

## Introduction

This Quick guide will give you an overview of options in the promotion calendar. You will learn how to navigate promotion calendar, promotion list, to copy promotions, updating more promotions, replacing products in promotions and to printing a letter. In the end you know how to work with promotions.

## Quick guide concept

Through a number of easy steps you learn how to use the software.

Each step is numbered and defines a phase. Each phase contains a short description and an illustration to show how to navigate or operate in the software. The guide ends with a Q&A.



The guide *may* contain important general notices. These will be marked with an exclamation icon.



Tips and tricks are marked with an Info-icon.



Questions & Answers note relevant to the topic at hand.

# Working with promotions

## Promotion calendar

### 1 Open promotion calendar

In the ribbon: Click Promotions and Promotion Calendar.

Promotion Calendar opens in a new tab.

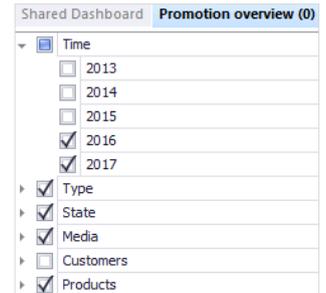
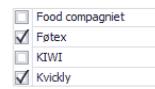


### 2 Filter the list

To the left there is a navigation panel, where you can filter the list the way you want.

Click in the area you want to filter, e.g. Time. Check the box to add or delete.

*Tip: Hide the panel by clicking the small arrow to the right in the panel. Show panel by clicking the arrow again.*

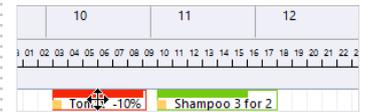


You have more options in promotion calendar. These options are defined in the next section.

## Navigating promotion calendar

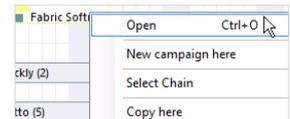
### Move promotions

Click on promotion in the calendar. The cursor will then change to 4 arrows (check the red promotion). Click and pull the promotion to a new period. The promotion is now moved.



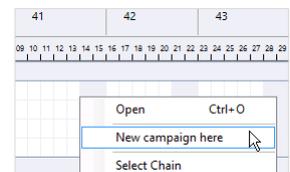
### Open promotion

Double-click on promotion. The promotion opens in a new window. After this you can adjust the campaign.



### Create promotion

Choose a from date by placing the cursor on the from date within the customer-area. Right-click and choose New campaign here.



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The system administrator can make the list layout available for all users.

## Promotion list

You can open promotion lists from the ribbon in Promotions or you can find the list under a customer. When opening a customer the promotion lists lies in Promotions.

### 1 Open promotion list

In the ribbon: Click Promotions and Promotion list.

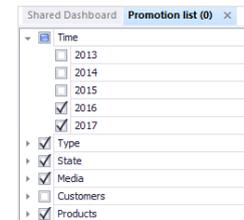
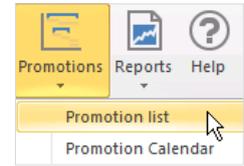
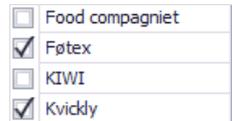
Promotion list opens in a new tab.

### 2 Filter the list

To the left there is a navigation panel, where you can filter the list the way you want.

Click the area you want to filter, e.g. Time. Check the box to show or hide.

*Tip: Hide the panel by clicking the small arrow to the right in the panel.*



You have more options in promotion list. These options are defined in the next section.

## Navigating promotion list

### Search in the list

Type the search criteria in the white field under whatever headline you prefer to search within. BMS will filter the list.

