

How to copy promotions in effectmanager

This guide shows you how to copy promotion in
effectmanager.

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



If you want to copy existing promotions, this can be done in two ways:

- [Quick Copy with Drag'n'Drop in Promotion Scheduler](#)
- [Copying a single promotion in Promotion Scheduler](#)
- [Copying multiple promotions in Promotion Properties](#)

Quick Copy with Drag'n'Drop in Promotion Scheduler

Quick Copy of promotions can be used in Promotion Scheduler Single View.

1. To copy one or more existing promotions go to *Promotion Scheduler Single View* and select the promotions you want to copy.

To quick copy, multiple promotions they must have the same: Start Date, End Date, and Retail Chain

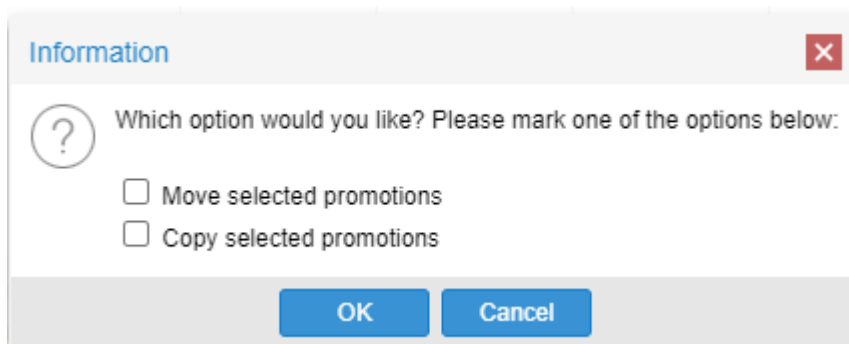
👍 Pro tip: You select multiple promotions by holding CTRL on the Keyboard and pressing the promotions in effectmanager, you want to select for quick-copy. Promotions selected are marked with a bold blue line.

To deselect all selected promotions, simply press somewhere in the Promotion Calendar in Single View.

2. When you have selected the promotions for quick-copy, you simply drag them to the new period and drop them.

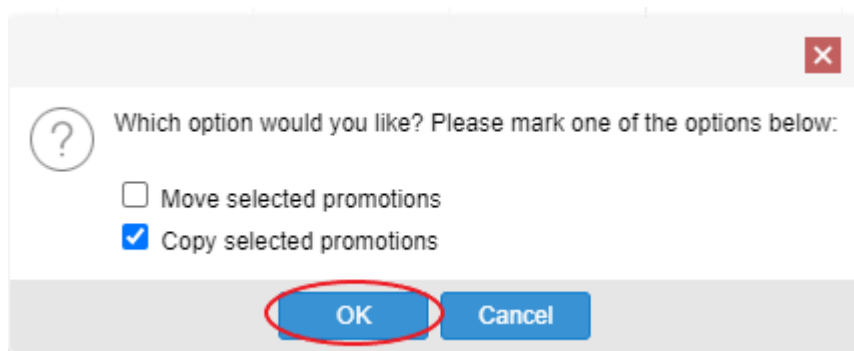
⚠️ OBS! It is important that the period filter covers the entire period. From the start of the promotion, you want to copy to the end date where you want to copy the promotion too.

3. A pop-up window, will ask you to confirm if you are copying or moving the selected promotions to the new period.



4. In the pop-up, please select *Copy selected promotions*, if you want to copy the promotions to the new period. By pressing *OK* your selected promotions will be copied to the new period with Promotion Stage *Planned*.

If you want to know more about Promotion Stages, please see our guide [How to use promotion stages correct](#)



👍 Pro tip: If you select to move your selected promotions, they will be moved with the same Promotion Stage, etc.

