

How to use filters in effectmanager

This is a guide that explains how to best use filters in Promotion Scheduler and in the Reports module.



Filters make it easier for you to find the data you are looking for.

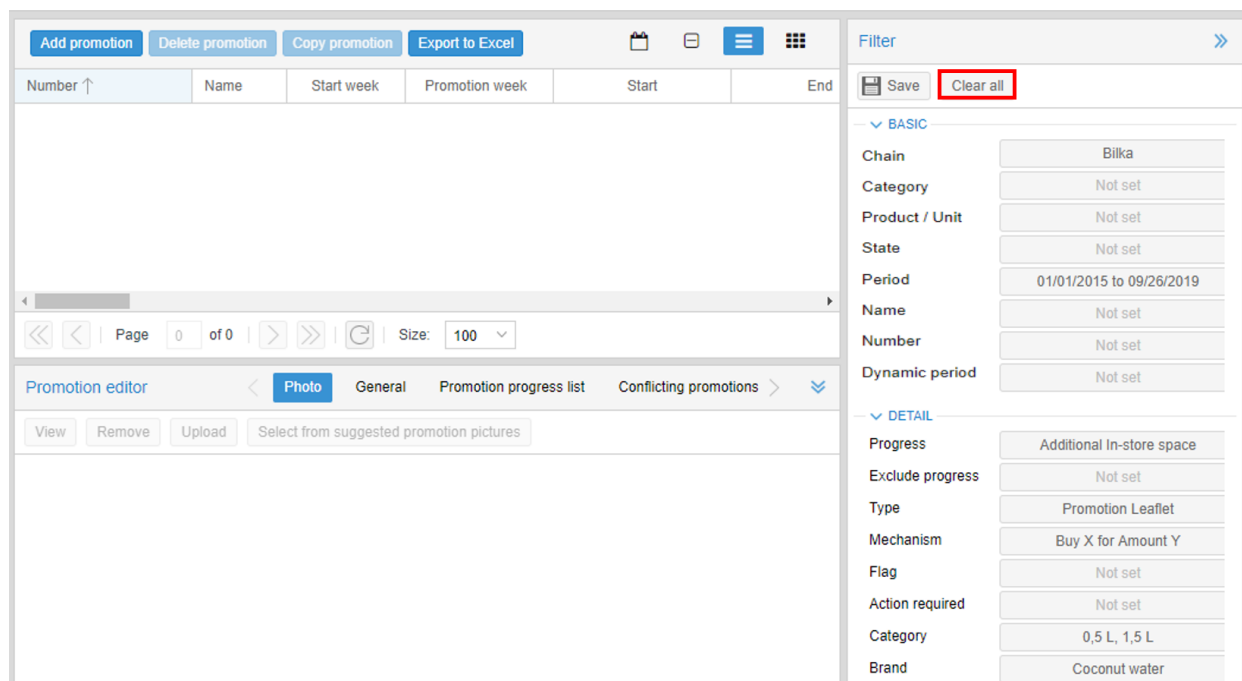
You can filter the data on basic criteria like Chain, Category, Product, Promotion State, Period, and many more.

Below we will go through

- [Promotions filters](#)
- [POS report filters](#)

⚠ OBS! Filters are saved when navigating between the different modules in effectmanager. A filter from Scheduler also applies in Reports. Filters are saved when you log out of effectmanager.

👍 Pro tip: If you are having trouble finding your promotions, make sure to check your filters. Try clearing the filter and input your criteria again.



👍 Pro tip: If you use a filter with criteria regularly, you can save your filter.

Just select your criteria and press *Save*.

You will find your saved filter under *Saved Filters* at the bottom.

The screenshot shows the Effect Manager interface. At the top, there are buttons for 'Add promotion', 'Delete promotion', 'Copy promotion', and 'Export to Excel'. Below these is a table with columns: 'Number ↑', 'Name', 'Start week', 'Promotion week', 'Start', and 'End'. The table is currently empty. To the right of the table is a 'Filter' panel with a 'Save' button (highlighted with a red box) and a 'Clear all' button. Below the 'Filter' panel is a 'Saved filters' section (also highlighted with a red box) which contains a 'Load' button, a 'Remove' button, and a 'Share' button. Below this section, there is a table with columns 'Name', 'Owner', and 'Shared', and a message that says 'There are no stored filters to use.'

