

Sales Promotion & Purchase Allowance Import

Revision 1.6

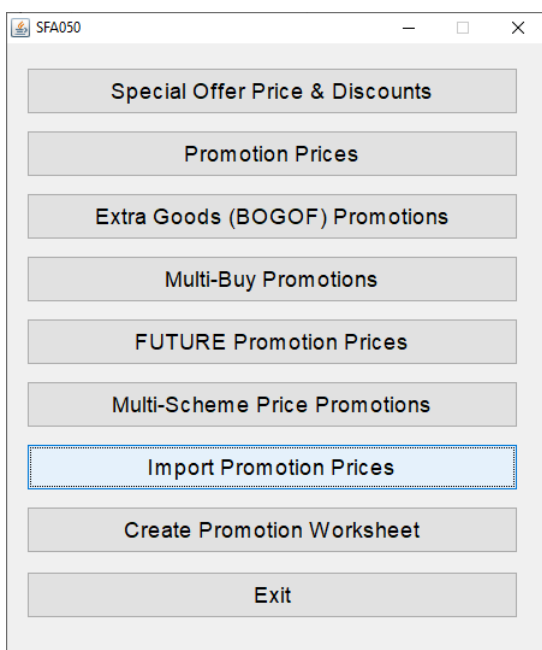
Date 24th February 2021

Overview

Promotion maintenance/ SFA050 has been enhanced to allow importing and exporting of sales promotional and purchase allowance data using MS Excel-compatible csv files. The exported product information is compatible with the promotion import format requirements, making it possible to export product data, edit that data to include promotion prices and then re-import to create price promotions.

The new functions require a graphical client and they will be most easily used if the promotions files are stored in a designated folder on the users PC.

On running SFA050 you will be presented with a new menu as follows;



Promotion options menu

Importing promotion prices and cost allowances

This option can be used to import data from a correctly formatted worksheet to automatically create price promotions.

The worksheet should be csv-formatted with column headings which match those in the following schedule;

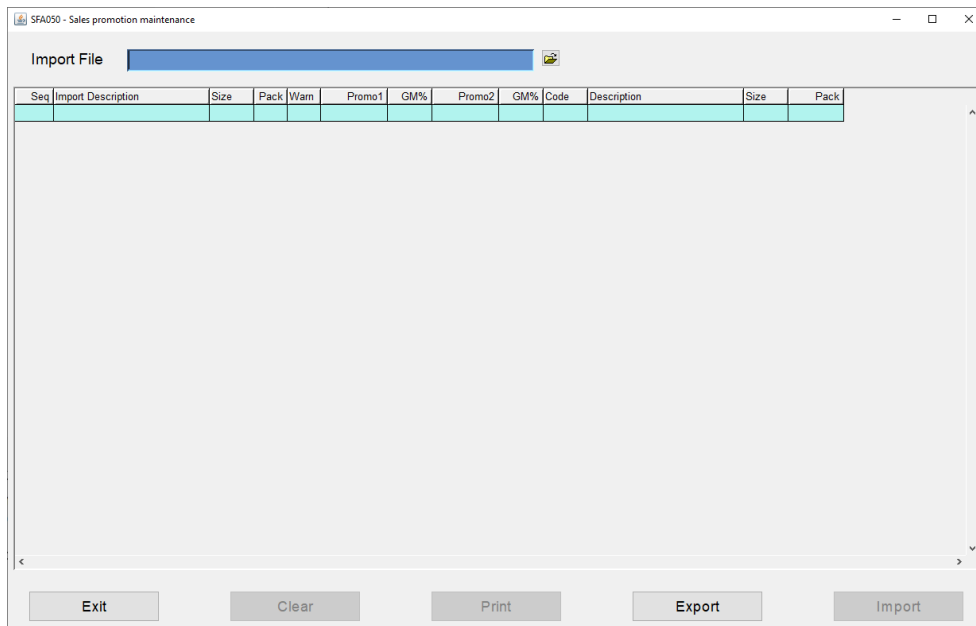
<i>Mandatory</i>	<i>Column heading</i>	<i>Format</i>	<i>Notes</i>
	Supplier	A6	Supplier code
	Description	A35	Product description
	Variant	A10	Product variant description (colour, flavour etc)
	Size	A6	Size description
	Pack	N4	Pack quantity
	Inner	A13	Inner bar code (EAN)
	Outer	A14	Outer bar code (PLU)
	Rsp	N5.2	Normal Retail selling price
	Unit	N5.2	Normal Unit selling price (ex VAT)
	Vat Rate%	N2.2	VAT rate%
	C&C Price	N5.2	C&C promotion price
	Del Price	N5.2	Delivered promotion price
	C&C Promo RRP	N5.2	C&C promotional RRP
	Del Promo RRP	N5.2	Delivered promotional RRP
	WholesalerCode	A13	Product code

