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Category	Product
Course	Pricing
Version	1.0
Client	Generic
Software	2.15.8

Lead In/Lead Out Promotions

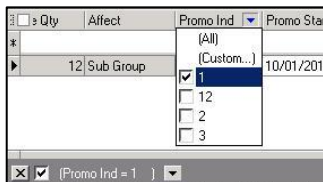
Use the utility to create lead-in or lead-out promotions when an entered supplier deal (promo buy) starts earlier or runs longer than the associated promotion sell period, & the supplier hasn't reduced the retail price during the gap.

Hints and Tips

- ✓ The utility allows you to decide what to do with the promotion buy period – pocket the savings or pass some of it onto the customer.
- ✓ Refer to the [PRO-2i- BPM Create Bulk Promotions or Deals Fact Sheet](#) & the [PRO-2k BPM Enquiry Fact Sheet](#) for general hints and tips about using the utility, and the data retrieved.

Filtering:

- Locks are only applied to filtered rows that are still visible.
- Click the [x] to clear the filter.



- ✓ Create lead promotions in logical batches:
 - **Scope:** (HOS only) what stores the promotion applies to.
 - **Promo Ind.** use codes that relate to a certain type of scope, for easier identification.
 - **Affect:** what products receive the promotion; a sub range promotion excludes any logically deleted products.
 - **Zones for GP Calc:** (multi-zone HOS user only) which zone is used to populate the regular retail, cost and GP columns.

Procedure to Create a Lead in/Lead Out Promotion

<p>1. From the HOS/BOS computer Windows desktop:</p> <ol style="list-style-type: none"> double-click the SUREfire HOS/BOS folder. double-click BulkPromoMaint.exe. Enter your HOS/BOS User name & Password, and then click OK. <p><i>*The application opens.*</i></p>	
<p>2. Click Lead In/Out.</p>	
<p>3. Complete the following steps to retrieve the promotions you want to back onto:</p> <ol style="list-style-type: none"> Click the Home tab. Enter the required Year, Week or Start Date to retrieve all promotions that are active during this week. Select Promotions. Optionally enter the Max Days, select a Department, Indicator, held Status, and/or Loyalty Pricing to return matching records. <p><i>*Use Max Days to filter out any promotions that run longer than the number entered.*</i></p> <ol style="list-style-type: none"> Click Load. <p><i>*The bottom left of the screen indicates how many records were found.*</i></p>	
<p>4. It's recommended that you reduce the grid to only the products you want to work on:</p> <ul style="list-style-type: none"> • Sort by the Cost Reduction % column, to see which deals offer the greatest cost saving. • Select row/s to remove, and then click Remove Rows (on the File tab). • And/or use the filter function to hide rows; i.e. filter by Promo Ind. 	

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Hints and Tips

- ✓ Use a **Promo Ind.** that clearly identifies that it's a leading promotion, e.g. [LP...].
- ✓ **Date guidelines:**
 - The **start & end** dates default to fall either side of the deal & the promotion sell period, with no overlap; starting at 00:00:01 & ending at 11:50:59.
 - You can change the dates.
 - Many suppliers end a deal on a Thursday/Friday. If the lead out gap is less than 7 days, the lead out dates will default to the promotion end date, to discourage a promotion.
 - The **Start & End Dates** are also the same if there's either no deal or no gap; a promotion won't be created for this product when you click **Save**.

Week 1	Week 2	Week 3
Lead-in promotion	Promotion during week 2	Lead-out promotion
Deal starts week 1 & ends week 3		

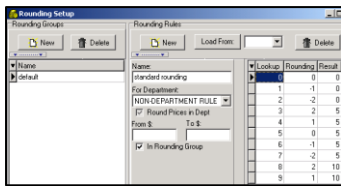
- ✓ You calculate a lead-in/lead-out promotion price as either:
 - a **percentage** of the deal saving off normal retail price (maintains dollar margin), which is per unit and calculated as [**Reg. Cost** minus **Promo Cost**], where Promo Cost equals

$$\frac{[\text{Reg. Cost} \times \text{Case Qty}] - \text{Deal Total Cost}}{\text{Case Qty}}$$
 - a nominated dollar **retail** amount off the normal retail price [**Reg. Ret inc. GST**].
- ✓ **Promo retail options:**
 - A **deal reflect** price uses the regular GP and the difference between the Reg. Cost and Deal Cost to maintain the GP.
 - If a product belongs to a subrange, the promo retail automatically applies to all the products shown in the grid that belong to the same sub-range & have the same UPP; if you change the price of one it'll update all. This logic applies regardless of the **Affect** you selected at step 6.