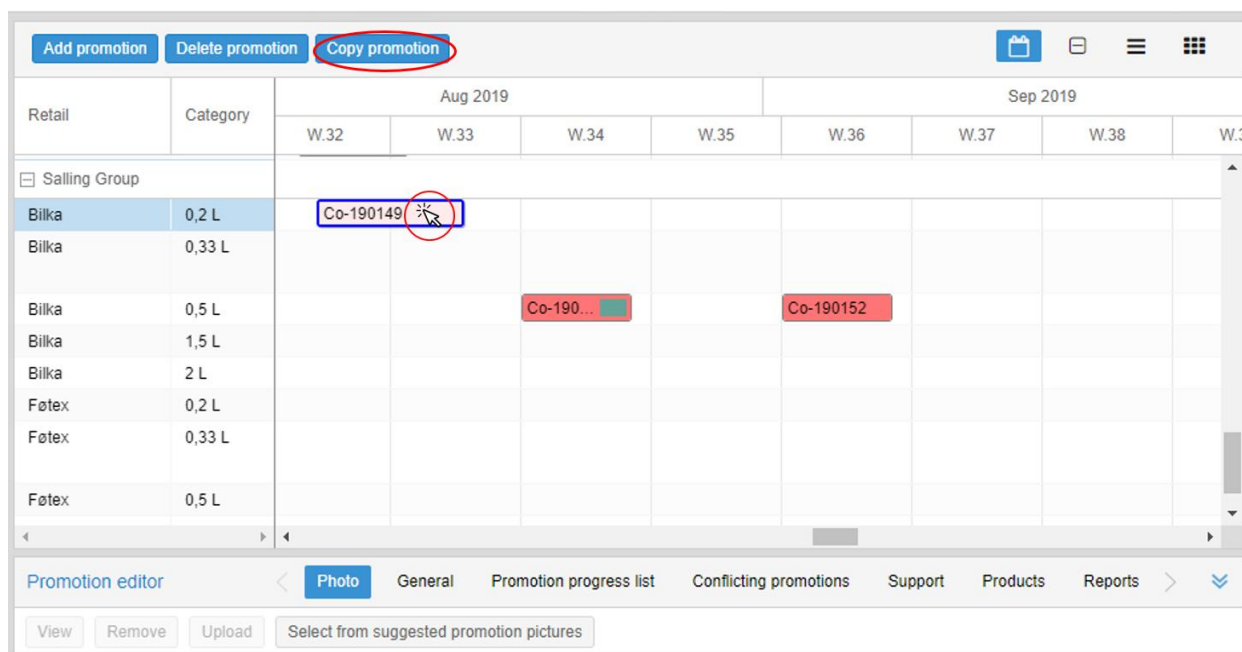
Copying a single promotion in Promotion Scheduler

Promotions can be copied from both Single View, Double View, ListView, and Thumbnail View.

Our guide will show you how to copy a promotion in Single View, but the steps are the same.

1. To copy an existing promotion go to *Promotion Scheduler* and select the promotion you want to copy by clicking it. Then click *Copy Promotion*.

You can also right-click on the promotion and choose *Copy Promotion*.



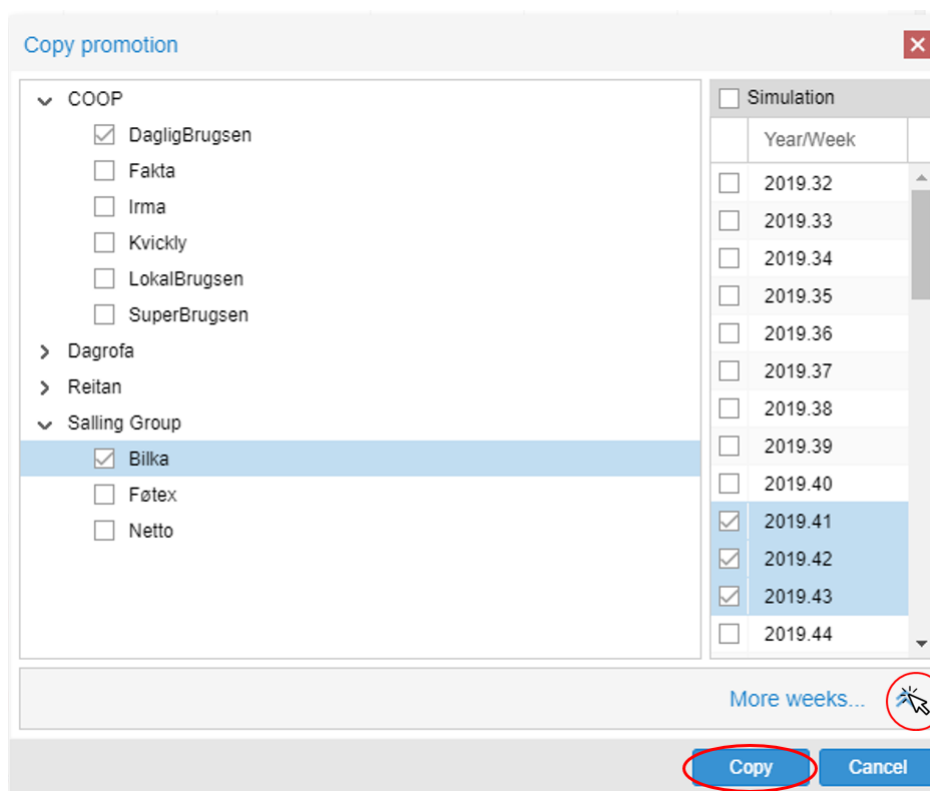
The screenshot shows the 'Promotion Scheduler' interface. At the top, there are three buttons: 'Add promotion', 'Delete promotion', and 'Copy promotion' (the latter is circled in red). Below the buttons is a table with columns for weeks (W.32 to W.38) and rows for different promotions. The first row is selected, and a red circle highlights the 'Co-190149' promotion. Below the table, there is a 'Promotion editor' section with tabs for 'Photo', 'General', 'Promotion progress list', 'Conflicting promotions', 'Support', 'Products', and 'Reports'. The 'Photo' tab is active, and there are buttons for 'View', 'Remove', 'Upload', and 'Select from suggested promotion pictures'.