Only columns 1-30 (A->AE) will be processed. Columns which do not contain one of the above headings or columns beyond column 30 (AE) will be ignored. The first column header **must** be "Supplier" otherwise the program will be unable to identify the positions of the other columns, which can be in any sequence.

If neither the inner (EAN), the outer (PLU) code nor the wholesaler code exist then it will not be possible for the program to match the imported product record, so preventing creation of the promotion line unless the operator manually matches the product record.

Importing Sales Promotions & Purchase Allowances

After selection of the Import Promotion Prices option the import file selection screen will be shown.



Import file selection screen

Either input the full file name (including folder path) or click the browser button to search for the required file.

After selecting a correctly formatted promotions file, the file contents will be loaded, and the program will attempt to match the supplied products with those within your SWORDS database.

When importing the promotion prices from the CSV file, warnings can be highlighted on the screen as below:

- Warning E EAN code is on the spreadsheet, but it does not match the EAN code of the product
- Warning P PLU code is on the spreadsheet, but it does not match the PLU code on the product
- Warning L If a non-zero list price is on the spreadsheet but it does not match the list price on the product
- Warning B If an allowance with a start and end date is on the spreadsheet (type 2) and an allowance already on the product with an end date greater than the start date of the spreadsheet allowance is better than what is on the spreadsheet.

If a line is double-clicked, then further details relating to the spreadsheet are displayed. This screen has a button "Product details" which when clicked will display product master information.

The match process will use the supplied inner, outer barcodes and wholesaler code to try to match those to the correct product using your existing SWORDS code data. Products which have been matched will show your product code and description on the right of the screen whereas unmatched products will show nothing to the right of the supplied product information.

You may double-click a product line to complete the matching process, or you could leave the product unmatched if it is for a line which you either elect to not promote or if the line is not stocked.

When reviewing the products on this screen, be sure to check the product packing sizes in case incorrect barcodes have caused inappropriate product matches.

