How to update promotions Sales Figures

This guide shows you how to manually update the sales figures for promotions.

This guide is only of relevance if you have the promotion module and upload sales to effectmanager.

If you have uploaded Baseline, Sales Inn or Sales Out to effectmanager, and you want these new sales figures included in your Promotion Finance, you need to update the affected promotions.

If you need a guide that shows you how to upload Promotion Sales Figures, please see one of our guides How to upload Baseline, How to upload Sales In , How to upload Sales Out or How to upload Returned Volumes.

Baseline

- Used for various KPI calculations.
- Available for an automatic update by effectmanager.
- Can be uploaded and maintained manually by you.

The value is shown for the consumer unit.

Sales Out

- Used for various KPI calculations.
- Available through Point of Sales data from your customers.
- Can be uploaded and maintained manually by you.

The value is shown for the consumer unit.

Sales In

- Used for various KPI calculations.
- Available for automatic import to effectmanager from your ERP
- Can be uploaded and maintained manually by you.

The value is shown for the Colli Unit.

Returned Volumes

- Used for various KPI calculations.
- Is subtracted Sales In and Sales Out in Promotion Finance Reports
- Available for automatic import to effectmanager from your ERP
- Can be uploaded and maintained manually by you.

The value is shown for the consumer Unit.

You can update promotions with the sales figures in two ways:

- Update individual promotions with sales figures.
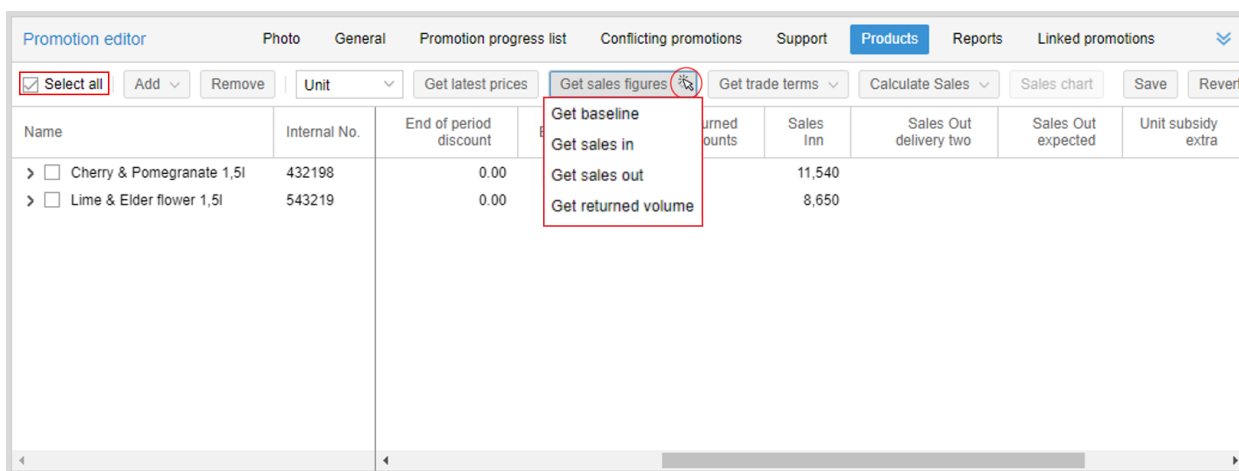- Update multiple promotions with a Promotion update.

Update individual promotions with sales figures

Go to Promotion Scheduler and find the promotion that you would like to update with the new Trade Terms.

1. In Promotion Editor, go to the Products tab.

2. *Select All* products and press *Get sales figures.*
NB! Remember to save your promotion after updating sales figures.

👍 **Pro tip:** To get sales out, your promotion must have a completed stage.

