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# Promo Opportunities

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Version 4.0 onwards

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March 2014

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## Promo Opportunity

The Promotion Opportunity module can be used in many ways. Its standard purpose is to display a list of future promotions that can be offered to the store/outlet manager or buyer to get agreement on whether the outlet will accept or reject these opportunities.

The screenshot shows the 'Opportunity' form in the Opmetrix App. The form is titled 'Opportunity: Fresha 20mtr Foil' and has a 'Promo Number: 1110073'. It contains several sections: 'Type' (Promo), 'Sub Type' (Bonus Offer), 'Objective' (Buy 11Ctns and Receive 1 Ctn free), and 'Description' (applies to all 20mtr range). There are also fields for 'Buy In Period' (Start: 07/01/2014, End: 20/03/2014) and 'Promotion Period' (Start: 01/01/2014, End: 20/03/2014). A 'Decision' dropdown menu is set to 'Decision', and there are fields for 'Status', 'Sek', and 'Weight'. Below these is a table with columns: Product Description, Break, Unit, TPR \$, Quantity, Spend \$, Free Stk, RRP \$, Position, and Ranged. The table has two rows: 'Berocca 15 - Tropical' and 'Fresha 20mtr Cooking Foil'. At the bottom, there is a 'Comment' text area and a 'Save' button.

Product Description	Break	Unit	TPR \$	Quantity	Spend \$	Free Stk	RRP \$	Position	Ranged
Berocca 15 - Tropical	0								<input type="checkbox"/>
Fresha 20mtr Cooking Foil	30	Ctn		11	80.00	1	4.40		<input type="checkbox"/>

Examples:

- New Product Launch – record which stores will accept or reject new products
  - Xmas Promotion - Offer a Xmas promotion with the ability to give away free stock or gifts
  - Hospitality Monthly Table Talker – lock in a monthly special with an outlet and prearrange cost/sell prices in store

The purpose of the Promotion opportunities module is to measure the success of a promotion and to ensure it was offered to the correct outlets. In addition by tracking Trade Spend\$ and Free Stock and gift, the cost of a promotion can also be measured.

**Actions** Review the Promotion details (Type, Objective,

Description, Dates and comment) and offer this opportunity in store. Record the decision and details.

**Decision** Accepted, Pending Rejected

**Status** Select the correct Status

**Display Type** If a display has been agreed, select the display type

**Stk Weight** If a stock weight for the display has been agreed enter the stock weight.

**Promo Period** These dates will either display as either fixed (non editable) or the end date of the agreed promotion can be entered by the user.

The next section of the Promo Opportunity enables product information to be recorded. This is not creating an order/invoice it is recording a product commitment

enabling forecast reports to be generated on the success of a promotion.

The screenshot shows the Opmetrix App interface with a central window titled 'Opportunity: Fresha 20mtr Foil'. The window contains the following fields and sections:

- Type:** Promo
- Sub Type:** Bonus Offer
- Objective:** Buy 11Ctns and Receive 1 Ctn free
- Description:** applies to all 20mtr range
- Buy In Period:** Start: 07/01/2014, End: 20/03/2014
- Promotion Period:** Start: 01/01/2014, End: 20/03/2014
- Decision:** (Dropdown menu)
- Status:** (Dropdown menu)
- Stk Weight:** (Text input)
- Promo Number:** 1110073
- Table:**

Product Description	Break	Unit	TPR \$	Quantity	Spend \$	Free Stk	RRP \$	Position	Ranged
Berocca 15 - Tropical	0								<input type="checkbox"/>
Fresha 20mtr Cooking Foil	30	Ctn		11	80.00	1	4.40		<input type="checkbox"/>
- Comment:** (Text input)
- Save:** (Button)

The left sidebar contains a menu with options: Sales, Store Menu, Surveys, Merchandising, Promotions, Objectives, Call Notes, Exit Store, and Action Menu. The right sidebar shows 'Opportunities' and 'Compliance' sections.

Each of the columns can be set to fixed or editable depending on the promotion.

**Break** The minimum qty that needs to be purchased in order to qualify for the promotion

**Unit** Unit of measure for the product

**TPR\$** The temporary wholesale price the outlet can purchase the product for

**Quantity** The forecast/intended qty the outlet will order

**Spend\$** The trade spend the outlet will receive

**Free Stk** The amount of free stock (if any) that will be given to the outlet

**RRP\$** the agreed price in store for the product.  
A comment can also be added to the promotion to record other details.

## Add Product

Optionally the Add product button may be enabled. This is used to add product line details to the promotion and is often used where promotions are flexible or change regularly Eg (Monthly Table Talker promotion).

## Add Gift

Gift lines display in red. Optionally the Add gift button may be enabled. This is used to add a gift to the current promotion

## Save

Once a Promo Opportunity has been saved it will automatically create a calling card with the details entered. *See example below.*

The screenshot displays the Opmetrix App interface on a mobile device. The top status bar shows 'Voda NZ', '8:57 am', and '96%' battery. The app header includes the 'Opmetrix' logo and a navigation menu with buttons for Sales, Store Menu, Surveys, Merchandising, Promotions, Objectives, Call Notes (highlighted), and Exit Store. Below the menu is an 'Action Menu' dropdown.

The main content area is titled 'Store: Pak N Save Hastings' and 'Call Notes'. It displays a list of call notes, each with a date, time, and details. The first note is dated '20/03/2014 08:43:08' and entered by 'Renee Heath'. It details a 'Promo Opportunity Of' for 'Fresha 20mtr Foil' with a contract signed on 01/01/2014, ending on 20/03/2014. The second note is dated '23/01/2014 09:56:15' and entered by 'Renee Heath', detailing a 'Completed Call' with 'Emily Waiti' for 'Merchandising'. The third note is dated '23/01/2014 08:41:59' and entered by 'Renee Heath', detailing a 'Completed Call' with 'Emily Waiti' for 'Competitor Check, Merchandising'.

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