Importing Sales Promotions & Purchase Allowances

SFA050 - Sales promotion maintenance

Import File: D:\Work\Demo\salesandbuyinupload.csv

Seq	Import Description	Size	Pack	Wam	Promo1	GM%	Promo2	GM%	Code	Description	Size	Pack
1	BANROCK STATION RESERVE	75CL	6	L	0.00	0.00	0.00	0.00	600004	BANROCK CABERNET SHIRAZ	75CL	6
2	BANROCK STATION RESERVE	75CL	6	L	0.00	0.00	0.00	0.00	600001	BANROCK CHARDONNAY VER	75CL	6
5	HARDYS NOTTAGE HILL 6X75C	75CL	6	L	0.00	0.00	0.00	0.00	600905	HARDYS NOTTAGE HILL	75CL	6
6	HARDYS NOTTAGE HILL 6X75C	75CL	6	L	0.00	0.00	0.00	0.00	600906	HARDYS NOTTAGE HILL CHARI	75CL	6
3	BANROCK STATION RESERVE				0.00	0.00	0.00	0.00	***	*** Unmatched Product		1
4	BANROCK STATION RESERVE				0.00	0.00	0.00	0.00	***	*** Unmatched Product		1
7	HARDYS NOTTAGE HILL 6X75C	75CL	6		0.00	0.00	0.00	0.00	***	*** Unmatched Product		1
8	HARDYS NOTTAGE HILL 6X75C	75CL	6		0.00	0.00	0.00	0.00	***	*** Unmatched Product		1
9	HARDYS NOTTAGE HILL 6X75C	75CL	6		0.00	0.00	0.00	0.00	***	*** Unmatched Product		1
10	HARDYS NOTTAGE HILL 6X75C				0.00	0.00	0.00	0.00	***	*** Unmatched Product		1
11	HARDYS NOTTAGE HILL 6X75C				0.00	0.00	0.00	0.00	***	*** Unmatched Product		1
12	HARDYS NOTTAGE HILL 6X75C				0.00	0.00	0.00	0.00	***	*** Unmatched Product		1
13	HARDYS VR 6X75CL CABERNE	75CL	6		25.49	3.49	0.00	0.00	***	*** Unmatched Product		1
14	HARDYS VR 6X75CL CABERNE	75CL	6		25.49	3.49	0.00	0.00	***	*** Unmatched Product		1
15	HARDYS VR 6X75CL CHARDON	75CL	6		25.49	3.49	0.00	0.00	***	*** Unmatched Product		1
16	HARDYS VR 6X75CL MERLOT	75CL	6		25.49	3.49	0.00	0.00	***	*** Unmatched Product		1
17	HARDYS VR 6X75CL PINOT GRI	75CL	6		25.49	3.49	0.00	0.00	***	*** Unmatched Product		1
18	HARDYS VR 6X75CL SAUVIGNO	75CL	6		25.49	3.49	0.00	0.00	***	*** Unmatched Product		1
19	HARDYS VR 6X75CL SHIRAZ	75CL	6		25.49	3.49	0.00	0.00	***	*** Unmatched Product		1
20	HARDYS VR 6X75CL				0.00	0.00	0.00	0.00	***	*** Unmatched Product		1
21	HARDYS VR 6X75CL				0.00	0.00	0.00	0.00	***	*** Unmatched Product		1
22	HARDYS CREST 6X75CL CABE	75CL	6		28.99	3.27	0.00	0.00	***	*** Unmatched Product		1
23	HARDYS CREST 6X75CL CHARI	75CL	6		28.99	3.27	0.00	0.00	***	*** Unmatched Product		1
24	HARDYS CREST 6X75CL ROSE	75CL	6		28.99	3.27	0.00	0.00	***	*** Unmatched Product		1
25	HARDYS CREST 6X75CL				0.00	0.00	0.00	0.00	***	*** Unmatched Product		1
26	HARDYS CREST 6X75CL				0.00	0.00	0.00	0.00	***	*** Unmatched Product		1
27	HARDYS CREST 6X75CL				0.00	0.00	0.00	0.00	***	*** Unmatched Product		1

Buttons: Exit, Clear, Print, Export, Import

Matched products review screen

If a product needs to be altered, double-click on the product line and change the product description. This screen can also be used to edit the product cost allowances to reflect the buy-in promotional deal.

SFA050 - Sales promotion maintenance

Description: BANROCK STATION RESERVE 6X75CL

PLU:

EAN:

Buy In

List Price: Allowances

Bonus:

Retro 1:

Retro 2:

Nett Cost:

MUP Chardonnay Verdelho

Sell Out

Price 1:

Price 2:

RRP:

Code: 6015

Description: BANROCK STATION RESERVE Size: 75CL Pack: 0006

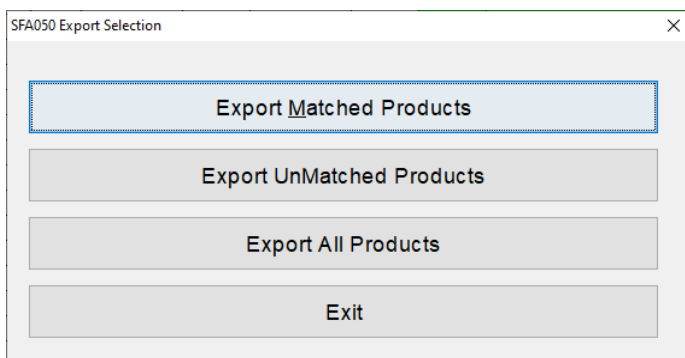
Buttons: Exit, Clear, Product Details, Update