<p>5. If a HOS user, select the Scope (stores) that the promotion will apply (via the Home tab). <i>*If a list is displayed, select the check box/es for the specific location/s to include.*</i></p>							
<p>6. Select the required Affect:</p> <table border="1"> <thead> <tr> <th>Select:</th> <th>to apply the pricing:</th> </tr> </thead> <tbody> <tr> <td>Current Items EANS</td> <td>only to the products in the grid.</td> </tr> <tr> <td>Sub Range EANS</td> <td>to <u>every</u> active product that belongs to the sub range/s listed in the grid, which has the same units per pack. <i>*The products for a selected sub range are listed in the Items to be applied box.*</i></td> </tr> </tbody> </table>	Select:	to apply the pricing:	Current Items EANS	only to the products in the grid.	Sub Range EANS	to <u>every</u> active product that belongs to the sub range/s listed in the grid, which has the same units per pack. <i>*The products for a selected sub range are listed in the Items to be applied box.*</i>	
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<p>7. If a HOS user, select the applicable Zones for GP Calc. <i>*This field isn't applicable for a HOS-driven single zone business, and isn't used for a BOS user.*</i></p>							
<p>8. If applicable, select a Loyalty Pricing level to only offer the promotions listed to this customer group.</p>							
<p>9. To set: the same parameters for a group of products in the grid <i>(you can still overtype individual rows afterwards, if you unselect the applicable Lock)</i></p> <p>then: click the Locks tab. Select the Select check box against the products you want to bulk edit. In the applicable Lock fields, type or select the required values; change the Promo Ind. Select the corresponding Lock check box/es. <i>*The grid is populated.*</i></p> <p>parameters row by row (the applicable Lock check-boxes must be unselected)</p> <p>in the grid, enter the required value/s in the:</p> <ul style="list-style-type: none"> • Promo Ind • Lead-in/out Amount • Lead-in/out Date fields. <p><i>* Don't use a decimal for percentage.*</i> <i>*Leave the Promo Ret. field blank to apply a deal reflect price when you save.*</i> <i>* Click Promo Hold Set if you don't want <u>selected</u> promos to be exported to stores yet (HOS only).*</i> <i>*See Hints and Tips.*</i></p>	 						

Hints and Tips

- ✓ Locked check boxes (on the **Locks** tab) are cleared when you change tabs; this avoids accidentally applying a previous lock value to a new selection.
- ✓ You can add as many **rounding rules** as you want.



To add a rounding rule:

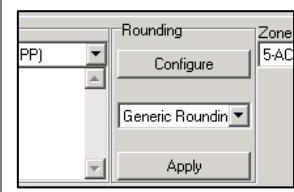
1. Click **Configure**.
2. If you need a new group click **NEW** Rounding Group & type a group name.
3. Click **NEW** Rounding Rule and type a **Name**.
4. Always select **Department: Non Department Rule**.
5. If applicable, set a from/to for the rule (to: is inclusive, e.g. 49.99, if you only want the rule to apply when the price is between x and y).
6. Tick **'in rounding group'**, to add this rule to the group selected in step 2.
7. Type the rounding amounts in the rounding column, 1 through to 99....
E.g. if a retail is 4.00 it will become 3.99.
8. The rule is auto-saved.

File	Home	Locks	UPP	Promo Ind	Promo Hold	Lead In	Lead Out	Cost Reduction	Lead In Start	Lead In End	Lead Out Start	Lead Out End	Lead Out Amount	Lead Out Promo Ret (U - no Tax)	Lead Out Dollar Saving	Lead Out GP			
1	LP44	Set	100			Percentage			12/11/2012	12/11/2012	12/11/2012	12/11/2012							
352431	KELL NUTRI-GRAIN-PALLE		86.1032	LP44					30/07/2012	12/08/2012	100.00	151.45	81.0511	19/08/2012	19/08/2012	100.00	151.45	1494.30	81.0511
654300	LEONOVIS VITAMIN C CRINE		76.7194	LP44					30/07/2012	12/09/2012	100.00	1.59	55.7126	19/08/2012	19/08/2012	100.00	1.59	2.20	55.7126
100000	LEONOVIS VITAMIN C CRINE		76.7194	LP44					30/07/2012	12/09/2012	100.00	1.59	55.7126	19/08/2012	19/08/2012	100.00	1.59	2.20	55.7126

10. If required, complete the following steps to apply **rounding** to the promotions:

- a. Click the **Home** tab.
- b. Click the **Select** check box against the applicable rows.
- c. Select the rounding rule to use.
- d. Click **Apply**.

The Promo Retail is updated.



11. Click **Save All**.

The grid is cleared if all rows saved successfully.
The system saves row by row, so if an error displays there's a problem with at least the top row in the grid; review the **Invalid Reason column.**

To:	then:
manage another lead in/out promo	click Clear Grid Return to step 3.
return to the bulk editing screen	click Return to Bulk Entry .
finish	click Close .

13. If you're a BOS user, promotional tickets are added to the 'promotions on' ticket printing.

Use the unique promo indicator you gave the leading promotions to identify them once you reach the indicator selection screen In Labels Wizard.

Tickets are still generated for Loyalty Level promotions; you can filter these out during label selection if you won't want them to print.

Refer to the [PRO-5i Print Promotional Labels by Indicator Fact Sheet](#).

