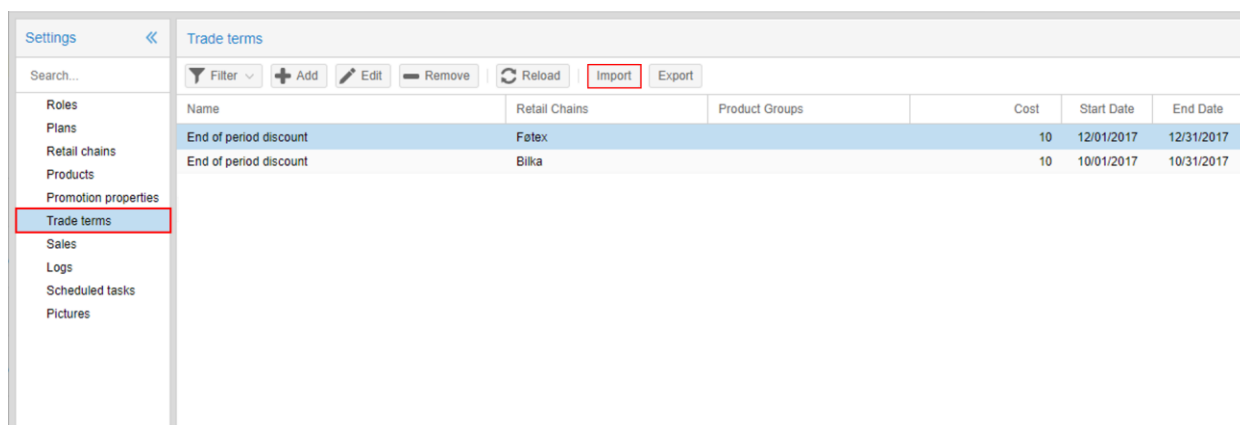
NB! You can only export Trade Terms on both Retail Chains and Product Group if you export the Additional discount on invoice price.

⚠ OBS! For Trade Term Additional discount on invoice price, you can only import one product group per file. This is because we check across product groups when importing the file.

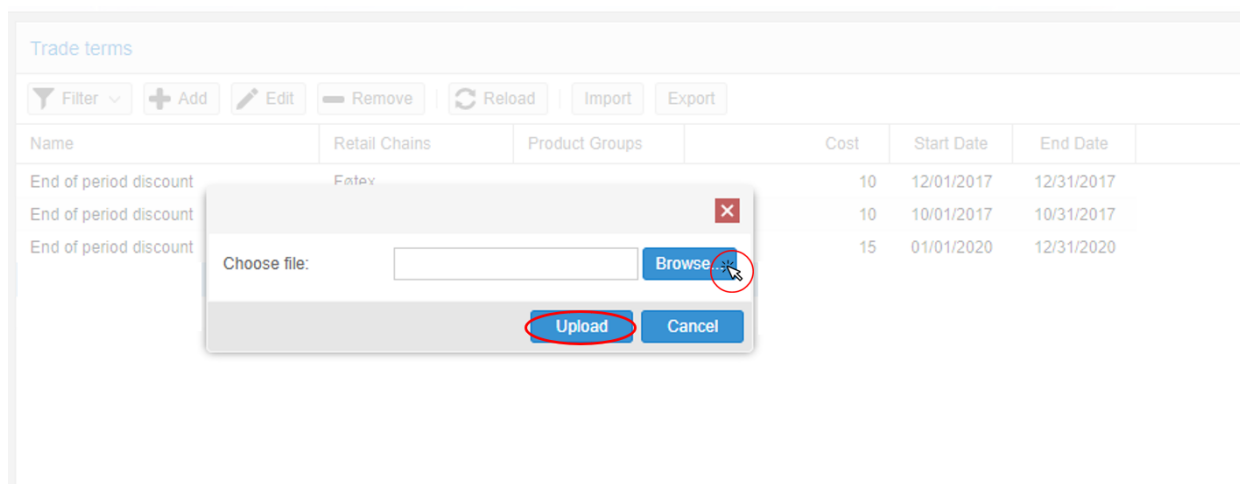
	A	B	C	D	E	F	G	H
1	Name	RetailChainInternalNumber	RetailChainName	ProductGroupInternalNumber	ProductGroupName	Cost	StartDate	EndDate
2	Additional discount on invoice price	00007	Føtex	Coconut water	Coconut water	2,5	03-05-2020	17-05-2020
3	Additional discount on invoice price	00008	Bilka			0,5	03-05-2020	17-05-2020
4								
5								
6								
7								

6. Fill out the exported file with your Trade Term, save it, and upload it to effectmanager.
In the Trade Terms menu bar press *Import*.

! OBS! Your import file can only contain ONE Trade Term per imported file. If you use multiple Trade Terms, they must be in individual files.