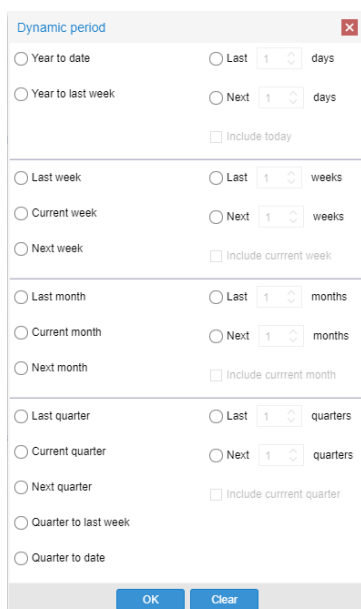
Promotion Filters

When searching for your Promotions in Scheduler or using the Promotion Reports in the Report module, you can use Promotion filters to find the promotions or their key figures.

Below we will go through the different promotion filters. Promotion filters are divided into [basic filters](#) and [detailed filters](#).

Basic Filters

A **period** is always pre-selected in all filters in effectmanager. The period is saved when navigating to the Report module in effectmanager. You also have the option to use a dynamic period. You can select the dynamic period filter by pressing *Dynamic period*.



Chains are one of the most used filters. You can filter on both the wholesaler and chain level. You can filter on multiple chains and on multiple stores across chains. This is a great filter to use if you are looking for an overview of a specific store or chain.

The example below shown in List View provides a perfect overview of promotions in Coop YTD.

Number ↑	Name	Start week	Promotion week	Start	End	Del
Co-190069		2	2	01/08/2019	01/14/2019	
Co-190070		2	2	01/08/2019	01/14/2019	
Co-190071		3	3	01/15/2019	01/21/2019	
Co-190072		3	3	01/15/2019	01/21/2019	
Co-190073		4	4	01/22/2019	01/28/2019	
Co-190074		4	4	01/22/2019	01/29/2019	
Co-190075		4	4	01/24/2019	01/31/2019	
Co-190076		5	5	01/29/2019	02/04/2019	
Co-190077		5	5	02/01/2019	02/05/2019	

Filter	
Chain	COOP
Category	Not set
Product / Unit	Not set
State	Not set
Period	01/01/2019 to 09/02/2019
Name	Not set
Number	Not set
Dynamic period	Not set

Category and Product filters correspond with categories and products created in effectmanager. This filter is great to use if you are looking for promotions within a specific category. The example below shown in List View provides an overview of all promotions in the 1,5 L category with the product Lime & Elder Flower 1,5 L.

Number ↑	Name	Start week	Promotion week	Start	End	Del
Co-190076		5	5	01/29/2019	02/04/2019	
Co-190095		11	11	03/12/2019	03/18/2019	
Co-190096		12	12	03/18/2019	03/24/2019	03
Co-190106		16	16	04/18/2019	04/24/2019	04
Co-190125		27	27	07/01/2019	07/07/2019	06
Co-190130		31	31	07/29/2019	08/04/2019	07
Co-190135		35	35	08/26/2019	09/01/2019	08
Co-190147		17	2019/18	04/26/2019	05/02/2019	04
Co-190148		20	2019/21	05/17/2019	05/23/2019	05

Filter	
Save	Clear all
BASIC	
Chain	Not set
Category	1,5 L
Product / Unit	Lime & Elder flower 1,5l
State	Not set
Period	01/01/2019 to 09/02/2019
Name	Not set
Number	Not set
Dynamic period	Not set
DETAIL	

State equals the state of the promotion; Planned, Confirmed, Completed, Cancelled, or Simulated. This filter is great to use if you need an overview of promotions in a certain state. It can be to see all your confirmed promotions for a specific customer and export them in an Excel-file, so your customer has an overview.

NB! It is important to remember to change the state of your promotions to completed. POS data for promotions are only updated automatically for completed promotions.

The example below shown in List View provides an overview of all planned promotions for Coop in the given period.

Number ↑	Name	Start week	Promotion week	Start	End	Del
Co-190145		25	2019/25	06/17/2019	06/23/2019	06
Co-190146		25	2019/25	06/17/2019	06/23/2019	06
Co-190147		17	2019/18	04/26/2019	05/02/2019	04
Co-190148		20	2019/21	05/17/2019	05/23/2019	05
Co-190150	B2G1F	36	2019/36	09/02/2019	09/08/2019	08

Filter	
Save	Clear all
BASIC	
Chain	COOP
Category	Not set
Product / Unit	Not set
State	Planned
Period	01/01/2019 to 09/02/2019
Name	Not set
Number	Not set
Dynamic period	Not set
DETAIL	

Name and Number filters are great to use if you know which promotions you want to look at.

