

**PRO-2i** Page| 1 of 4

Category	Product
Course	Pricing
Version	1.0
Client	Generic
Software	2.15.8

**Hints and Tips**

- ✓ Also refer to the [PRO-2k BPM Enquiry/Deletion Fact Sheet](#) and the [PRO-2j BPM Create Bulk Leading Promotions Fact Sheet](#).
- ✓ Records created in the utility:
  - are saved against a products default supplier.
  - start at 00.00.01 and finish at 11.59.59
  - display on the **Stock** screen (deal values will include GST).
- ✓ Use **Max Days** to filter out any promotions/deals that run longer than the number entered.
- ✓ When you **Load** a selected **Date**, the system returns:
  - all existing promotions (for the **Loyalty Pricing** level selected) that are active during the selected week; **Deal Promo Calc** must have been run to see imported data.
  - the 'best' deal with the same **scope** (or broadest scope if no match) that falls within the promotion; e.g. if you load by **Promotions**, a deal won't display if it ends before the promotion ends (if you need to review these deals, load by **Deal** instead).
- ✓ You can **Import** a spreadsheet created by yourself or a supplier.
  - contact SUREfire Support for a template the utility recognises.
  - The data must *exclude* GST.
  - A 'deal reflect' promotion retail may be auto-generated in the grid if the import data includes promotion dates, rounded to nearest 5 or 9 cents and based off the normal retail in the selected **Zone for GP calc**.

# Create or Edit Bulk Promotions or Deals

Use the Bulk Promo Maintenance utility to edit several products on one screen:

- Create a deal to add an additional deal component.
- Add non-catalogue promotions.
- Fix a promotion/deal saved with incorrect parameters.

## Procedure to Add or Modify a Promotion or Deal

<p>1. From the HOS/BOS Windows desktop:</p> <ol style="list-style-type: none"> <li>a. double-click the <b>SUREfire HOS (BOS)</b> folder.</li> <li>b. Double-click <b>BulkPromoMaint.exe</b>.</li> <li>c. Enter your HOS/BOS <b>User name &amp; Password</b>, and then click <b>OK</b>.</li> </ol> <p><i>*The application opens.*</i></p>	
<p>2. <b>To create/edit a promotion/deal:</b></p> <p>by typing the product/s</p> <p>off an existing promotion or deal record (you can still add/remove products after they load into the grid)</p> <p>click the <b>Home</b> tab.</p> <p>Enter the required <b>Year, Week or Date</b> to retrieve.</p> <p><i>*See Hints and Tips.*</i></p> <p>Select to retrieve either <b>Promotions or Deals</b>.</p> <p>Optionally enter/select other filters to narrow the results.</p> <p>Click  <b>Load</b>.</p> <p>Go to step 5.</p>	
<p>off an import file (you can still add/remove products after they load into the grid)</p> <p>click the <b>File</b> tab.</p> <p>Click  <b>Import</b>.</p> <p>Navigate to and open the file (either by searching or typing the filename).</p> <p><i>*A preview is displayed.*</i></p> <p>Select the file <b>Type</b>.</p> <p>Click  <b>Import</b>.</p> <p>Click <b>OK</b>.</p> <p><i>*The file is displayed in the grid; if there were errors, click <b>OK</b>,  <b>Clear Grid</b>, correct the file, and import it again.*</i></p> <p>Go to step 5.</p>	
<p><i>*The bottom left of the screen indicates how many records were retrieved.*</i></p>	

Hints and Tips

✓ Function buttons:

	Undoes the previous selection/data entry (one per click).
	The grid goes into search mode; click the cursor in a column (e.g. Stock Code), as you type, the cursor jumps to the match.
	Unselects all the <b>Lock</b> check boxes on the Locks tab.
	Clears the grid.
	<b>File</b> tab; save data to open in Excel.
	<b>File</b> tab; create a leading promotion.
	Search for a product to add to the grid.
	Switch to 'save as' mode; edits to existing records will save a new record rather than updating the existing one. You can also set the mode from the <b>File</b> tab. If you only change retail, it always saves in update mode. If no promo/deal exists, these save as new inserts.
	If the cursor is on the last row visible & you press <b>Enter</b> or <b>down arrow</b> , the screen will scroll down a full page & position the cursor at the top of the page.
	<b>File</b> tab; import a file. SUREfire must first map the spreadsheet template/s you'll use to the utility.
	<b>File</b> tab; removes highlighted rows from the grid.
	<b>File</b> tab; deletes selected rows; you confirm to delete the promo and/or deal.