Product match editing

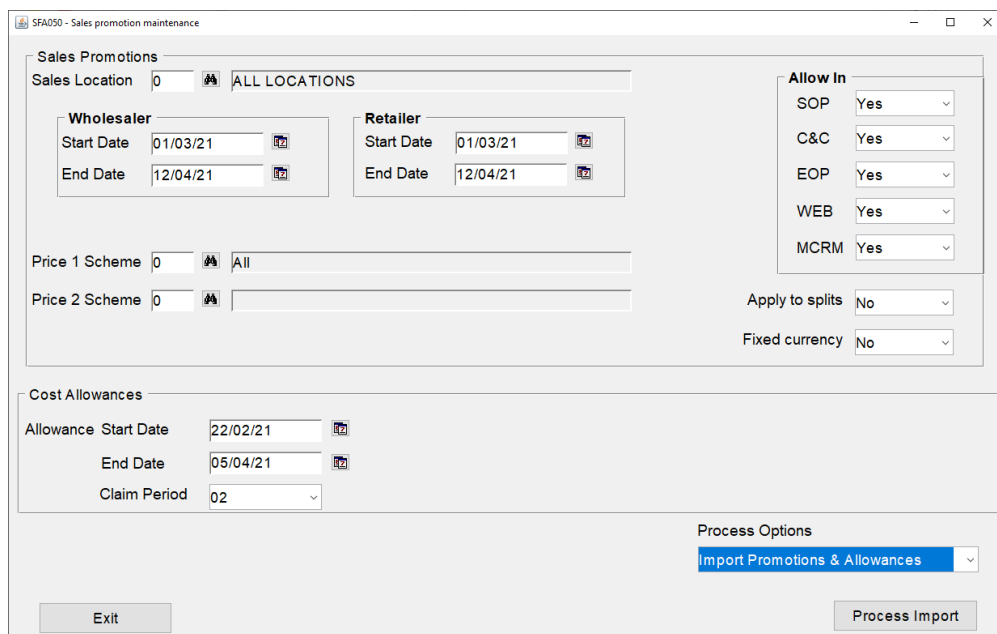
When editing is complete, click Update to save the changes. You may print the promotion information using the 'Print' button, or re-export the data to MS Excel by selecting Print followed by the Excel option.

If required the export option can be used to output matched products, unmatched products or All products. This spreadsheet can be split between the relevant buyers to update their product range.

Importing Sales Promotions & Purchase Allowances



When you are happy that all the promotions are appropriately matched click the Import button to commence the promotion creation process. You will be prompted to select some important criteria which applies to all the imported promotions. When you click the Create Promotions button the promotions will be created as Future Price Promotions. They may then be edited individually using the normal Future Price Promotion functions (see initial menu). It is strongly recommended that you review the promotions prior to their commencement date to satisfy yourself that they have been imported as intended.



Final promotion update

Create promotion worksheet

This option can be used to create a promotion worksheet that can be edited using MS Excel and then re-imported to create promotions using the Import Promotion Prices option (see above). This option requires access to MS Excel.

You will be able to select products using;

- Supplier
- Product category
- Product department
- Product group

You must select both a minimum and maximum value for each of the range selections. After selection, an MS Excel-compatible csv file will be produced and opened within MS Excel. The following columns will be available;

<i>Column heading</i>	<i>Format</i>	<i>Notes</i>	
Supplier	A6	Supplier code	
Description	A35	Product description	
Size	A6	Size description	
Pack	N4	Pack quantity	
Inner	A13	Inner bar code (EAN)	
Outer	A14	Outer bar code (PLU)	
Normal Invoice	N6.3	Normal invoice cost	
Bonus Off Invoice	N6.3	Supplier discount value	
Sett Discount	N6.2	Supplier settlement discount value	Blank
National Retro Bonus	N6.3	Retro bonus value	Blank
Nett Cost	N6.3	Nett invoiced cost	Blank
PlofPrice	N6.2	Standard selling price	
Rsp	N5.2	Normal Retail selling price	
Unit Price	N5.2	Normal Unit selling price (ex VAT)	
C&C Price	N5.2	C&C promotion price	Blank
C&C Price %GP	N3.2	C&C gp%	Blank
C&C Price Retail Margin	N3.2	C&C retailer margin	Blank
Del Price	N5.2	Delivered promotion price	Blank
Del Price %GP	N3.2	Delivered gp%	Blank
Del Price Retail Margin	N3.2	Delivered retailer margin	Blank
Vat Rate%	N2.2	VAT rate%	
C&C Promo RRP	N5.2	C&C promotional RRP	Blank
Del Promo RRP	N5.2	Delivered promotional RRP	Blank
WholesalerCode	A13	Product code	
Department	A30	Department code/description	
Group	A30	Group code/description	
SubGroup	A30	Sub group code/description	
PalletQty	N5	Pallet quantity	
LayerQty	N5	Layer quantity	
Sales 1-12	N6 x 12	Sales quantities – months -1 -> -12	

The blank columns are intentional, allowing the resultant spreadsheet to be used to create promotions, for example by a supplier.