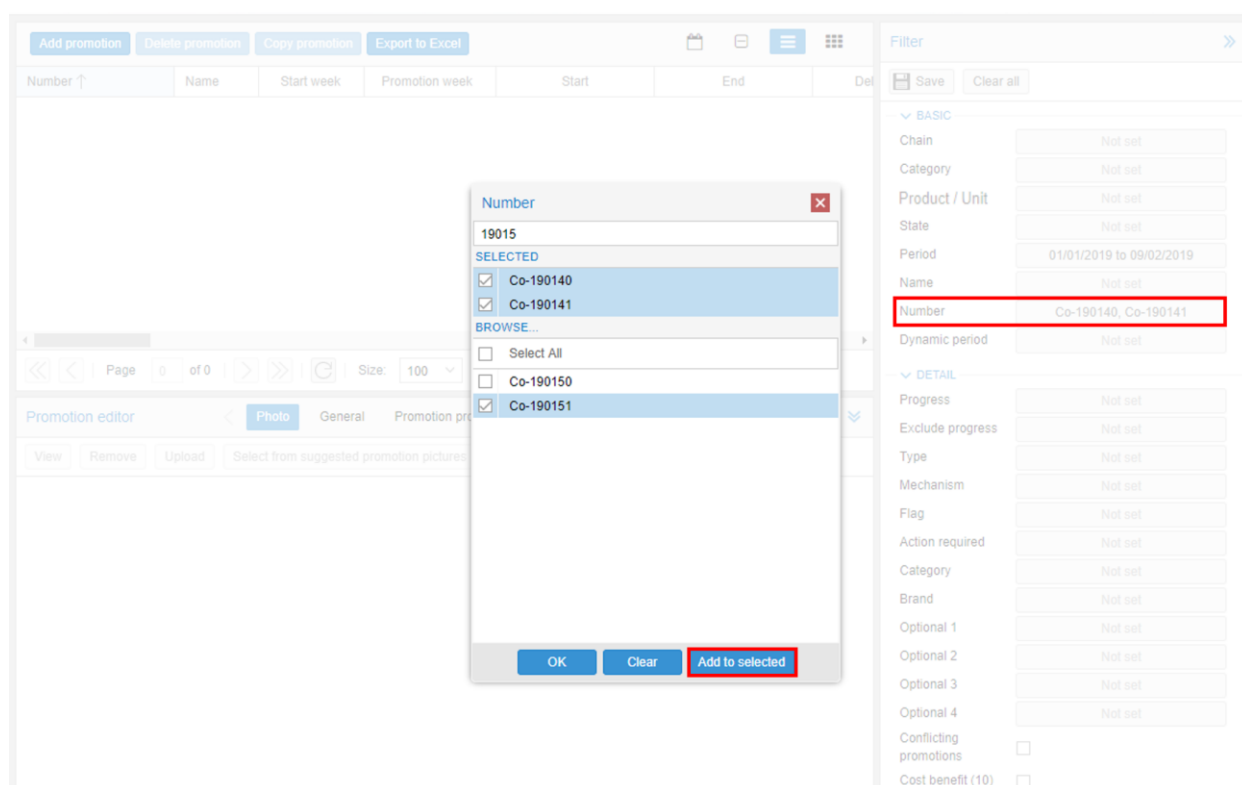
The name of the promotions is provided by you when creating or editing the promotion.

The number is generated by effectmanager when creating or copying a promotion.

When entering a name or number in the search filter, you can select more than one by pressing *Add to selected*.

⚠ OBS! If not all the added promotions are shown, you need to clear some of your other filters.

The example below shows a search for promotions by different numbers and how to add different promotion numbers to the search.

