How to update promotions Trade Terms

This guide shows you how to update the Trade Terms for promotions.

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





If you upload new Trade Terms for a chain or product group, you will need to update the affected promotions.

If you are looking for a guide that shows you how to upload Trade Terms to effectmanager, please see our guide <u>How to upload Trade Terms</u>

When updating Trade Terms, you can update the following; End of Period Discount, NS/L Budget, and Additional Discount on Invoice Price.

▲ OBS! For Additional Discount on Invoice Price for Mix Pallets it will show Multiple Values, as product group definition of the discount can provide different discounts on products on the Mix Pallets if they belong to different Product Groups.

End of Period Discount

- Visible in the Products tab in promotion editor as *End of period Discount*.
- Visible in List View column as *Trade Terms*.
- Visible on Promotion Finance report as part of *Trade terms*.
- Visible on Promotion P&L report *Total* end of period discount.
- Visible on Promotion P&L Sales In as End of period Discount.
- Visible on Promotion P&L Sales Out as End of period Discount.

Additional Discount on Invoice Price

- Visible in the Products tab in promotion editor as Additional Discount on Invoice Price
- Visible in List View column as *Trade Terms Sales In or Sales Out*
- Visible on Promotion Finance report as part of *Trade terms*.
- Visible on Promotion P&L report as Additional discount on invoice price Sales In and Additional discount on invoice price Sales out
- Visible on Promotion P&L Sales In as Additional discount on invoice price.
- Visible on Promotion P&L Sales Out as Additional discount on invoice price.



NS/L Budget

 ONLY visible on Promotion P&L report as NS/L (budget).

Update Trade Terms on individual promotions

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 Trade Terms* then select the Trade Term you wish to update.

NB! Remember to save your promotion after updating the Trade Term.

Promotion editor <	Photo General	Promotion progres	ss list Conflicting pr	omotions Sup	port Products	Finance Customer report	s > 😽
Select all Add V Remove	Unit v	Get latest prices	Get sales figures \lor	Get trade terms	Calculate Sales	Sales chart Save	Revert
Name	Unit type	Internal No.	Baseline	Get End of Perio Get NS/L Budget Get Additional Di		EAN	Measure
Grape & Elder flower 0,51		147258	1,029	13,000	Coconut water	7310350117123	Milliliters
> 🖂 Natural 0,51		567891	1,029	11,000	Coconut water	7310350116911	Milliliters
> 🖂 Raspberry & Apple 0,51			1,029	7,900	Mineral water +	5700417991247	Milliliters
4				1			



Update Trade Terms 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.

Settings	Promotion properties Promotion copy Promotion update	Promotion types	Promotion flags F	Promotion mechanisms	Promotion supports $>$
Roles Plans	Update promotions				
Retail chains Products	PERIOD Start date:		OPTIONS Update prices: Update Baseline:		
Promotion properties Trade terms Sales Logs Scheduled tasks Pictures	End date:		Update Sales Inn: Update Sales Out: Update Returned Vol Update Trade Terms: Update only empty va	lume:	
	Retail Chains Select All > COOP > Dagrofa > Reitan		Product Groups Product Groups > 0,2 L > 0,33 L > 0,5 L		
	Salling Group		 > 1,5 L > 2 L Uncategoi 	rized	

4. Mark *Update Trade Terms* and select the Trade Term 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.



Settings 《	Promotion properties							
Search	Promotion copy Promo	otion update Promotion types	Promotion flags	Promotio	on mechanisms F	Promotion supp	orts Promotion progress list	Promotion import
Roles Plans Retail chains	Update promotions PERIOD OPTIONS							
Products	Start date:	04/01/2020			Update prices:		Update End Of Period Discount:	
Promotion properties	End date:	06/30/2020		000	Update Baseline:		Update NS/L Budget:	
Trade terms Sales					Update Sales Inn: Update Sales Out:		Update Additional Discount on Invoice Price:	
Logs Scheduled tasks					Update Returned			
Pictures					Update Trade Terr			
					Include simulated promotions to the	update:		
	Retail Chains				Product Groups			
	Select All				Select All			
	COOP				✓ > 0,2 L			
	Dagrofa				✓ > 0,33 L ○ > 0,5 L			
	Reitan Salling Group				🗌 🗲 1,5 L			
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					Uncategori	ized		

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



noreply@effectmanager.dk ⊺₀Support effectmanager

Hi, Promotion update is finished. 10 records have been updated. Criteria: Period: 10/1/2020 - 12/31/2020 Options: Update Trade terms; Update Aditional Discount on invoice Price; Chains: EUROspar; KIWI; Meny; Min Købmand; Spar; Product Groups: All were selected Best regards, Effectmanager Team