3. Complete the following steps if you want to add products to the grid manually:

**To:** add a specific product  
**then:** at the top of the grid, click the **Stock Code** field in the 'Click here to add a new product' row.  
 Type the stock code.  
 Press **Enter**.  
*\*The product is added.\**

add a specific sub range of products (you can only work on **Affect single OR sub range** in the grid at one time)  
 at the top of the grid click the **Sub Range** field in the 'Click here to add a new product' row.  
 Type the sub range code.  
 Press **Enter**.  
*\*A sample active product in the sub range is displayed.\**  
*\*At step 6 you'll select **Affect** option **Sub Range EANS**.\**

search for a product or group of products to add to the grid  
 click from the quick menu bar or the **File** tab.  
 Type criteria in the applicable field/s; the search starts automatically.  
 Select required product/s and click **OR** click .

*\*Hold the **Shift** or **Ctrl** key down to select multiple products.\**  
 Click **Close** when ready to return to the grid.  
*\*The products are listed in the grid.\**

Go to Step 5.

4. Select the **Insert** check box if you want edits made to any existing records to save as new inserts from now on (rather than override).  
*\*See Hints and Tips.\**  
*\*You can switch between modes for each row.\**  
*\*Add the **New Deal** and **New Promo** columns to the grid to see how your data will save.\**



Stock Code	Stock Description

Size Description	Sub Range	UPP

**Add Products**

Search (F3)   Add (F4)   Add All (F5)   Clear Search (F5)

EAN Code       Stock Code  
 Description       Size Description  
 Supplier Name       Product Group  
 Supplier Code       Sub Range 02517

Stock Code	Stock Description	Size Description	Sub R
004907	COLG T/PASTE TOTAL WHITING	1160GM	02517
005505	COLG T/PASTE TOTAL ADV FRS	1160GM	02517
005571	COLGATE T/PASTE WHITING TAR	1160GM	02517

Clear   Add   Insert

Scope: All Stores   Affect: Current Item (Same UPP)

**Hints and Tips**

- ✓ You can only select one **Scope**, **Affect** and **Zone** for all the products listed in the grid.
  - **Scope:** the stores the pricing applies to.
  - **Affect:** the products that will receive the new pricing.
  - **Important:** If editing records originally created at **item** level, if you change the affect to sub-range it creates a **new** promotion/deal; so if you make a promotion dearer, the cheaper one will still apply.
  - **Zones for GP Calc:** which zone is used to populate the regular retail, cost and GP columns.
  
- ✓ **Greyed** fields are read-only. Data entry is also disabled when you **Lock** a field or use **Search**.
  
- ✓ Use the **Lock & Select** check boxes to bulk edit rows; this saves time when several products have the same values.
  - You can select a **Lock** check box before or after you select the **Select** check box.
  
- ✓ Sometimes a supplier gives you an **additional deal** on top of a hosted 'off invoice' deal; you create this in 'insert' mode, off the original deal.
  - If the product belongs to a subrange, then the deal will apply against all the products displayed in the grid that belong to the same sub-range.
  - Use **Deal Hold** if you don't want a deal to be exported to stores yet (HOS users only).
  
- ✓ **Types of deals:**
  - **Off Invoice:** The case discount that's reflected on the invoice.
  - **WW:** Warehouse Withdrawal ('buy' rebate). A case discount for purchases from the warehouse; follow business process to claim it.
  - **Scan:** ('sell' rebate). The dollar discount for every case sold; follow store process to claim.
  - **Note:** WW and Scan rebates will display as a deal in HOS Pricing; use MicroStrategy reporting to identify the rebate portion owing.