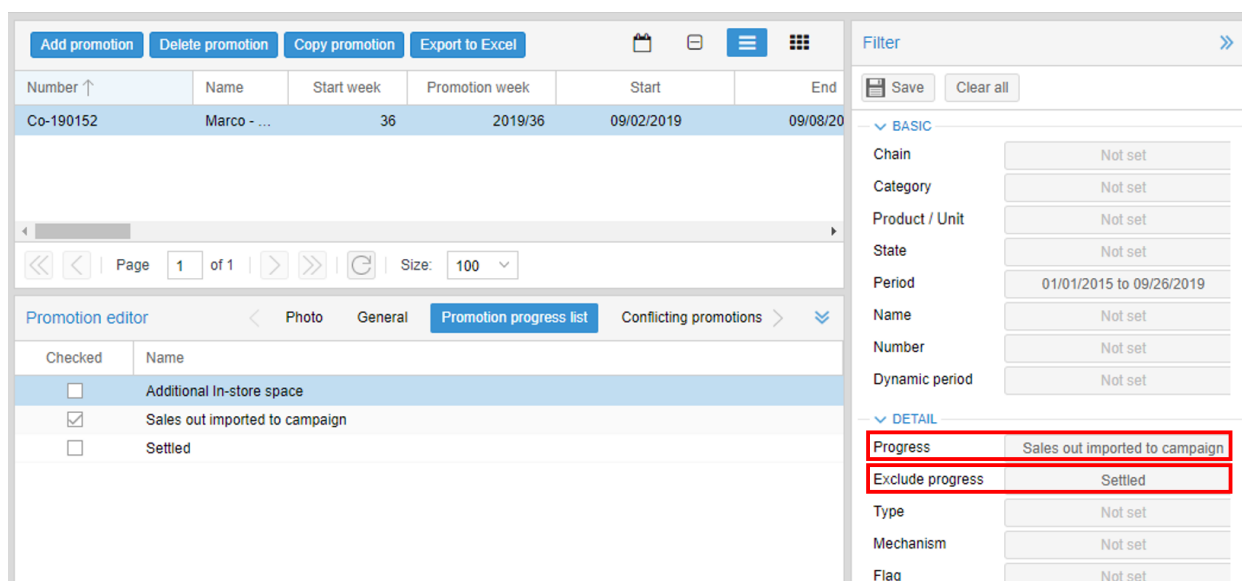


Detail Filters

Progress and Exclude Progress filters are great to use if you want to filter on checklist items from the Promotion Progress list from Scheduler.

The example below shows a search for completed promotions, where sales out have been read in, but settled promotions are excluded, so I now know which promotions I need to act on.

NB! It is important to remember to change the state of your promotions to completed. POS data for promotions are only updated automatically for completed promotions.



The screenshot shows the 'Promotion progress list' in the effect manager. The main table lists promotion details, and a sub-table below shows checklist items. The filter panel on the right is expanded to show 'BASIC' and 'DETAIL' filters. In the 'DETAIL' section, the 'Progress' filter is set to 'Sales out imported to campaign' and the 'Exclude progress' filter is set to 'Settled'. These two filter settings are highlighted with a red rectangular box.

Number ↑	Name	Start week	Promotion week	Start	End
Co-190152	Marco - ...	36	2019/36	09/02/2019	09/08/2019

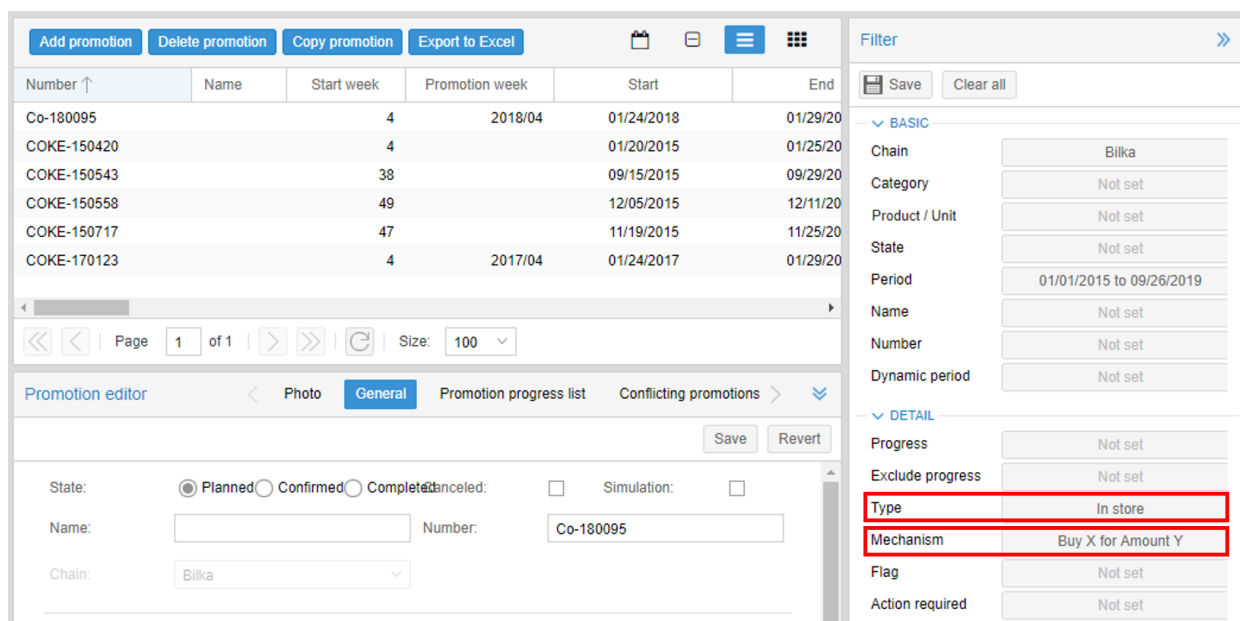
Checked	Name
<input type="checkbox"/>	Additional In-store space
<input checked="" type="checkbox"/>	Sales out imported to campaign
<input type="checkbox"/>	Settled