2. The promotion can now be copied to a single week or several weeks and across chains and to several chains. When you have selected the weeks, and chains you wish to copy the promotion to press *Copy*.

3. If the period you want to copy your promotion to is not shown in the *Year/Week column*, press *More Weeks*. In the calendar, you can now select a period and press *More Weeks* to select the period.

Now follow **step 2** to finish copying your promotion.

To see the video explanation – please [go to the knowledge base article](#).

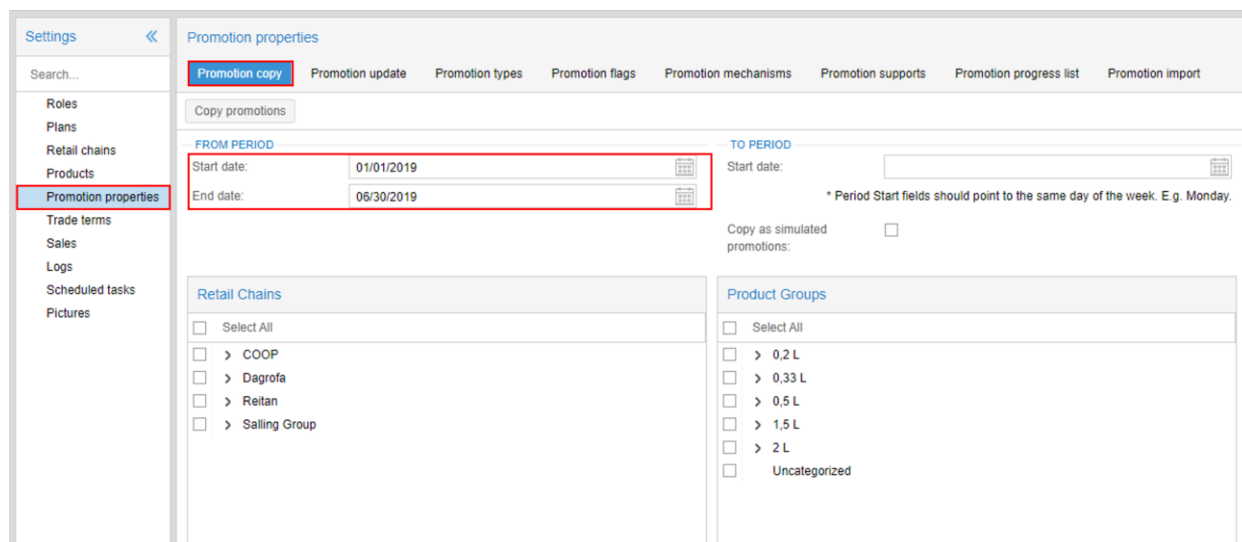


⚠ OBS! You will experience an error message if you copy a promotion to a chain, where one or more products are not listed. If you wish to add the products or units, then you need to add the chains to the products.