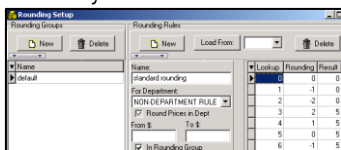
<p>5. If a HOS user, select the <b>Scope</b> the pricing applies to (via the <b>Home</b> tab).</p> <p><i>*Initial scope defaults to All Stores. If a list is displayed, you can select multiple location/s.*</i></p> <p><i>*Scope isn't used for a BOS user.*</i></p>																																																																																																																																																																												
<p>6. Select the required <b>Affect</b>:</p> <p><b>Select:</b>                    <b>to apply the pricing:</b></p> <hr/> <p><b>Current Items EANS</b>            only to the products in the grid.</p> <hr/> <p><b>Sub Range EANS</b>            to every active product that belongs to the sub range/s listed in the grid, which has the same units per pack.</p> <p><i>*The products for a selected sub range are listed in the <b>Items to be applied</b> box.*</i></p>																																																																																																																																																																												
<p>7. If a HOS user, select the applicable <b>Zones for GP Calc.</b> selection.</p> <p><i>*This also controls which supplier/stock code displays if there are different default suppliers across zones (important if a deal only applies to that supplier).*</i></p> <p><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, complete the following steps to create or edit a deal (depending on if the <b>Insert</b> check box was selected at step 4):</p> <ol style="list-style-type: none"> <li>Select the <b>Selected</b> check box/es against the products you want to bulk edit.</li> <li>On the <b>Locks</b> tab, in the <b>Off Invoice</b>, <b>WW</b>, or <b>Scan</b> lock field/s, type the case discount.</li> <li>Select the <b>Deal Start &amp; End Date</b> lock values.</li> <li>Type the <b>Deal Ind.</b> lock value.</li> <li>Select the corresponding <b>Lock</b> check box/es.</li> </ol> <p><i>*The locked values are populated against the selected products (row/s) in the grid.*</i></p> <p><i>*Alternatively, type values directly in each row; the <b>Lock</b> check box must be unselected (and you don't use the <b>Select</b> check box for this data entry).*</i></p> <p><i>* Locked check boxes are cleared when you change tabs; this avoids accidentally applying a previous lock value to a new 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**Hints and Tips**

✓ **Promotions:**

- If your business runs loyalty promotions, the selected **Loyalty Pricing** filters promo's on load, and sets the customer loyalty price for new or existing promotions.
- If the product belongs to a subrange, then the promotion retail automatically applies against all the products added to the grid that belong to the same sub-range and have the same UPP; if you change the price of one it'll update against all. This logic applies regardless of the Affect option selected at step 6.
- A **deal reflect** price uses the regular GP and the difference between the Reg. Cost and Deal Cost to maintain the GP.
- Use **Promo Hold** if you don't want a promo to be exported to stores yet (HOS only).
- If creating **overstock promotions**, add the deal associated with the original promotion; otherwise it will sell and report at wrong cost.

✓ You can add as many **rounding rules** as you want.



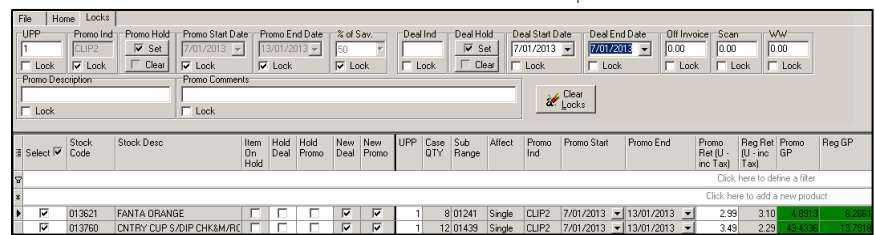
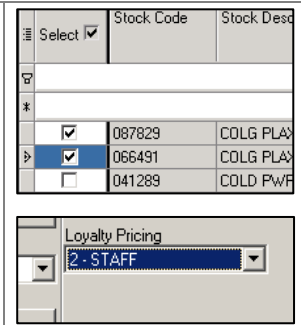
To add a rounding rule:

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.
8. The rule is auto-saved.

9. If applicable, complete the following steps to create or edit promotions (depending on if the **Insert** check box was selected at step 4).

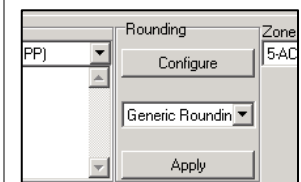
- a. Select the **Selected** column check box/es for the products to edit.
- b. On the **Home** tab, select the **Loyalty Pricing** level to apply against all items listed.
- c. Click the **Locks** tab.
- d. In the applicable **Promo** lock field/s above the grid, type or select the parameter/s to lock.
- e. Select the corresponding **Lock** check box/es.

*\*The locked values are populated against the selected products (row/s) in the grid.\**  
*\*Alternatively, type values directly in each row; the **Lock** check box must be unselected (and you don't use the **Select** check box for this data entry).\**  
*\*Leave the **Promo Ret.** field blank if you want to apply a **deal reflect** price when you save.\**  
*\*You can't save a promotion with a [0] new price.\**  
*\* Locked check boxes are cleared when you change tabs; this avoids accidentally applying a previous lock value to a new selection.\**



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 to apply the rule against.
- 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 an error displays, there's an error with at least the top row; review the **Invalid Reason** column.\**

12. **To:** manage another promotion or deal **then:** click **Clear**.  
 Return to step 2.  
 finish click **Close**.

13. BOS users: print any promotion tickets.  
*\*Refer to the [PRO-5i Print Promotional Labels by Indicator Fact Sheet](#).\**