Evaluating promotions

You can evaluate promotions manually and you can import promotion data to do your evaluation based on these. In both ways you have to enter the columns: Sell out (Consumer units), Forecast (units) and Retail price (planned).

Introduction

This Quick guide will show you how to evaluate promotions. The data that needs to be filled in is in sell out. In the end you have evaluated a promotion.

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.

Evaluate promotions manually

1 Open promotion list or calendar

Click Trade promotions in the ribbon and choose Promotion list or Promotion Calendar.
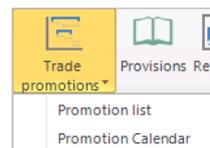
2 Open promotion

Choose the promotion you want to evaluate and double-click it to open or right-click and open.

3 Evaluate view

Click Evaluate in upper right corner of the tab to start the evaluation of the promotion.

4 Enter Sell out (Consumer units)

Enter how much you have sold in consumer units in Sell out (Consumer units).
You can mark more brands by holding down Shift or Ctrl and click Edit products or F4.

In the Edit pop-up window, you have three options. You can update one product at a time, by brand or all products in the promotion.
To update by brand, click the brand, select one of the brands from the field, click Edit products, and the products within this brand will all be updated in one go.
To update all categories, mark all products when clicking Edit products or F4.
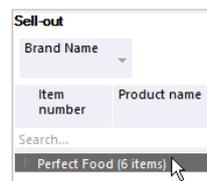
When you have marked more than one product (e.g. brand or all products) you can either enter Sell out pr. item or a total for the marked products.
When entering the volume Pr. item every single product you have marked, will be updated with the new volume.
If you enter in Total for selected, you enter a sum for the marked products. In this way, BMS will automatically divide the sum into the number of marked products.

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5 **Mass edit Retail offer price**

You can edit the Recommended retail price for every product to calculate the customer's economy.

You can choose to do this one by one if you want to. You can also update more products in one go by marking the products you want to change and click Edit products in the ribbon.
This functions the same way as editing Sell out (Consumer units).

Enter the forecasted units of products in the promotion in Forecast (units), and enter the price for each product in Retail price (planned). You can enter both the forecasted units and prices and the actual (sell out) units and prices.

6 **Evaluate Sell out in P&L**

Compare Sell out and Forecast in the P&L to check what you expected to sell and what you actually sold. In this way you can compare an older promotion with your new one.

Recommende retail price (RRP)

	Forecast:	Actual:
Multi-buy	2	2
Total retail price	50	50

P&L

	Total promotion			
	Forecast	%	Sell-out	%
	450.000		441.911	
Gross sales	12.105.000	100,0	11.887.406	100,0
Invoiced sales	12.105.000	100,0	11.887.406	100,0
Joint Marketing %	968.400	8,0	950.993	8,0
Loyalty %	1.210.500	10,0	1.188.741	10,0
Net sales	9.926.100	100,0	9.747.673	100,0
COGS	2.520.000	25,4	2.474.702	25,4
Tax	1.620.000	16,3	1.590.880	16,3
Distribution (Logistic) costs	112.500	1,1	110.478	1,1
Sales margin	5.673.600	57,2	5.571.614	57,2
Sales Contribution	5.673.600	57,2	5.571.614	57,2
Customer Revenue (excl. VAT)	7.182.000		8.816.124	
Customer cost of goods (excl. VAT)	0		0	
Customer Margin (excl. VAT)	7.182.000	100,0	8.816.124	100,0
Margin per unit (excl. VAT)	15,96		19,95	

Evaluate one promotion with CatMan import

1 **Open promotion for evaluation**

Click on Promotions in the ribbon and choose Promotion list, and a new tab opens.
Find the promotion on the Promotion list, double-click on the promotion, and it will open in a new tab.
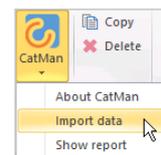
2 **Open evaluate window**

Click on the Evaluate view.

3 **Import data via CatMan**

Click on the CatMan icon in the ribbon and Import data.

The CMS import report window opens. Check that the numbers are ok. Click Import.

4 **Evaluate Sell out P&L**

BMS has generated a P&L for Sell out that can be compared to the forecasted.

Tip: In the Sell out window there is more information about sell out per product. You can adjust the promotion information if needed.

Sell-out

Brand

Item number	Product name

Forecast	%	Sell-out	%
10.000		35.001	
0		0	
100.000	100,0	350.010	100,0
100.000	100,0	350.010	100,0
10.000	10,0	35.001	10,0
5.000.000	5.000,0	17.500.500	5.000,0
25.000	25,0	26.000	7,4
-4.935.000	100,0	-17.211.492	100,0
42.119	-0,9	80.327	-0,5
2.500	-0,1	8.750	-0,1
-4.979.619	100,9	-17.300.568	100,5
-4.979.619	100,9	-17.300.568	100,5

CatMan Solution is a POS data management software.

