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PROMO MANAGEMENT

1. PROMO MANAGEMENT- VENDOR USER

Login as vendor user to able to access the Manage Promo screen with add new promos and edit the existing promos, Export Excel of promos based on it vendor login.

1.1 MANAGE PROMOS FOR VENDOR USER

Above is the view of Manage promo screen as Vendor.

User can able to view, Add and Edit the existing promos from manage promo screen.

Vendor user can see only the promos belonging to the vendors selected in user setup.

- User can sort each column by clicking on any of the column header labels and will display result in the orders by the data values in that column in ascending order, and clicking again will change the sort to descending order.
- "Not Submitted, Need more information, Submitted, approved, rejected " counts will be updated based on General column.
- Using "Add New Promo" button will be enabling and user can able to create Add new promo.
- Using "Edit" button Vendor can edit the information to the created promos
- Export Excel – Exports all grid information to an Excel spreadsheet.
- Pie chart - Status count per promo status should be displayed at initial load, Status count should get updated based on any status changes in the promos

Different statuses for promos are:

1. Not Submitted – Vendor has made changes to the promo but has not submitted to the Buyer.
2. Submitted – Vendor has submitted the promo to the Buyer/Business manager for review.
3. Approved – Buyer has approved the promo
4. Rejected – Buyer has rejected the promo. Vendor edits the previously approved rejected promo it will revert the previous status.
5. Need More Info –Buyer user has reviewed the promos and needs more information from vendor to make approve/reject decision or it's a converted promo.
6. Approve Error– Buyer has attempted to approve a promo, but there has been system error during approve process.
7. Discard Changes– Vendor can able to discard the changes of the promos which is in previously approve or non approved.
  - If the promo is previously approved it get reverted to previous approved status.
  - If the promo is non approved it get deleted.
8. Terminate – Vendor and Buyer can terminate the approved promos based on their authority.

## 1.2 ADD NEW PROMOS

User can able to create the promo by clicking the add button.

Add promo screen will be displayed allowing the user to create new promo

- The vendor drop down should display only the vendors associated with the current user.
- AR- Vendor - the selected vendor is associated with MH link then the field should loaded the AR vendors.
- Vendors drop down displays based on the vendor type(network levels of site and zone),
  - Multi-vendor user - Enabled, drop-down of active vendors -Disable field after vendor selection.
  - Single-vendor user - Disabled, auto-selection of vendor.
- Promo ID- Set as default as 'New'.
- Promo type should be set based on promo config of unconditional, rebate promos.
- Promo start date – set based on the lead days on parameter and end date should be selected by user based on lead days.
- Once the header details are filled (promo type selected)then only the detail grid and search/Delete option will display.

## 1.3 EDIT PROMOS

User can edit the promo with their header and item details change or simply view the all details .Promos change the status based on their authority.

User can able to Edit promos by clicking Edit button in manage UI grid and edit the promo, add update changes.

- Promo vendor will be loaded and the field will be read only.
- Vendor, and Promo type, Promo ID will be in disable
- Other fields can able to edit by the user.
- Save option should update status NS, submit option should update status SB.
- “Submit” button is enabled only when the promo is in ‘NS’ and ‘NI’ status.
- “Discard Changes” button is enabled when the status is in NS and NI and previously
- Edit the previously approved promo to click “Discard changes” it will revert to the previous status in vendor.

## 2. PROMO MANAGEMENT- BUYER USER

Login as buyer user to able to access the Manage Promo screen with Search and edit the promos based on the associated promo items business manager.

### 2.1 MANAGE PROMOS FOR BUYER USER

Above is the view of Manage promo screen as Buyer.

User can able to view, search and Edit the existing promos from manage promo screen.

Vendor user can see only the promos belonging to the vendors/buyers selected in user setup.

- Buyer can hide/unhide extra columns as per the need
- User can search required info by giving single(normal search) or combination(advanced search) of different search criteria like
  - Status [drop-down]
  - Item# [text entry]
  - Vendor# [text entry]
  - Vendor [text entry]
  - Site [text entry]

### 2.2 EDIT PROMOS

User can edit the promo with their header and item details change or simply view the all details .Promos change the status based on their authority.

User can able to Edit promos by clicking Edit button in manage UI grid and edit the promo to Approve, Need more information and reject.

Vendor Terminate promo that is in SB status with “Red” in color – Buyer will approve it by terminate the promos. Status will be in ‘AP’.