

# Working with promotions

## Promotion calendar

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



Tips and tricks are marked with an Info-icon.

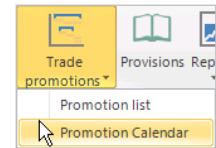


Questions & Answers note relevant to the topic at hand.

### 1 Open promotion calendar

In the ribbon: Click Promotions and Promotion Calendar.

Promotion Calendar opens in a new tab.

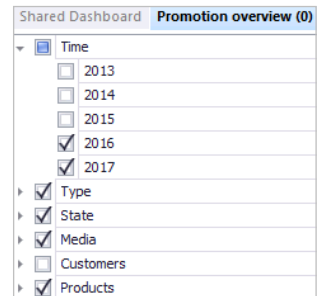
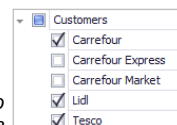


### 2 Filter the list

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 of the panel. Show panel by clicking the arrow again.*



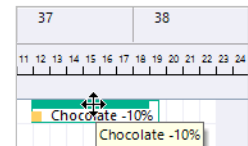
You have more options in promotion calendar. These options are defined in the next section.

## Navigating promotion calendar



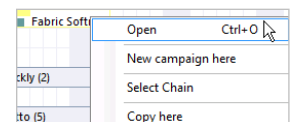
### Move promotions

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.



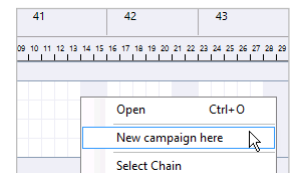
### Open promotion

Double-click on a promotion or Right-click and select Open. 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.



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

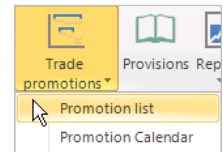
Promotion list

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.

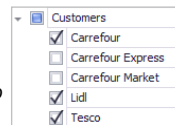
Promotion list opens in a new tab.



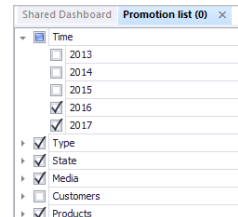
2 Filter the list

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

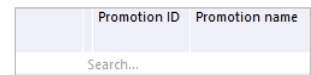


Navigating promotion list

i Search in the list

The first line under the Column headers is the search line. Type the search criteria in the field under any headline and BMS will filter the list.

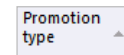
Tip: Check for more specific search options by clicking this button in the white field.



i Sort the list

The list can be sorted alphabetically or numerical in every column by clicking on a headline.

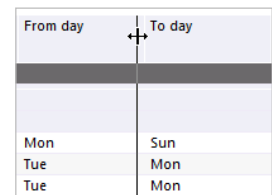
An arrow will be shown that changes up or down, when you click on the column. This sorts the list from A-Z or from the smallest value to the largest; and vice versa.



i 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.

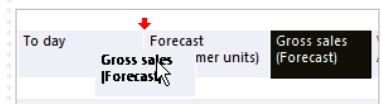
The cursor will be changes to a cross with two arrows, click and hold, pull the column to the wanted width. The width is changed.



i 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. Red arrows indicates where the movement will/can be placed.

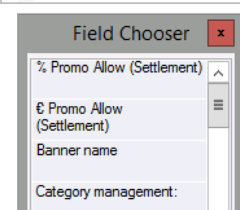
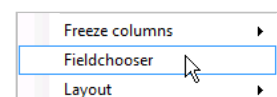


i Add or remove columns

Right-click anywhere in the list and choose Field Chooser.

Pull the wanted column to the placement you want and drop it between two other columns. Red arrows indicates where the movement will/can be placed.

Remove columns by pulling the column to Field Chooser.



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

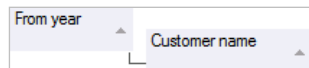
## Arrange lists

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.

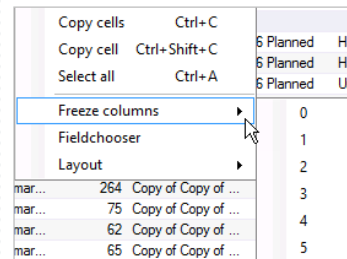
*Tip: You can arrange in more levels and create a hierarchy.*



## Freeze columns

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

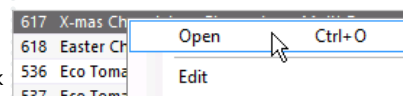
Right-click in the table: Choose Freeze columns and then choose the number of columns.



## Open promotion

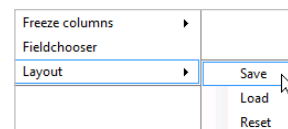
Double-click on promotion. Promotion opens in new tab.