Filter	
Chain	Not set
Category	Not set
Product / Unit	Not set
State	Not set
Period	01/01/2015 to 09/26/2019
Name	Not set
Number	Not set
Dynamic period	Not set
DETAIL	
Progress	Sales out imported to campaign
Exclude progress	Settled
Type	Not set
Mechanism	Not set
Flag	Not set

Type and Mechanism filters are great to use if you want to see a specific type of promotion or promotions with a specific mechanism.

The example below shows a search for In-Store promotions in Bilka, where the Mechanism is selected as Buy X for Amount Y.

👍 Pro tip: If you are having trouble finding your promotions, make sure to check your filters. Try clearing the filter and input your criteria again.



Number ↑	Name	Start week	Promotion week	Start	End
Co-180095		4	2018/04	01/24/2018	01/29/20
COKE-150420		4		01/20/2015	01/25/20
COKE-150543		38		09/15/2015	09/29/20
COKE-150558		49		12/05/2015	12/11/20
COKE-150717		47		11/19/2015	11/25/20
COKE-170123		4	2017/04	01/24/2017	01/29/20

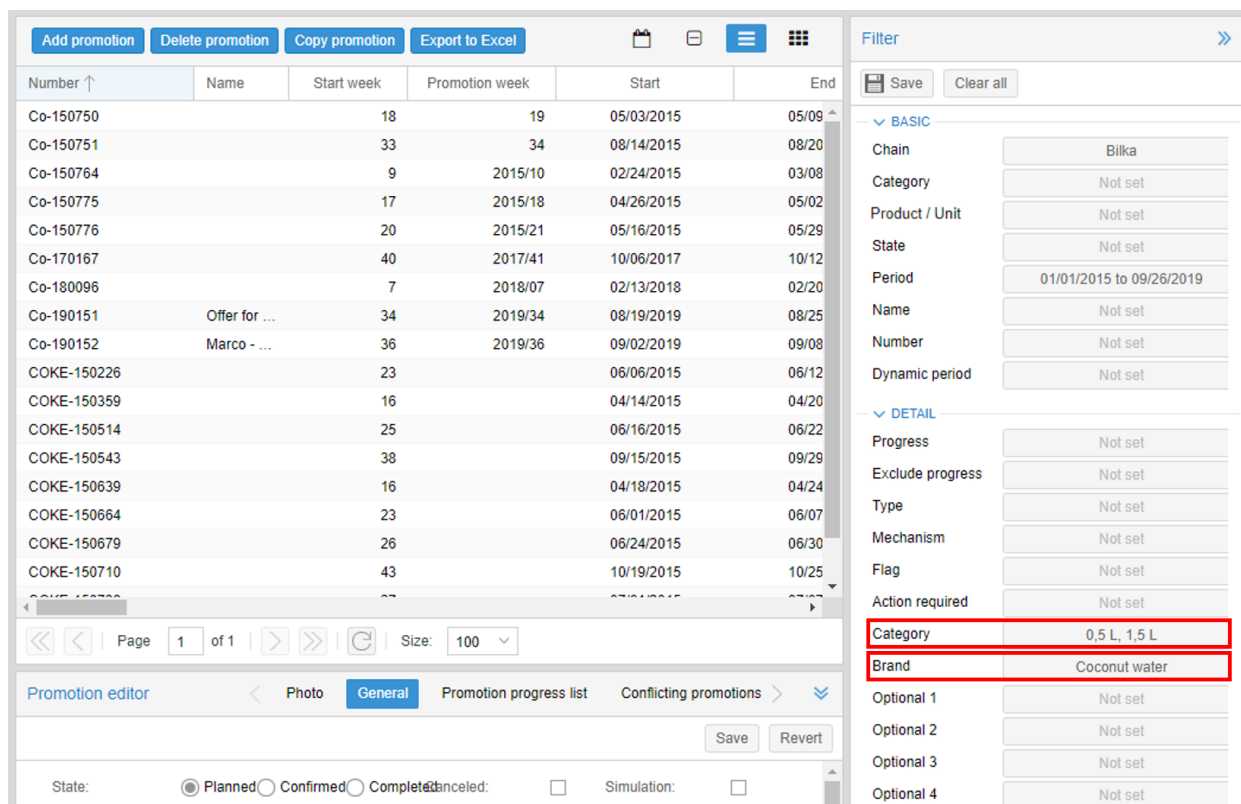
Filter	
Save	Clear all
BASIC	
Chain	Bilka
Category	Not set
Product / Unit	Not set
State	Not set
Period	01/01/2015 to 09/26/2019
Name	Not set
Number	Not set
Dynamic period	Not set
DETAIL	
Progress	Not set
Exclude progress	Not set
Type	In store
Mechanism	Buy X for Amount Y
Flag	Not set
Action required	Not set

