

# SYSPRO Trade Promotions

Applications and tools for managing trade promotions have never been more important. Over the last several years, consumer packaged goods companies have spent an average of 25% of their revenues on trade promotions, and this continues to grow. However, organizations are still using basic spreadsheets and pencil-and-paper to plan, execute and assess this increasingly vital sales strategy.

SYSPRO's comprehensive Trade Promotions functionality provides increased control and efficient management of your promotions, thereby reducing time-consuming reconciliations and improving accuracy and profitability. SYSPRO's solution gives you complete visibility across your internal and supply chain networks, enabling you to accurately target, forecast, plan, and execute successful trade promotions.

SYSPRO Trade Promotions enables quick identification of suitable items for promotion such as new, rebranded and seasonal items, slow movers, or those nearing expiry date.

## The benefits of Trade Promotions

- Streamlined promotion and deduction processing for industries selling through retail outlets, and the consumer packaged goods industry
- Improved visibility and invoice accuracy mitigates costly errors and write-offs
- Efficient reconciliation of accounts
- Single- and multi-level credit checking, with selective inclusion of outstanding deductions
- Pricing
  - Bracket pricing and discounts based on quantity, volume or weight
  - Automatic application of bracket pricing for incoming EDI orders
  - Pricing for product groups and delivery methods
- Flexible promotions
  - Promotion qualification by weight, volume or quantity

- Promotion reviews for applying paybacks by cash or credit
- Off-invoice allowances, accruals and free-goods promotions
- Price changes, line promotions or line discounts for off-invoice promotions
- Tracking of accrued promotions
- Associated Products discounting allowing the sale of an item to generate a discount on a different item
- Setting budget limits – one of the challenges with promotions is being able to limit the promotion to either a value or quantity of the promotion items being sold
- Promotion qualifications to simplify what can sometimes be reasonably complex – this enables companies to configure multiple selection criteria in order for the promotion to be applied to a sales order
- Deduction review and reconciliation
  - Resolution, write-off and matching of deductions to available accrued promotions for improved control
  - Automatic adjustments of accounts receivable invoices for streamlined processing
  - Automatic write-off of small amounts

## Trade Promotions features

- Configure promotions for either order date or requested delivery date ranges
- Recalculate line item pricing in order entry at any time to obtain group pricing
- Select to apply promotions to individual lines or entire orders
- Match accrued promotions with specific deduction codes
- Configure free goods promotions to supply ordered or specific stock, free or at a reduced price
- Product Class for free goods enabling the cost of the promotion to be integrated correctly into General Ledger

# SYSPRO Trade Promotions

- Budget limits can be set per promotion based on:
  - Value of promotion
  - Value of product
  - Quantity
  - Mass
  - Volume
- Associated products allows the sale of an item to generate a discount on a different item
- Promotion qualifications using secondary stock code and customer category selections
- Capture deductions at the time of accounts receivable payment processing
- Review, change and split deduction amounts among customers, and change deduction codes on a single screen
- Reinstate unauthorized deductions as accounts receivable debit memos
- Enter notes and maintain follow-up dates

The screenshot displays three windows from the SYSPRO Trade Promotions module:

- Promotion Review:** Shows a table of promotion items with columns for Customer, Invoice, Line, Original amount, Balance, Promotion, Deduction, Type, and Date.
 

Customer	Invoice	Line	Original amount	Balance	Promotion	Deduction	Type	Date
0000001	00000...	1	0.00	0.00	FREE1		Free Goods	09/04/2012
0000001	00000...	1	700.00	0.00	MONTHLY		Off Invoice	09/04/2012
0000001	00000...	1	70.00	70.00	SPKACCR	LOYALTY	Accrual	09/04/2012
0000001	00000...	1	140.00	140.00	LOYALTY	LOYALTY	Accrual	09/04/2012
- Deductions Review:** Shows a table of deduction items with columns for Payment customer, Deduction customer, Deduction code, Amount, Refe..., Status, Follow up date, Check no., Deposit date, Deposit time, Resolut..., and Date reat...
 

Payment customer	Deduction customer	Deduction code	Amount	Refe...	Status	Follow up date	Check no.	Deposit date	Deposit time	Resolut...	Date reat...
0000001	0000001	ADVERT	200.00	Special 30%... at extra... to store	Active	09/04/...	5432	09/04/...	10:21 PM		
- Promotion Codes:** Shows a table of promotion codes with columns for Promotion code, Description, Promotion type, Global promotion, Tiered, Start date, Expiry date, Date type, and Currency.
 

Promotion code	Description	Promotion type	Global promotion	Tiered	Start date	Expiry date	Date type	Currency
SPKACCR	Bike Sales accruals	Accrual	No	No	09/04/2012	30/11/2012	Request	\$
FREE1	Free 1 - move stock of bikes	Free goods	No	No	09/04/2012	31/08/2012	Request	\$
LOYALTY	Loyalty accruals	Accrual	No	No	09/04/2012	31/12/2012	Request	\$
MONTHLY	Monthly promotion	Off invoice	No	No	09/04/2012	31/08/2012	Request	\$
PROMO1	Promotion to move stock	Off invoice	No	Yes	09/04/2012	28/09/2012	Request	\$