7. 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.



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

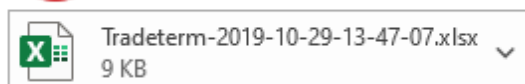
Your Trade Term is now imported to effectmanager. When you import a new trade term, it does not affect already created promotion. We recommend that you update the affected promotions with the newest trade terms.

If you need a guide that shows you how to import the trade terms to your promotions, please see our guide [How to update promotions Trade Terms](#)

Trade term import successful



noreply@effectmanager.dk
To Support (Effectmanager)



Trade term import triggered for file: Tradeterm-2019-10-29-13-47-07.xlsx succeeded

Import status: (2 out of 2 entries were imported).

Import completed. 1 Inserts, 1 Updates

Attached you can find the imported file.

Best regards,
Effectmanager Team

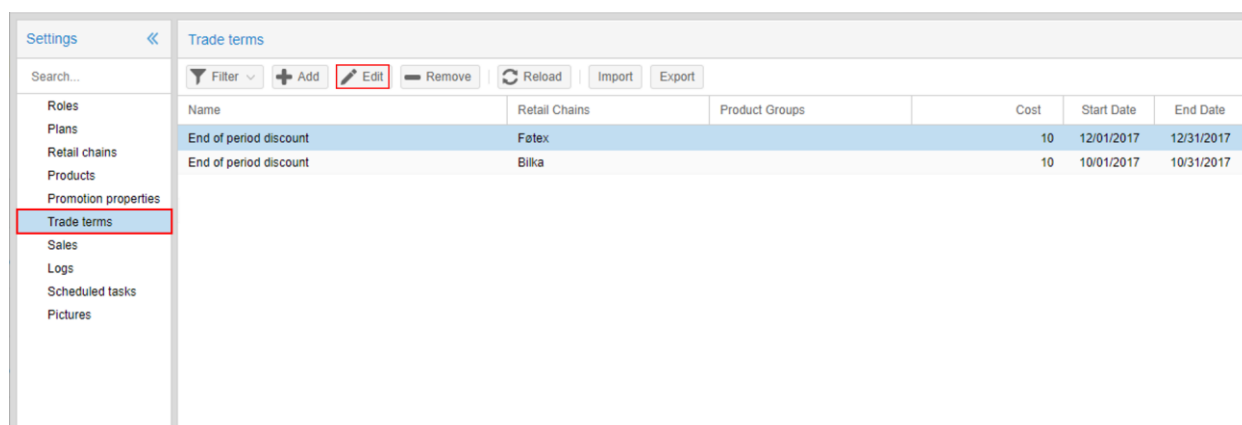
Edit Trade Terms in effectmanager

If you want to edit already added trade terms, you can do this in effectmanager.

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

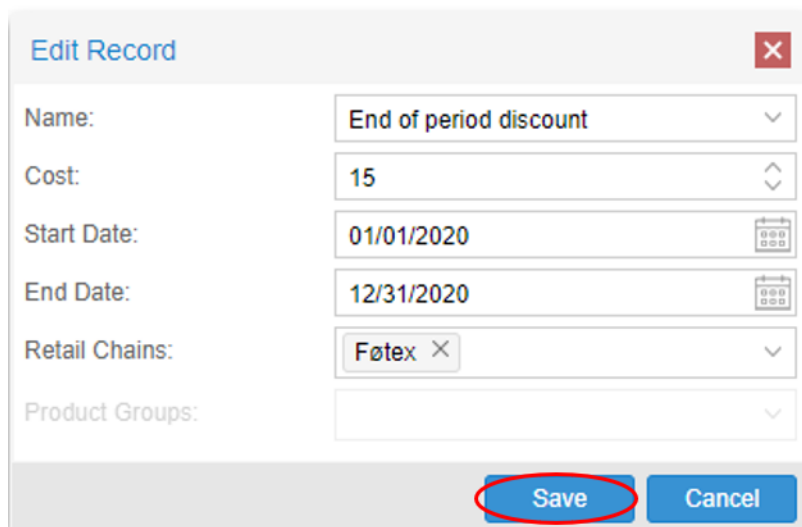
9. Select the Trade Term you want to edit. A trade term is selected, when it has a blue marking.

In the Trade Term menu bar press *Edit*.



Name	Retail Chains	Product Groups	Cost	Start Date	End Date
End of period discount	Føtex		10	12/01/2017	12/31/2017
End of period discount	Bilka		10	10/01/2017	10/31/2017

10. In the pop-up window, edit your Trade Term and finish by pressing *Save*.



Edit Record [Close]

Name: End of period discount [v]

Cost: 15 [^]

Start Date: 01/01/2020 [Calendar]

End Date: 12/31/2020 [Calendar]

Retail Chains: Føtex [x] [v]

Product Groups: [v]

[Save] [Cancel]