Categorization filters *Category, Brand, Optional 1-4* can be used if you want to see promotions within a specific category or brand. In these filters, you will find the categorization you have enriched your products with.

It is the same category as you find in the Basic filters. Categories are correspondent to the categories provided in the product creation.

If you need a guide that shows you how to maintain the categorizations of your POS data. Please see our guide [How to maintain categorization of POS data](#)

The example below shows a search for promotions in Bilka within the two categories 0.5 L, and 1.5 L within the Brand Coconut Water.



The screenshot displays the 'effect manager' interface. At the top, there are buttons for 'Add promotion', 'Delete promotion', 'Copy promotion', and 'Export to Excel'. Below these is a table of promotions with columns for 'Number', 'Name', 'Start week', 'Promotion week', 'Start', and 'End'. The table lists various promotions, including 'COKE-150226' and 'COKE-150359'. Below the table is a pagination control showing 'Page 1 of 1' and a 'Size: 100' dropdown. To the right of the table is a 'Filter' panel with 'Save' and 'Clear all' buttons. The filter panel is divided into 'BASIC' and 'DETAIL' sections. In the 'BASIC' section, 'Chain' is set to 'Bilka' and 'Period' is '01/01/2015 to 09/26/2019'. In the 'DETAIL' section, 'Category' is set to '0.5 L, 1.5 L' and 'Brand' is set to 'Coconut water', both of which are highlighted with red boxes. Other filter fields like 'Progress', 'Exclude progress', 'Type', 'Mechanism', 'Flag', and 'Action required' are all set to 'Not set'. At the bottom of the interface, there is a 'Promotion editor' section with tabs for 'Photo', 'General', 'Promotion progress list', and 'Conflicting promotions'. The 'General' tab is active, showing 'State' options: 'Planned' (selected), 'Confirmed', 'Completed', and 'Canceled', along with 'Simulation' checkboxes.

POS filters


When searching for key figures in your POS reports, you can use POS filters to narrow your search. POS filters are divided into Shop filters, Category filters, and Date filters. Below we will go through the different POS filters.