Copying multiple promotions in Promotion Properties

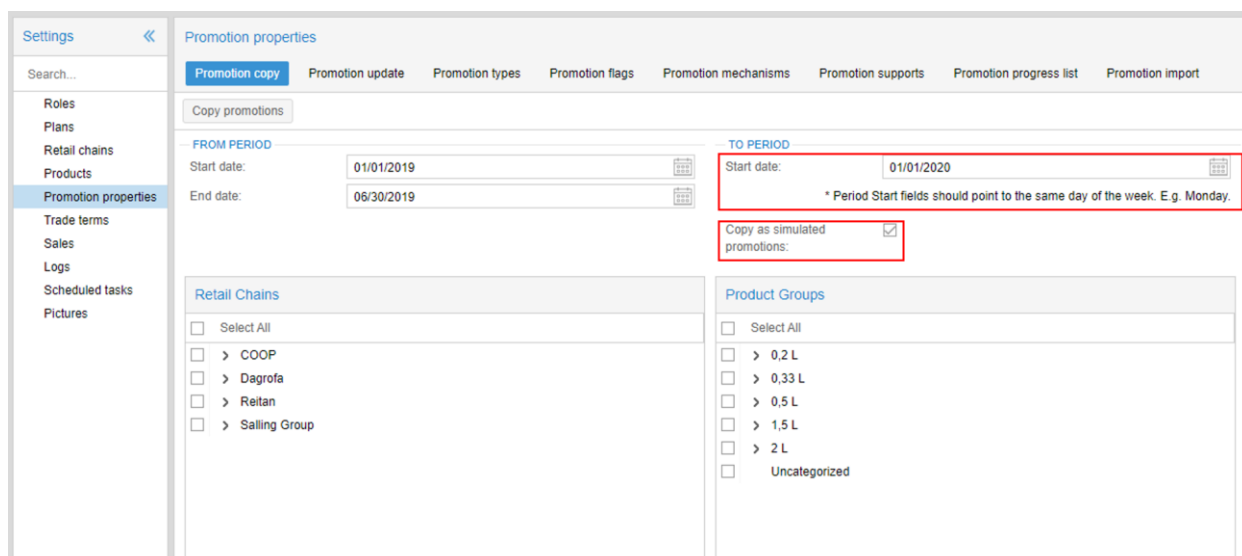
Go to *Settings* and in the side menu press *Promotion Properties*. In the menu tab, go to *Promotion Copy*.

1. Select the period for the promotions that you want to copy.



2. Input the start date for the period you want to copy your promotions to.

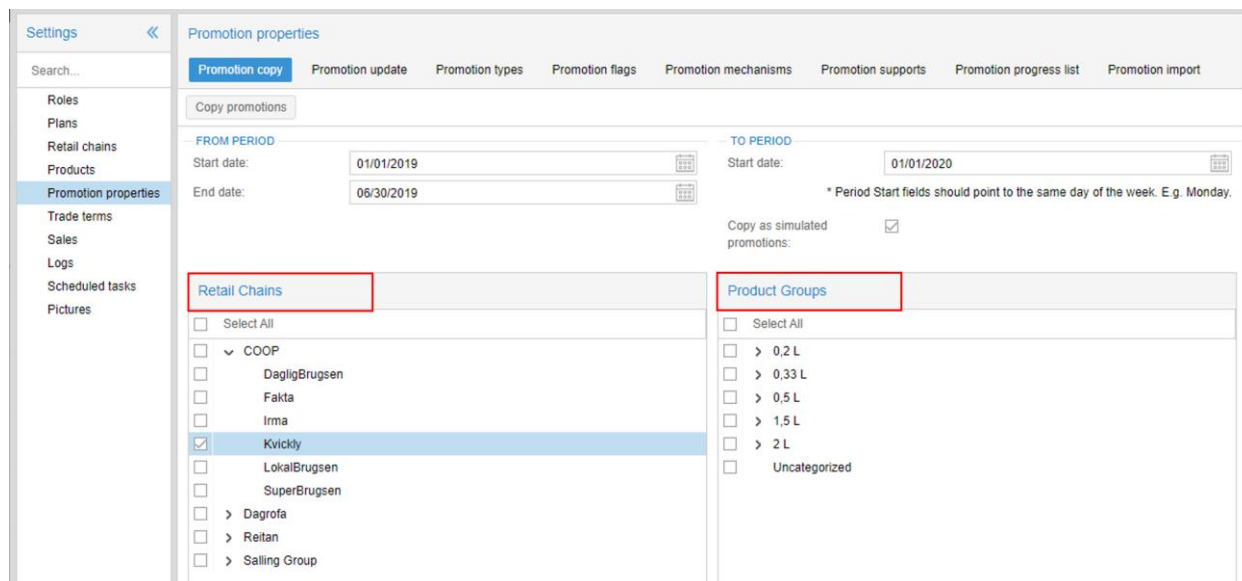
You can select to copy your promotions as simulated.



