



Trade Promotions

Objective

To solve complex business problems by managing Trade Promotions and Deductions with effective tracking of off-invoice allowances, promotion deductions and efficient reconciliations resulting in increased collections, cash flow and improved profitability.

The Value of Trade Promotions

- Specifically written for the Consumer Package Goods Industry and industries that sell through retail outlets that have to manage trade promotions and deductions
- Expanded specific pricing functionality
- Expanded Promotion functionality
- Expanded Deduction capture review and reconciliation functionality
- Invoice accuracy minimizes costly errors
- Improved visibility and ability to annotate transactions
- Minimized write-offs resulting from lack of visibility
- Increased profitability due to control of promotions and deductions
- Expanded specific Credit checking features
- Effective and efficient reconciliation of accounts
- Increase cash-flow by reducing problem accounts
- Effective single and multi-level credit checking
- Accrued promotions can be matched with specific deduction codes
- Free goods give flexibility of choice by allowing ordered stock or specific stock to be supplied free or at a reduced price
- Facilitate tracking of accrued promotions
- Promotion review allows payback by cash or credit
- All promotion types can apply to an individual line or to the whole order
- Automatic application of all qualified promotions for incoming SYSPRO EDI orders

Deduction capture with cash application

- Deductions captured at the time of A/R Payment processing
- Automatic adjustments of A/R invoices
- Review, change and split deduction amounts among customers and change deduction codes on one screen

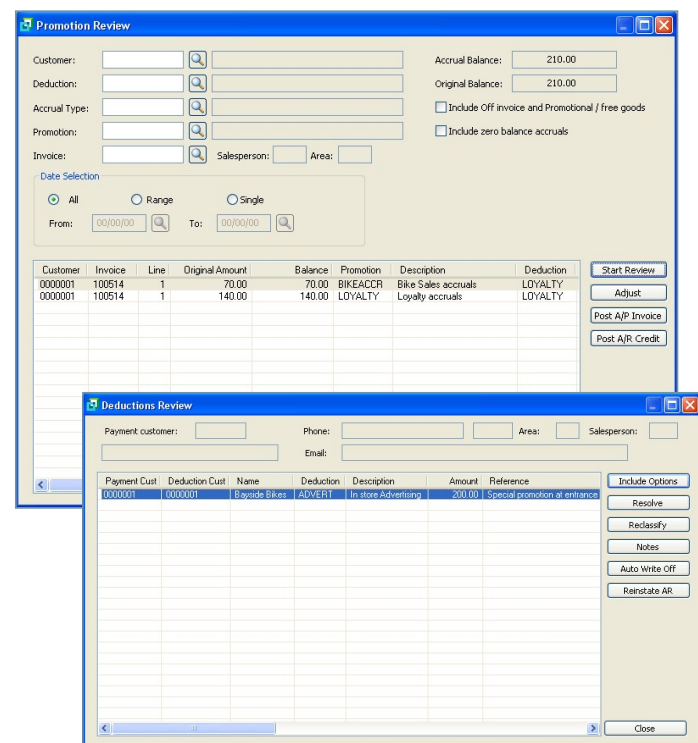
Complex Pricing

Pricing

- Bracket pricing on multiple levels based on quantity, volume or weight
- Pricing product groups may be defined
- Separate price groups may be setup for delivery or pickup
- Pricing groups can cover multiple line items in order entry, allowing prices to be recalculated at any time
- Recalculate line item pricing in order entry at any time to obtain correct group pricing
- Automatic application of bracket pricing for incoming SYSPRO EDI orders

Flexible promotions

- Ability to set up promotions for either order date or requested delivery date ranges
- Promotion qualification by weight, volume or quantity
- Promotions take the form of off-invoices allowances, accruals and free goods
- Promotions types can be designated as specific prices or percentage discounts
- Off-invoice promotions take the form of price changes, line promotions or line discounts



The image shows two overlapping software windows from SYSPRO. The top window is titled "Promotion Review" and contains fields for Customer, Deduction, Accrual Type, Promotion, Invoice, Salesperson, and Area. It also displays Accrual Balance (210.00) and Original Balance (210.00). There are checkboxes for "Include Off invoice and Promotional / free goods" and "Include zero balance accruals". A "Date Selection" section has radio buttons for "All", "Range", and "Single", with "From" and "To" date pickers. Below this is a table with columns: Customer, Invoice, Line, Original Amount, Balance, Promotion, Description, and Deduction. The table shows two rows of data. To the right of the table are buttons: "Start Review", "Adjust", "Post A/P Invoice", and "Post A/R Credit".

The bottom window is titled "Deductions Review" and contains fields for Payment customer, Phone, Area, Salesperson, and Email. It also has a table with columns: Payment Cust, Deduction Cust, Name, Deduction, Description, Amount, and Reference. The table shows one row of data. To the right of the table are buttons: "Include Options", "Resolve", "Reclassify", "Notes", "Auto Write Off", and "Reinstate AR". A "Close" button is at the bottom right.



Trade Promotions cont...

Deduction review and reconciliation

- Changes and splits deduction amounts among customers and change deduction codes on one screen
- Allows resolution, write-off, and matching of deductions to available accrued promotions
- Automatically write off small amounts
- Keep notes and maintain follow-up dates
- Reinstate unauthorized deductions as A/R debit memos

Multiple level credit checking

- Facility to establish multi-level hierarchy of customers contained within the ERP system, in addition to corporate holding companies external to the system
- Credit limit set and checked against any level
- Selective inclusion of outstanding deductions in credit checking

Integration

- Integrates with the following modules:
 - Accounts Receivable (Essential)
 - Inventory
 - Sales Orders (Essential)