*Tip: Check for more specific search options by clicking this button in the white field.*



Promotion ID	Promotion name	Promotion state	Promotion type	From week
ms)				
Supermarked (3 items)				
266	Tomat -20%	6 Planned	Unknown	15
145	-10%	3 Approve...	Unknown	15
157	Shampoo 3 for 2	3 Approve...	Hard, Sing...	15

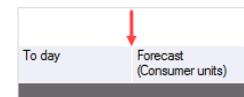
### Sort the list

The list can be sorted alphabetically or numerical in every column by clicking on a headline. An arrow will be shown that changes up or down, when you click on the column. This sorts the list from A-Z or Z-A; From the smallest value to the largest and vice versa.



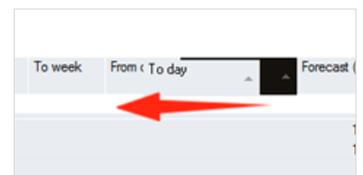
### Adjust column width

Place the cursor to the right for the column that needs to be changes in width—in the white space between the two columns. The cursor will be changes to a cross with two arrows, click and hold, pull the column to the wanted width. The width is changed.



### Move columns

The list can be adjusted by moving columns. Click and hold a column headline. Pull it to the wanted placement between two columns. 2 red arrows indicates that the movement is OK.

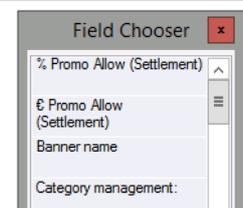


### Add or remove columns

Right-click in the list and choose Field Chooser.

Pull the wanted column to the placement you want and drop it between two other columns.

Remove column by pulling the column to Field Chooser.



## Arrange lists

It is possible to arrange the information of the list to make it more clear.

Pull a column headline to the field above the headlines.

Help text: *Drag and drop a column header to group.* Red arrows indicates when the placement is OK.

*Tip: You can arrange in more levels.*



## Freeze columns

It is possible to freeze the first columns to always make them visible in the left side of the list.

Right-click in the table: Choose Freeze columns and then choose the number of columns.

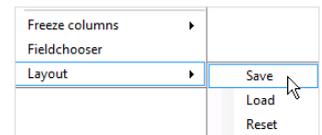
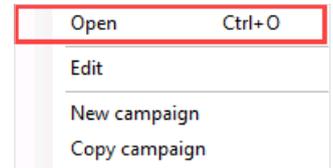
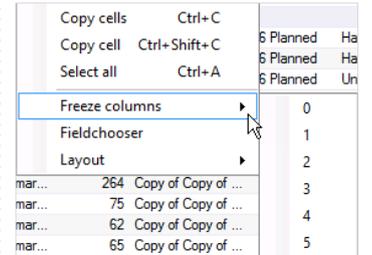
## Open promotion

Double-click on promotion. Promotion opens in new tab.

You can also right-click the promotion you want to open and click Open.

## Save layout

To save the layout of the promotion list, right-click in the list and select Layout in the list and click Save.



## Copy promotions

You can copy campaigns in more ways. You can copy promotions in the promotion calendar and promotion list, which was described previously. You can also copy promotions within the promotions.

### Copy within promotion

#### 1 Open promotion

Open the promotion either through promotion calendar or promotion list.

#### 2 Copy promotion

Click Copy in the ribbon. A box pops up asking if you want to copy campaign, click yes.

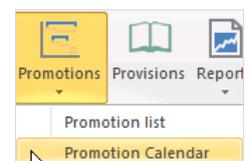
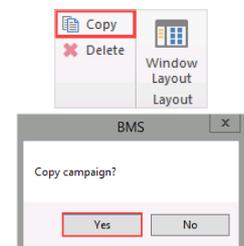
The copied promotion opens in a new tab.

### Copy in promotion calendar

#### 1 Open promotion calendar

In the ribbon: Click Promotions and Promotion Calendar.

Promotion Calendar opens in a new tab.



## Quick guide for BMS



You can click F4 to open the edit promotions pop-up window.



When opening the Edit promotions pop-up window for several promotions, the fields that does not contain the same information will be blank.

