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Category	Product
Course	Pricing
Version	1.1
Client	Generic
Software	2.18.5

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.
  • If you filter by a column that you then edit (i.e. Promo ID), you must select the new filter option in order see the edited row/s.
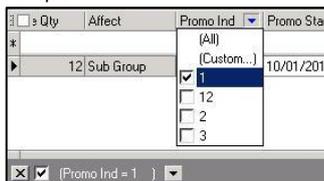
✓ Create lead promotions in logical batches:
  • **Scope:** *(HOS only)* what stores the promotion applies to.
  • **Promo Ind.** use codes that relate to a certain type of scope, for easier identification.
  • **Affect:** what products receive the promotion; a sub range promotion excludes any logically 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

1.	From the HOS/BOS computer Windows desktop: a. double-click the **SUREfire HOS/BOS** folder. b. double-click **BulkPromoMaint.exe**. c. Enter your HOS/BOS **User name** & **Password**, and then click **OK**. *The application opens.*	
2.	Click Lead In/Out.	
3.	Complete the following steps to retrieve the promotions you want to back onto: a. Click the **Home** tab. b. Enter the required **Year**, **Week** or **Start Date** to retrieve all promotions that are active during this week**.** c. Select **Promotions**. d. Optionally enter the **Max Days**, select a **Department**, **Indictor**, held **Status**, and/or **Loyalty Pricing** to return matching records. *Use **Max Days** to filter out any promotions that run longer than the number entered.* e. Click Load. *The bottom left of the screen indicates how many records were found.*	
4.	It's recommended that you reduce the grid to only the products you want to work on: • 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 **Prom Ind.** See Hints and Tips.	

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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

$$\frac{[\text{Reg.Cost x Case Qty}] - \text{Deal Total Cost}}{\text{Case Qty}}$$

   - 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.

5.	If a HOS user, select the **Scope** (stores) that the promotion will apply (via the **Home** tab). *If a list is displayed, select the check box/es for the specific location/s to include.*	

6.	Select the required **Affect**:	

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. *The products for a selected sub range are listed in the **Items to be applied** box.*

7.	If a HOS user, select the applicable **Zones for GP Calc**. *This field isn't applicable for a HOS-driven single zone business, and isn't used for a BOS user.*	

8.	If applicable, select a **Loyalty Pricing** level to only offer the promotions listed to this customer group.	

9.		

To set:	then:
the same parameters for a group of products in the grid *(you can still overtype individual rows afterwards, if you unselect the applicable **Lock**)*	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. *The grid is populated.*
parameters row by row (*the applicable **Lock** check-boxes must be unselected*)	in the grid, enter the required value/s in the: • **Promo Ind** • **Lead-in/out Amount** • **Lead-in/out Date** fields.

You must change something in the grid to enable Save; usually this is the Promo Ind.

* Don't use a decimal for **percentage.***

*Leave the **Promo Ret.** field blank to apply a **deal reflect** price when you save.*

*To NOT set a promotion for an item, leave the Amount blank and when you save, choose **No** when prompted to use the deal reflect price.*

* Click **Promo Hold Set** if you don't want <u>selected</u> promos to be exported to stores yet (HOS only).*

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Hints and Tips

✓ Locked check boxes (on the **Locks** tab) are cleared when you change tabs; this avoids accidently applying a previous lock value to a new selection.

✓ You can add as many **rounding rules** as you want.
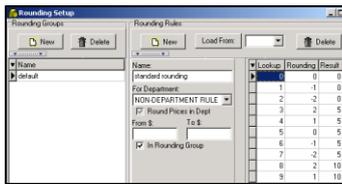
To add a rounding rule:

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.

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.* *If you left the **Amount** blank for any rows, you have the option to select **Yes**/ **Yes to all** to set a deal reflect promotion, or **No**/ **No to All** to ignore the suggested lead in/out promotion as indicated; you can select a combination of Yes/No/No to all/Yes to all, as the system only applies the chosen action one row at a time.* *The system saves row by row, so if an error displays there's a problem with at least the top row; review the **Invalid Reason** column.* *Items remain in the grid if no promotion was applied; these are the 'skipped' records.*

12.

To:	then:
Fix any errors	Refer to the **Invalid Reason** column; correct the error and resave, or ignore if you don't want a promotion for them.
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 lead 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.*

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