If you need a guide, that describes how to use promotion stages, please see our guide [How to use promotion stages correct](#)
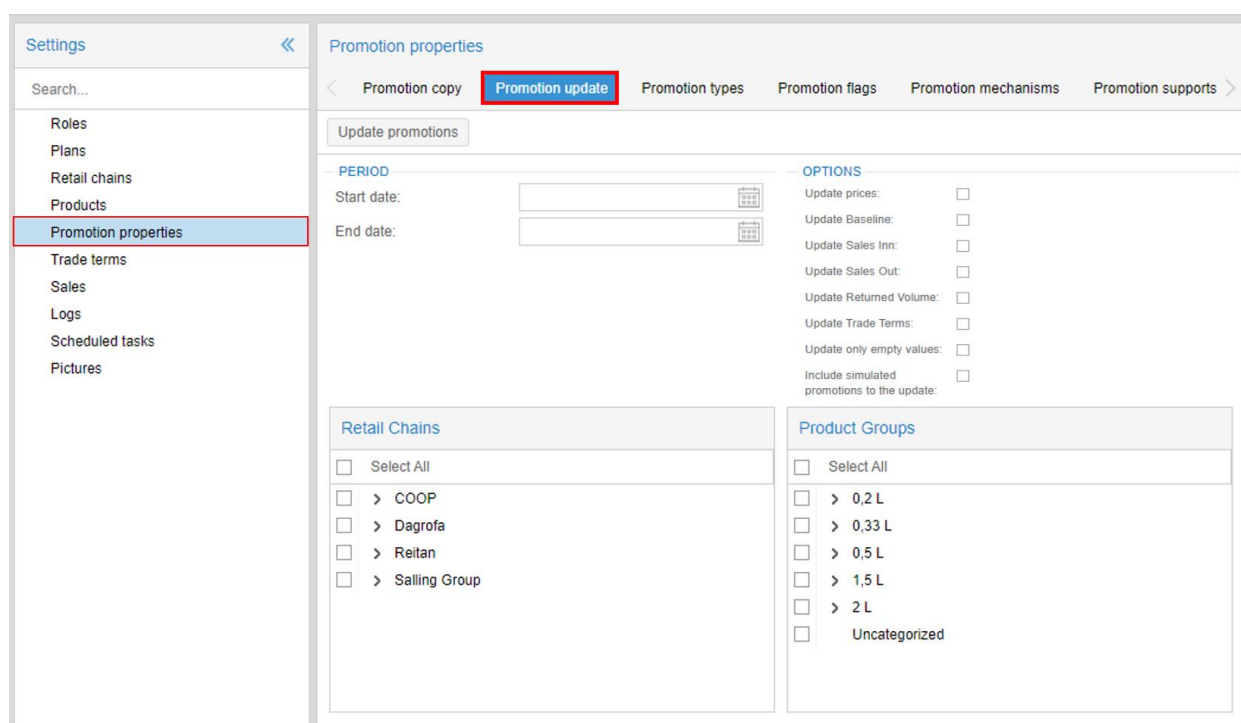
If you get Sales Out through your POS data - the weekly POS integration must have run before you can import it to the promotions. [See here when the POS integration runs.](#)

Update multiple promotions with a Promotion update

Go to Settings in effectmanager, and press *Promotion Properties*.