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. If you do not Save Layout the Field changes you make will be until you close the tab only.



## 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

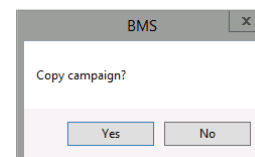
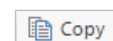
#### 1 Open promotion

Open the promotion either through promotion calendar or promotion list.

#### 2 Copy promotion

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

The copied promotion opens in a new tab.

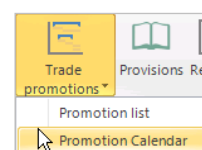


### Copy in promotion calendar

#### 1 Open promotion calendar

In the ribbon: Click Promotions and Promotion Calendar.

Promotion Calendar opens in a new tab.



## Quick guide for BMS



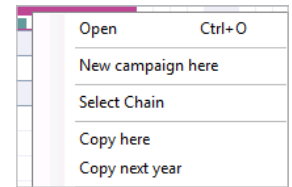
You can click F4 to open the edit promotions pop-up window.



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

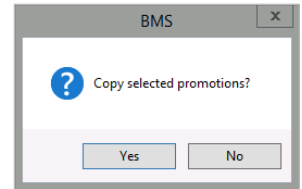
### 2 Copy promotion

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.



### 3 Verify

A window will pop-up to ask you to confirm the action. Click Yes and the copied promotion will appear under the original.

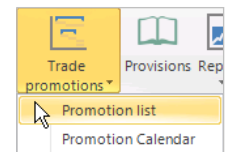


## Copy in promotion list

### 1 Open promotion list

In the ribbon: Click Promotions and Promotion list.

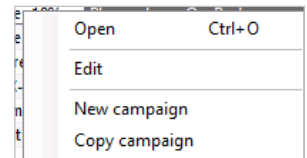
Promotion list opens in a new tab.



### 2 Copy promotion

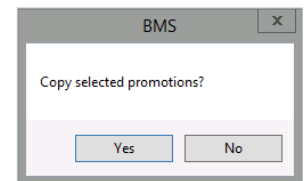
Copy promotion from promotion list by right-clicking and choose Copy campaign.

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.



### 3 Verify

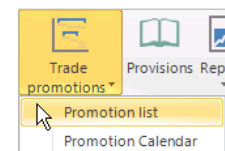
A window will pop-up to ask you to confirm the action. Click Yes and the promotion appears on the list as a copy of the original promotion.



## Edit several promotions in one go

### 1 Open promotion list

In the ribbon: Click Promotions and Promotion list.

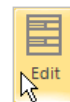


### 2 Select promotions for edit

Mark the promotions you want to edit. You can multi-select more promotions to edit.

### 3 Open edit promotion pop-up window

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

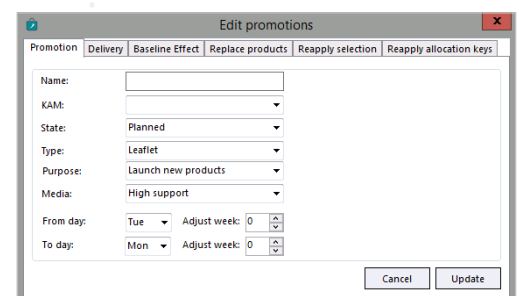


### 4 Edit promotions

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.



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.



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.



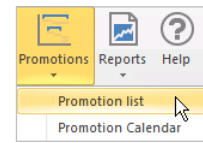
Be careful to **Replace products** and **Reapply selection** as changes to product selection and volumes will be applied if the allocation key has been changes since the units were added.

**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.

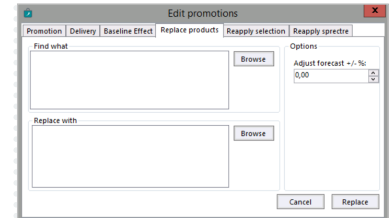
**1 Open Promotion list**

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.



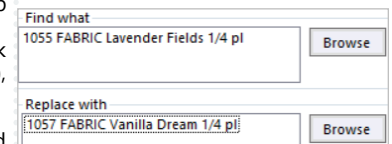
**3 Find products**

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.

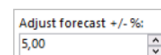
Go to the new products and add volume and allowances manually to the promotions.

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

**i Adjust forecast**

Now, the promotions has been replaced.

Go to the new products and add volume and allowances manually to the promotions.



**Printing a letter**

**1 Open Promotion list**

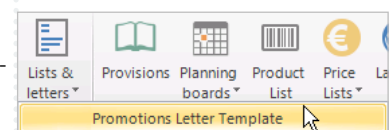
In the ribbon: Click Promotions and Promotion list.

**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.