Shop filters

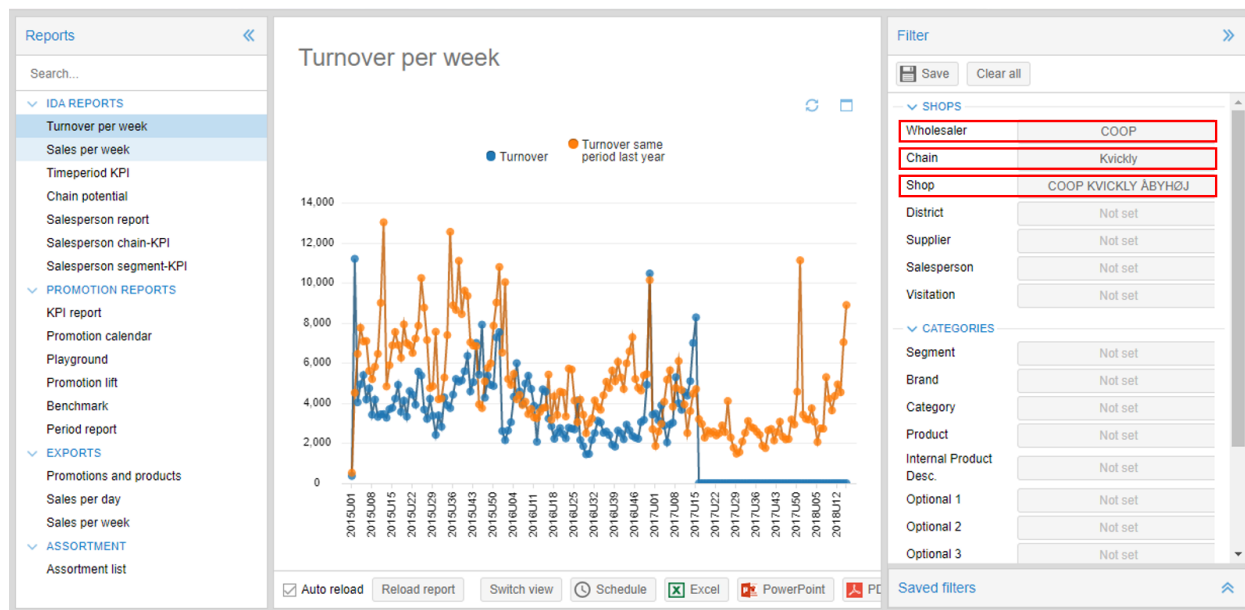
Shop filters are all related to the shops you have POS sales on. In this section, you will find filters for Chains, Shop, Salesperson, etc.

Wholesaler, Chain, and Shop provides you with the opportunity to look at sales figures at wholesaler, chain, or shop level for a specific period. In these filters, you will find the wholesaler and stores that you have POS sales on.

Chain and Shop filters can be used without selecting the wholesaler. The Shop filter can be used without using a wholesaler or/and chain filters. But the filters are correlated. If you choose Coop as a wholesaler, you can only find Chains and Store within Coop.

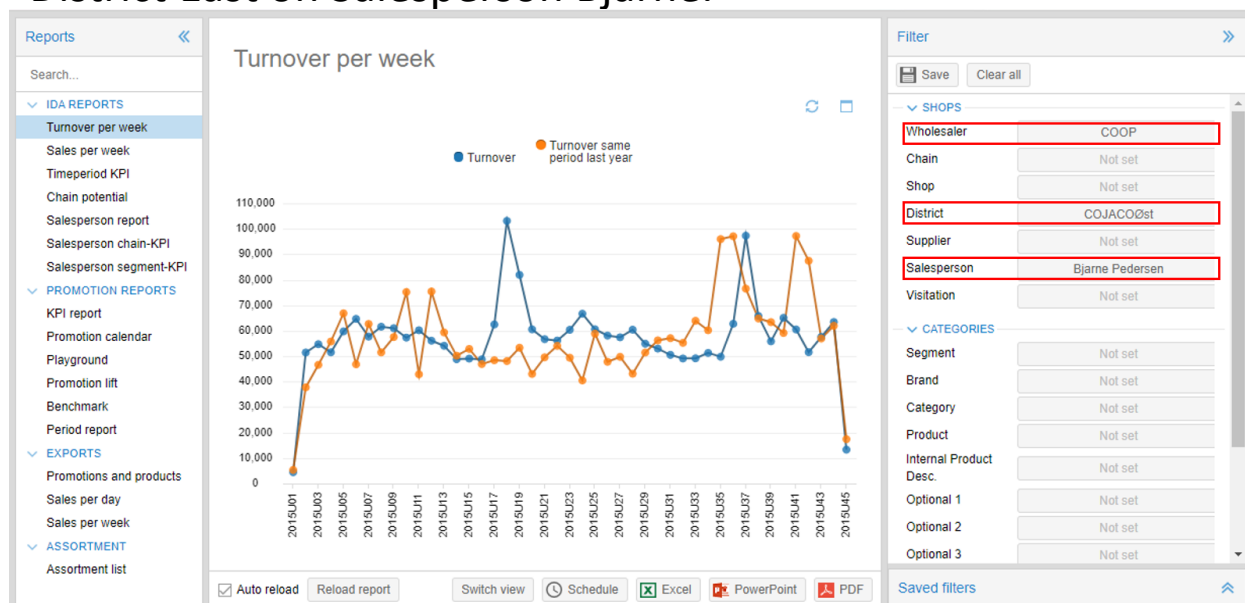
 **Pro tip:** If you get an empty POS report, make sure to check your filters. Try clearing the filter and input your criteria again.