> ⚠️ **OBS!** It is important only to start a Promotion Update EOB, as this update will block Promotion Scheduler for all other users of effectmanager.
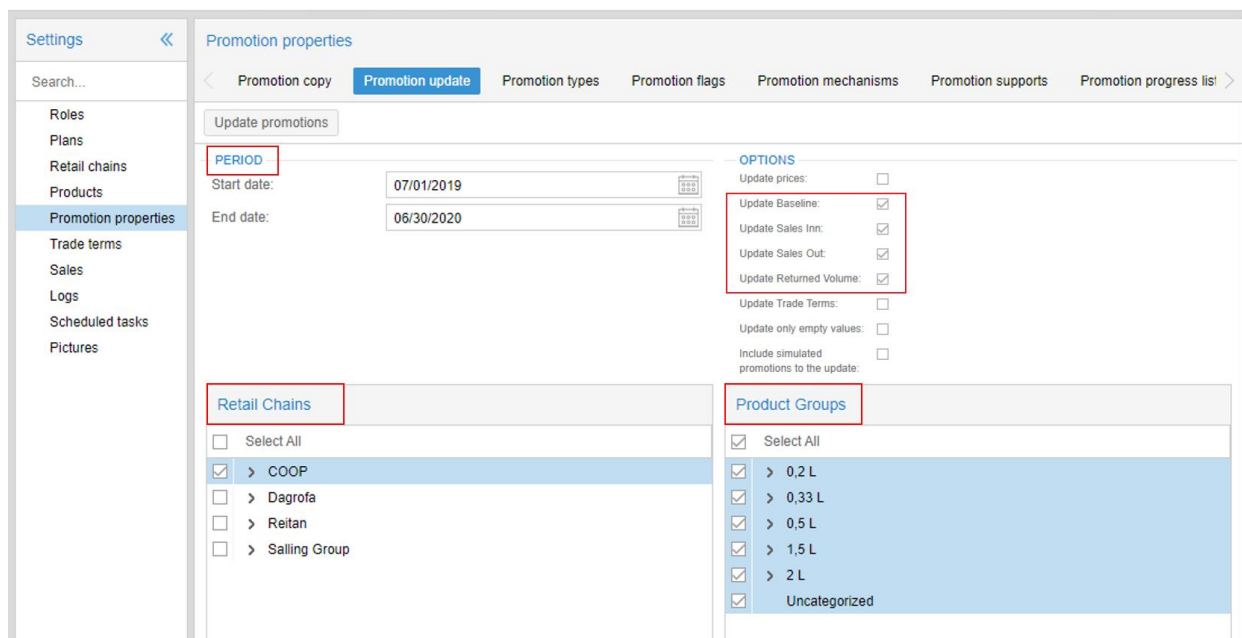
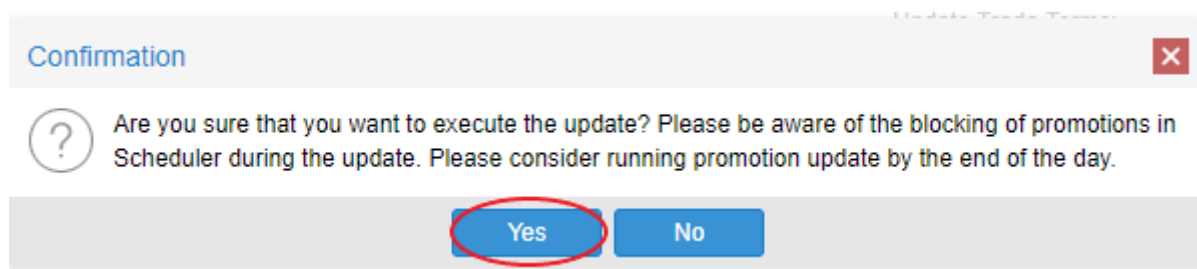**3.** In Promotion Properties, go to the Promotion Update tab.

4. Select the sales figures you wish to update. Then Select the Period, Retail Chains, and Product Groups you wish to update. Finish by pressing *Update Promotions.*

> ⚠️ **OBS!** It is important only to start a Promotion Update EOB, as this update will block Promotion Scheduler for all other users of effectmanager.

5. A pop-up window will ask you to confirm the update before it starts. Press *Yes* if you want to start the update.

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 update

N   noreply@effectmanager.dk
    To Support effectmanager

Hi,
Promotion update is finished.
15 records have been updated.
Criteria:
Period: 10/1/2020 - 12/31/2020
Options: Update Baseline; Update Sales in;
Chains: Daglibrugsen; Fakta; Irma; Kvickly; Superbrugsen;
Product Groups: All were selected
Best regards,
Effectmanager Team