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ⓘ CatMan Solution is a POS data management software.

ⓘ Mass edit Recommended retail price

You can edit the Recommended retail price for every product to calculate the customer's economy.

You can do it product by product or by marking more products in one go by marking the products you want to change and click Edit products in the ribbon or F4.
This functions the same way as editing Sell out (Consumer units).

Enter the units of products in the promotion in Promo: units, and enter the total price for the promotion in Promo: price (VAT incl). You can enter both the forecasted units and prices and the actual (sell out) units and prices.

6 Note down learnings

Note down evaluation learnings in the Evaluation notes field.

Tip: Use the field to maintain observations and conclusions from the campaign, while you remember it.

Evaluate more promotions with CatMan import

You can evaluate more promotions at a time with CatMan import. This functions almost the same way as evaluating one promotion.

1 Open promotions list

Click the Promotions icon in the ribbon and select Promotion list in the drop-down list.
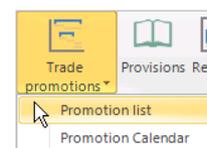
2 Mark promotions for evaluation

Mark more promotions by keeping down Shift or Ctrl - like Excel.

3 Import data via CatMan

Click on the CatMan logo in the ribbon and Import data.
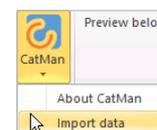
4 Open a promotion

Choose a promotion with imported data and open it by double-clicking it. The promotion opens in a new window.
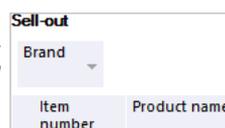Choose the Evaluate view in the upper right side of the tab to see the evaluated promotion.

5 Evaluate Sell out P&L

BMS has generated a P&L for Sell out, which can be compared to the forecasted.

Tip: In the Sell out window there is more information about sell out per product. You can adjust the promotion information if needed.

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Enter the units of products in the promotion in Promo: units, and enter the total price for the promotion in Promo: price (VAT incl). You can enter both the forecasted units and prices and the actual (sell out) units and prices.

Recommende retail price (RRP)	Forecast:	Actual:
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Total retail price	50	50

Get more insight

Baseline

BMS calculates the Baseline for your promotions based on the imported data from CatMan. It does this based on your sales.

Open CatMan report

Click the CatMan logo in the ribbon and Show report.
CatMan report opens in a new tab.

To the right there is an example of a report on 4 pages.

CatMan Solution is a POS data management software.
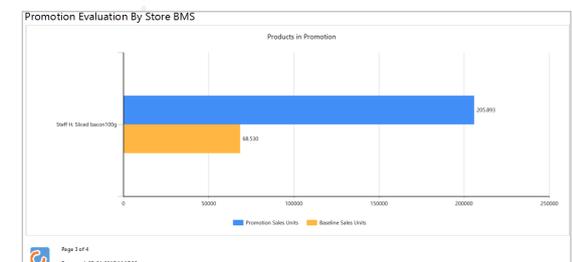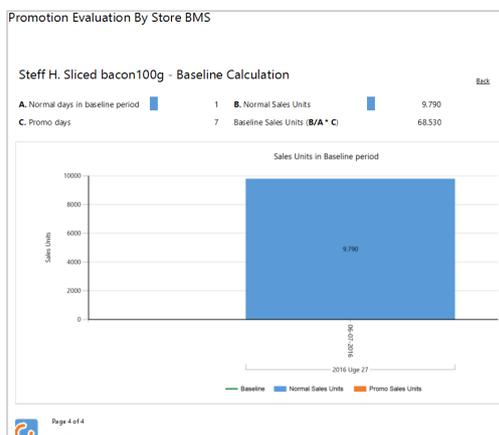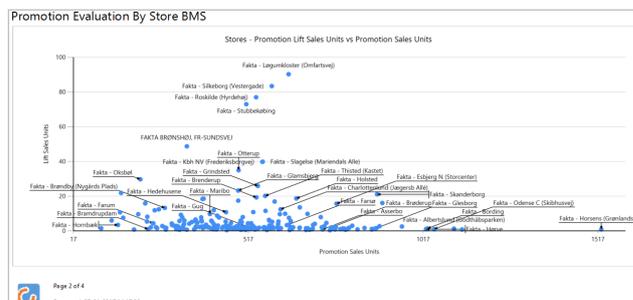
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How is Baseline calculated by CatMan import?

CatMan calculates the Baseline based on your sales. In System options you can select; 8, 12, 18, 26 or 52 weeks.

Can I evaluate the promotion based on sales to the stores?

Yes. Add sell in units under Settlement and see the P&L under settlement.