## 2 Copy promotion

Copy promotion from calendar by right-clicking and choose Copy here or Copy next year. After this you can pull the promotion to a new period and you can open it to adjust the name, volume, allowance etc.

### Copy in promotion list

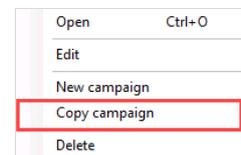
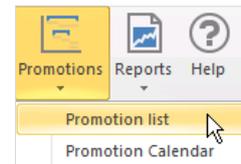
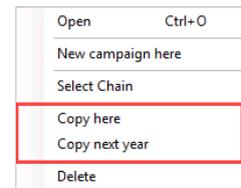
#### 1 Open promotion list

In the ribbon: Click Promotions and Promotion list.

Promotion list opens in a new tab.

#### 2 Copy promotion

Copy promotion from promotion list by right-clicking and choose Copy campaign.  
Now, BMS asks you to confirm if you want to copy the promotion. Click Yes. The promotion appears on the list as a copy of the original promotion



## Edit several promotions in one go

#### 1 Open promotion list

In the ribbon: Click Promotions and Promotion list.

#### 2 Select promotions for edit

Mark the promotions you want to edit. To mark more promotions keep down Shift or Ctrl - like in Excel.

#### 3 Open edit promotion pop-up window

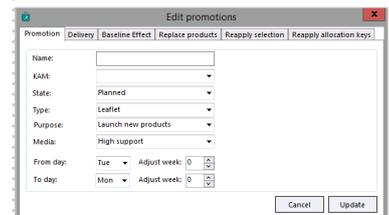
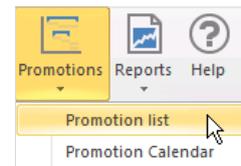
Click Edit in the ribbon to edit all the marked promotions. A pop-up window opens.

#### 4 Edit promotions

On each tab you have fields you can edit/change, like;

- Promotion
- Delivery
- Baseline effect
- Replace products
- Reapply selection
- Reapply allocation keys

These will be explained in the next section of this guide.



## Quick guide for BMS



In System options, Allocation and delivery, you can select a default promotion delivery profile. There are four options for delivery days. Three of them start Monday, and the last one is set to start on your selected promotion day.



Be careful to **Replace products** and **Reapply selection** as changes to product selection and volumes will be applied if the allocation key has been changes since the units were added.

## Options when editing several promotions in one go

### Promotion

Enter:

- Name, KAM, State, Type, Purpose and Media: Select the information from the drop-down lists.
- From day: Select the day for when the promotions starts.
- To day: Select the day for when the promotion ends.

The From day and To day are the days, the promotions go from and to. E.g. if you want your promotion to go from Tuesday to Sunday, you set From day to Tuesday and To day to Sunday. Then the promotion is valid from Tuesday until Sunday.

You can adjust the weeks in both From day and To day. If you e.g. adjust the week in From day to "-1", the promotion will start a week earlier and if you select "1" in To day, the promotion will end a week later.

### Delivery

In Delivery you can copy the delivery profile from the first marked promotion to the other marked promotions.

In "To these promotions" you can select the promotion ID for the promotions, you want to copy the delivery profile to.

### Baseline effect

In Baseline effect you can replace any existing baseline profile. However, this is only possible if you have promotions with the same customers.

### Replace products

In Replace products you can replace an outgoing product with a new one. In Find what you click Browse and select the products you want to replace with new ones.

In Replace with you select the new products, you want to replace the old ones with.

When you have chosen the products, you can adjust the forecast %.

*Read the important general notice in the info box to the left, before replacing products.*

### Reapply selection

In Reapply selection you can reapply selection to the selections on the promotion.

If the selection has changed, products will be added or removed. Also, volumes will be adjusted if there has been any changes to these on the promotions.

Click Reapply to re-apply selection to the promotions. A pop-up window appears asking if you want to edit the selections. Click Yes.