3. Select which Retail Chain(s) you want to copy promotions from.

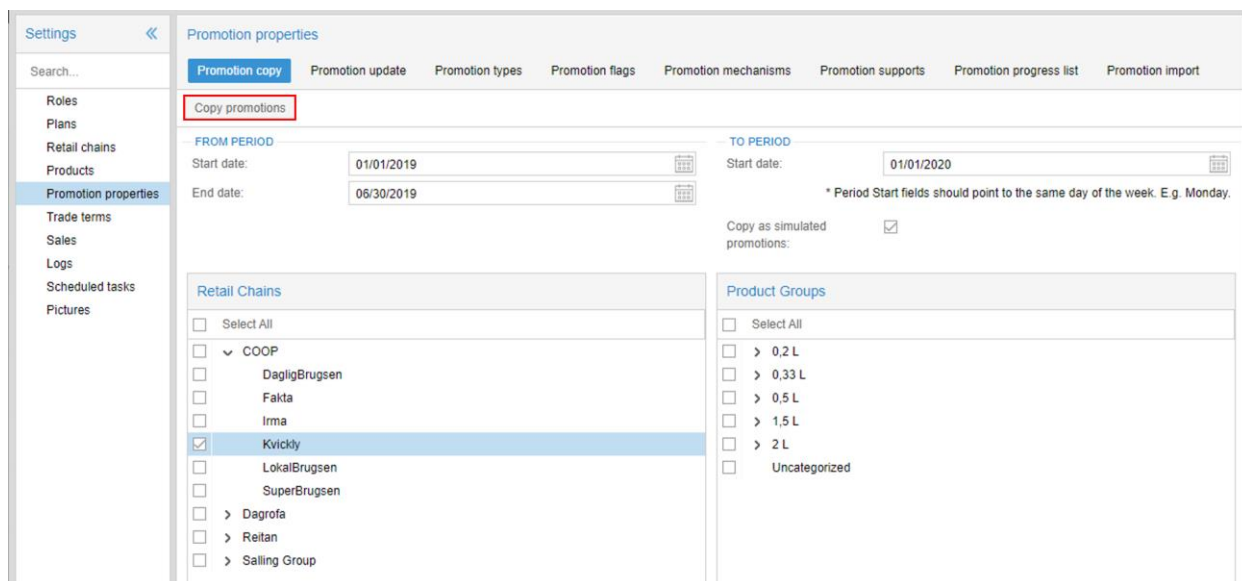
NB! Using this multi promotion copy does not allow you to copy promotions across chains.

3.A If you wish to copy promotions within a specific category, select this under Product Groups.



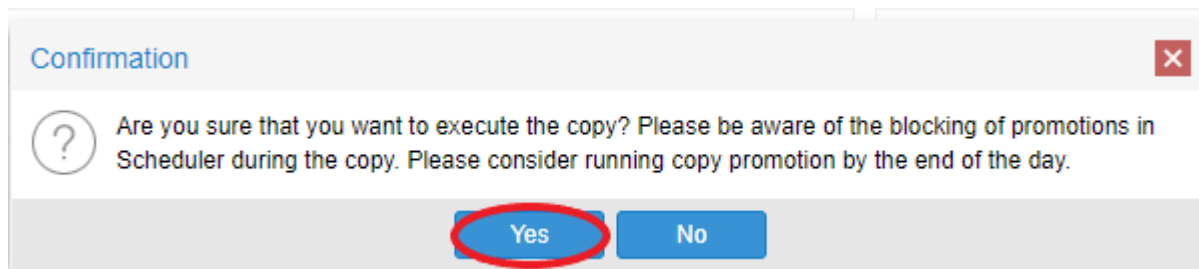
The screenshot shows the 'Promotion properties' page with the 'Copy promotions' tab active. The 'FROM PERIOD' section has a start date of 01/01/2019 and an end date of 06/30/2019. The 'TO PERIOD' section has a start date of 01/01/2020. A note indicates that period start fields should point to the same day of the week (e.g., Monday). The 'Copy as simulated promotions' checkbox is checked. In the 'Retail Chains' list, 'Kvickly' is selected. In the 'Product Groups' list, '0,2 L' is selected.

4. Finish by pressing *Copy promotions*.



This screenshot is identical to the previous one, but the 'Copy promotions' button at the top of the main content area is highlighted with a red rectangular box, indicating the final step of the process.

5. In a pop-up window, you are asked to confirm your selections.



6. A new pop-up window informs you that your job has started, and you will receive an email confirmation when your update has finished.

Promotion copy



noreply@effectmanager.dk
To

Hi,

Promotion copy is finished.

30 records have been copied.

Criteria:

Period: From Period 1/1/2020 - 12/31/2020 To Period 1/1/2021

Options: Copy as simulated is False

Chains: Bilka; Føtex; Netto;

Product Groups: All were selected

Best regards,

Effectmanager Team