The example below shows a POS report for Turnover per week for a specific store.



District, Salesperson, and Visitation allow you to filter your POS reports on criteria from your field force. These filters are codependent, meaning your selection in the District filter will only allow you to choose Salespersons that are connected to this District.

In the example below, the District and Salesperson are added to the filters. Providing a Turnover per week for Coop in District East on Salesperson Bjarne.



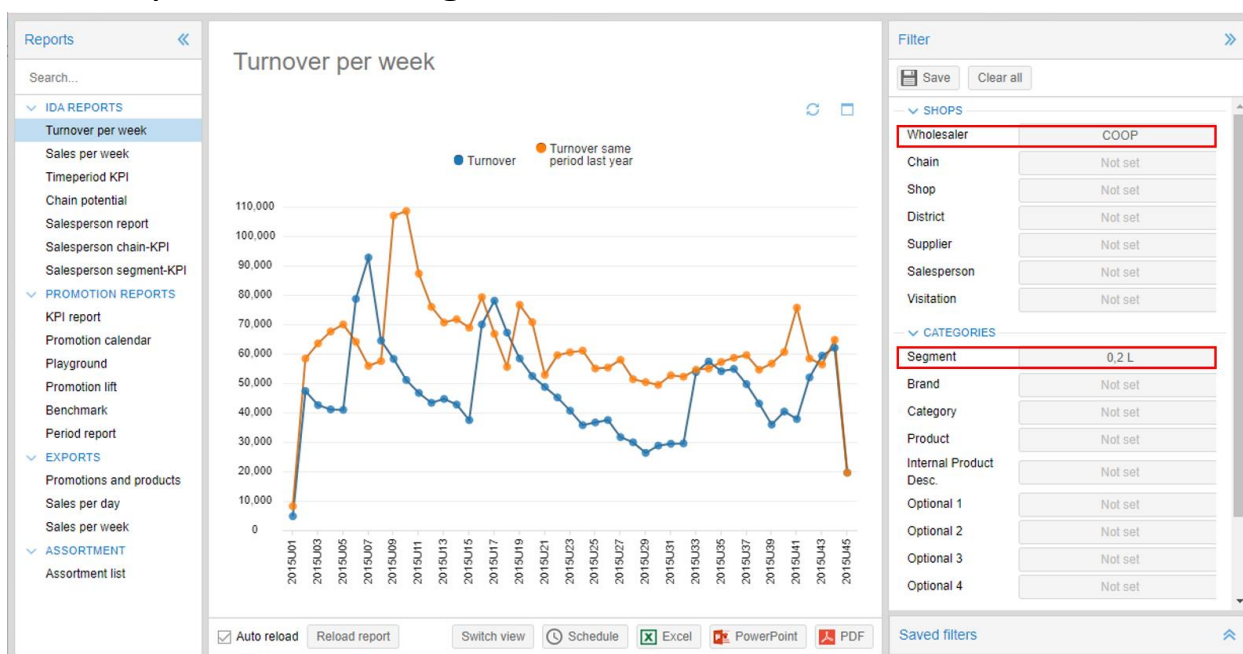
Category filters

Category filters *Category, Brand, Optional 1-4* can be used if you want to see key figures within a specific category or brand. In these filters, you will find the categorization you have enriched your products with.

Segments correspondent to the categories provided in the product creation.

If you need a guide that shows you how to maintain the categorizations of your POS data. Please see our guide [How to maintain categorization of POS data](#)

The example below shows the POS report Turnover per Week in Coop within the segment 0,2 L.



Date Filters

A period is always pre-selected in all filters in effectmanager. The period is saved when navigating between the different modules in effectmanager. You can select a preferred period or use the dynamic period filter by pressing *IDA Dynamic period*.

👍 Pro tip: Be aware of the selected filter in connection to your POS report. If you use the weekly reports and select a period that is across the weeks, it will include sum up the data from the selected weeks

IDA Dynamic period
✕

Year to last week

Last week

Current week

Next week

Last month

Current month

Next month

Last quarter

Current quarter

Next quarter

Quarter to last week

Quarter to date

Last 1 days

Next 1 days

Include today

Last 1 weeks

Next 1 weeks

Include current week

Last 1 months

Next 1 months

Include current month

Last 1 quarters

Next 1 quarters

Include current quarter

OK
Clear