Importing Sales Promotions & Purchase Allowances

The worksheet may be edited, and columns removed or re-organised. So long as the headings are not altered it may then be re-imported to create the promotions

Create purchase cost allowance worksheet

Follow the same process as creating a promotion worksheet, except for selecting worksheet format 1 – Extended. The columns below (BU->CD) should be populated.

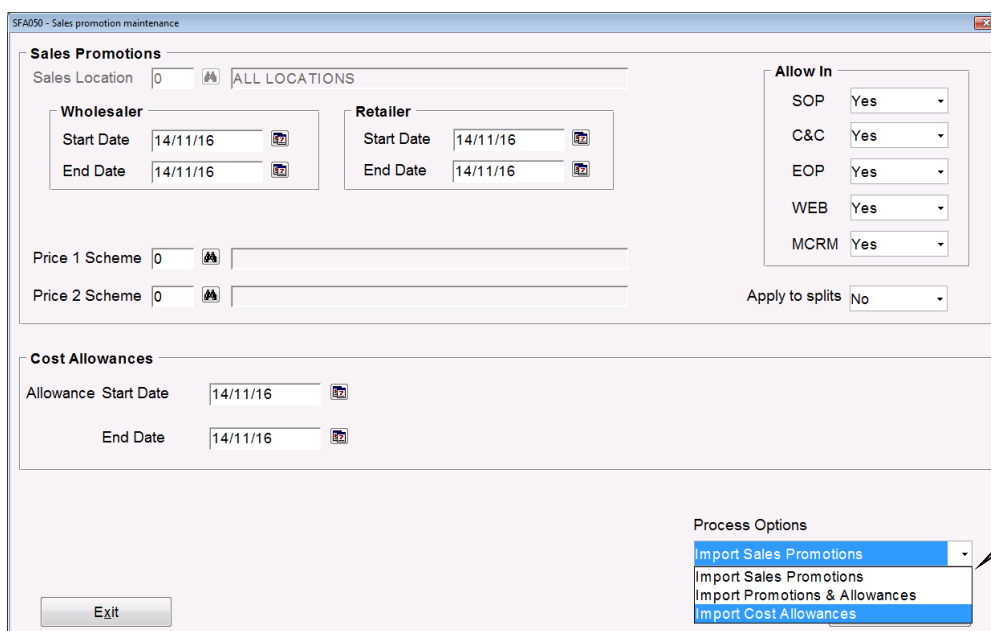
BU	BV	BW	BX	BY	BZ	CA	CB	CC	CD
AllowStartDate	AllowEndDate	AllowCode1	AllowAmt1	AllowCode2	AllowAmt2	AllowCode3	AllowAmt3	AllowCode4	AllowAmt4

Column heading	Format	Notes
AllowStartDate	DD/MM/YY	If different from Allowance Start date on front screen
AllowEndDate	DD/MM/YY	If different from Allowance End date on front screen
Allowcode1	N2	Allowance code linked to Allowance Amt 1
AllowAmt1	N5.2	Allowance value linked to Allowance code 1
AllowCode2	N2	Allowance code linked to Allowance Amt 2
AllowAmt2	N5.2	Allowance value linked to Allowance code 2
Allowcode3	N2	Allowance code linked to Allowance Amt 3
AllowAmt3	N5.2	Allowance value linked to Allowance code 3
AllowCode4	N2	Allowance code linked to Allowance Amt 4
AllowAmt4	N5.2	Allowance value linked to Allowance code 4

Importing purchase cost allowances

This option can be used to import data from a correctly formatted worksheet to automatically create purchase allowances.

The first column header **must** be “Supplier” otherwise the program will be unable to identify the positions of the other columns, which can be in any sequence.



Process option: Import Promotions & Allowances if you want to upload both sales promotions and purchase allowances together **OR** if you only want to import purchase allowances select Import Cost Allowances