*Read the important general notice in the info box to the left, before reapplying selections.*

### Reapply allocation keys

In Reapply allocation keys you can reallocate the units on the promotions you have selected according to the current allocation keys.

Click Reapply to reapply the allocation keys for the marked promotions.

Promotion | Delivery | Baseline Effect | Replace products

Name:

KAM:

State:

Type:

Purpose:

Media:

From day:  Adjust week:

To day:  Adjust week:

Promotion | Delivery | Baseline Effect | Replace products | Reapply selection

**Please note:** This function copies the delivery profile from the first selected promotion to the other selected promotions.

Copy delivery profile from 456:

Week  %

Display

SKU

No product specific profiles or "delivery date overrides" will be copied.

To these promotions:

458,459,460,462,464,468,436

Promotion | Delivery | Baseline Effect | Replace products | Reapply selection | Reapply spectre

Customer  From  To  Cannibalization...  Halo %

**Please note:** This function replaces any existing baseline profile. "From" and "To" are numbers of days relative to the first "instore date" of each promotion.

Cancel Update

Promotion | Delivery | Baseline Effect | Replace products | Reapply selection | Reapply spectre

Find what  Browse

Options: Adjust forecast +/- %

Replace with  Browse

Promotion | Delivery | Baseline Effect | Replace products | Reapply selection | Reapply spectre

This function will update the selections on the chosen campaigns. When you press "Reapply" BMS will show you how many selections will be affected and ask for confirmation.

**Please note:** This functionality will add/remove products if the selection has changed since it was applied to the campaign. When products are added, the discount and retail price setting will be copied from the first product in the existing selection.

Cancel Reapply

Promotion | Delivery | Baseline Effect | Replace products | Reapply selection | Reapply spectre

This function will reallocate the units on the campaign according to the current spectre.

Cancel Reapply

## Replace a product in future promotions

You can use the Replace products functionality to replace products in future promotions. This can be useful if one of the products in the promotion is discontinued. Then you can replace it with another.

### 1 Open Promotion list

In the ribbon: Click Promotions and Promotion list.

### 2 Open Edit promotions window

Click the product you want to replace, and click Edit in ribbon. A pop-up window appears. Select Replace products in top menu.

### 3 Find products

Click Browse next to find to replace a product with another. A pop-up window appears. Select the product(s) you want to replace. Use Shift or Ctrl to mark more products, like in Excel. When you have marked the product(s), click Add and close to close the window.

Now, you should find the new products you want to replace the old ones with. Click Browse next to Replace with, and select the new product(s) the same way as before: Mark the product(s) and click Add and close.

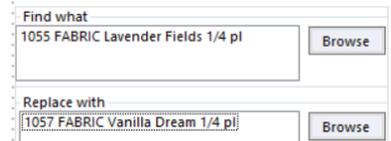
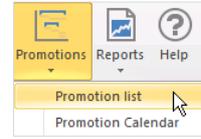
Click Replace to replace the old products with the new ones in the future promotion.

### 4 Add volume and allowance

Now, the promotions has been replaced. Go to the new products and add volume and allowances manually to the promotions.

### Adjust forecast

You can choose to adjust the forecast %. Use this functionality if you expect a different sale for the new product compared to the replaced product.



Product name	€ Promo Allow	Promotion volume
FABRIC Vanilla Dream	1,00	



## Printing a letter

### 1 Open promotion list

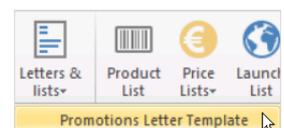
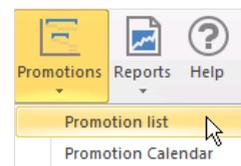
Open promotion list by clicking Promotions in ribbon and select Promotion list in the drop-down list.

### 2 Open promotion

Double-click the promotion to open it in a new tab.

### 3 Print to a letter

Click Letters & lists in View ribbon and select Promotions letter template to print the promotion to a letter.



You can setup an Excel template for when printing a letter.