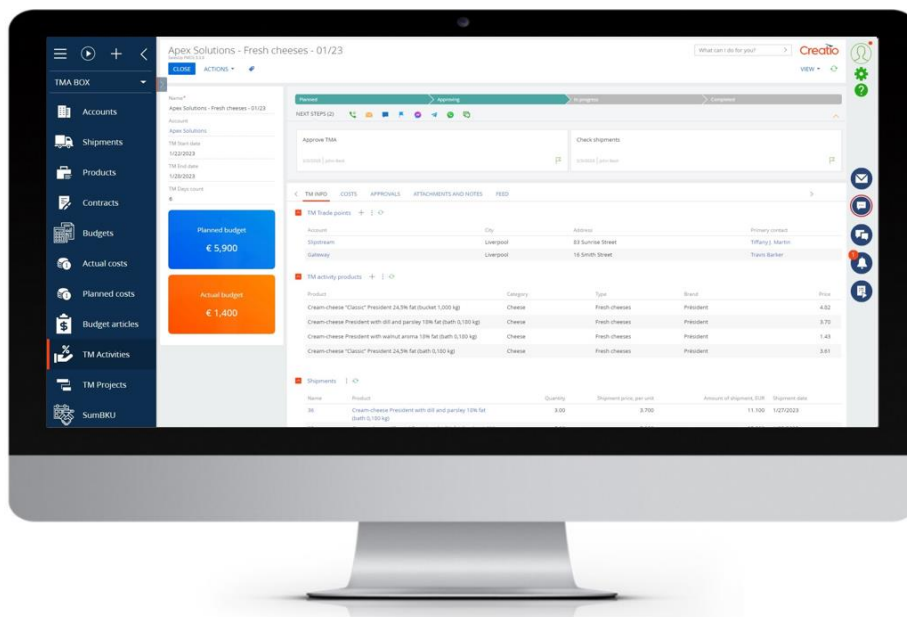




# FMCG MANAGEMENT FOR CREATIO



Guide to setup and utilization

29.01.2023

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## Product description

«FMCG Management» product — is a solution, which helps improving the efficacy of products and marketing activities management; controlling the performance of budgets utilization with the planning process automatization, specifically trade-marketing activities and tools for analytics in the business units, networks and distributors contexts.

## Use cases

«FMCG Management» product — is a tool that helps to efficiently manage financial and quantitative indicators of an enterprise on different levels. In the system context it is not possible to work with numerical data of any Creatio object.

For example:

1. Managing trade-marketing activities;
2. Managing activities;
3. Maintaining shipments records;
4. Control of the efficacy of budget utilization;
5. Indicators analytics in the business units, networks and distributors context.

Core strengths:

1. Full control over processes and complex tasks solution of trade-marketing department on all working levels: from managing global companies to controlling costs articles and shipments through points.
2. Managing the interaction with trade networks and distributors based on contract conditions along with work models under long-term and short-term planning sales; maintaining trade-marketing activities history with detailing of a specific trade point.
3. Reduce the duration of planning and reporting with a tool, which creates and helps analyzing trade-marketing activities budget on all levels of detailing.
4. Speed up of main routine tasks of managers, and minimizing of errors caused by the human factor thanks to the one window for managing discounts and trade-marketing activities.
5. Useful tool for visualization of trade-marketing department activities with interactive functions.

## Key features

1. Product allows to configure connections with accounts:
  - a. Extension of data for distributor categorization;
  - b. Trade-marketing activities history connected to an account;
  - c. Managing contract conditions: discounts and bonuses tracking, managing current prices and periods specified by contract conditions.
2. Possibility to manage budgets:
  - a. Accumulating planned and actual costs in one budget;
  - b. Possibility to relocate budget between sources of income;
  - c. Automatically saves previous budget versions;
  - d. Calculates different currencies;
  - e. Budget segmentation based on any required characteristics.

3. Convenient mechanism of promo-activities management:
  - a. Organization of operational planning by automatic fulfillment of fields with a built-in tool for managing historical data;
  - b. Managing key efficacy indicators such as ROI without manual recount by built-in logic evaluation of promo effectiveness;
  - c. Keeping records of cost items and shipments while planning;
  - d. Managing contracts' price conditions while planning activities with a specific trade network;
  - e. Reduce the approval time of activities with the help of a built-in sighting tool for both internal and external approval.
4. User-friendly visualization of a marketing calendar:
  - a. Marketing activities (annual) calendar visualization with an opportunity to change its size depending on quarter, month and week;
  - b. Managing the display of information on activities in the horizontal registry by retrieving corresponding columns;
  - c. Opportunity to go into details of an activity by clicking on the calendar element;
  - d. Possibility to drag activity and companies with an aim to change its start and end date.

## Remarks and limitations

- Standard step in budget and cost planning is only a month;
- Sales plan under a budget has to be solely in months;
- Using system of the Creatio Sales line, which includes the Contracts section.

«FMCG Management» module is compatible with all products on the Creatio Sales platform, versions of which are 7.14 and higher.

## «FMCG Management» product setup

To install packages go to the «System designer» and choose the «Application hub».

On the «Application hub» page click on the «Choose from Marketplace», enter the stand address and press the «Install» button.

If a package is installed from a file, it is necessary to request an up-to-date package from a Sales'Up customer support. Then, on the «Application hub» page click on the «Install from file», indicate a path to the archive and perform the installation.

## Presetting and «FMCG Management» module utilization

### Adding, editing and deleting products in the «Products» section

«Products» section is necessary to keep records of company products, their prices, balances, characteristics, etc.

On the product's record page fill in all the required fields and product characteristics.

1. Using «Prices» detail

«Prices» detail is useful for analysis and control of product's price changes over time. The detail saves the history of all price changes.

2. «Baseline» detail

«Baseline» detail demonstrates the number of products sold excluding sales of promotional goods in retail outlets.

## Adding new trade network

Go to the «Accounts» section and from the drop down window select the «New trade network» option (similar to that, it is possible to add accounts with «Legal entity», «Outlet» types, etc.).

### «MML» and «MSL» details of the «MML & MSL» tab

«MML & MSL» tab is necessary to fill in the assortment for previously created account.

#### 1. MML (Minimum Must List) detail

This detail contains information on active assortment of an account. This is a list of products, which must be in retail outlets.

#### 2. MSL (Minimum Sale List) detail

This detail contains information about mandatory assortment for a retail outlet. It is filled in based on retail outlet connections with a network from top to down. The detail is filled in automatically depending on category of a product.

Account	Product
Aushan	Fruit puree "Mix"
Aushan	Fruit puree "Apple"
Aushan	Fruit puree "Banana"

Shopnet Format	Product	Priority
Supermarket	Fruit puree "Mix"	1
Supermarket	Fruit puree "Banana"	0

It is possible to set up the MSL directory in the system designer, specifically «Priorities for MSL». The directory helps to set up priorities of products for the chosen category.


MSL directory has an informative aim and can be used for products' priorities analysis for a user.

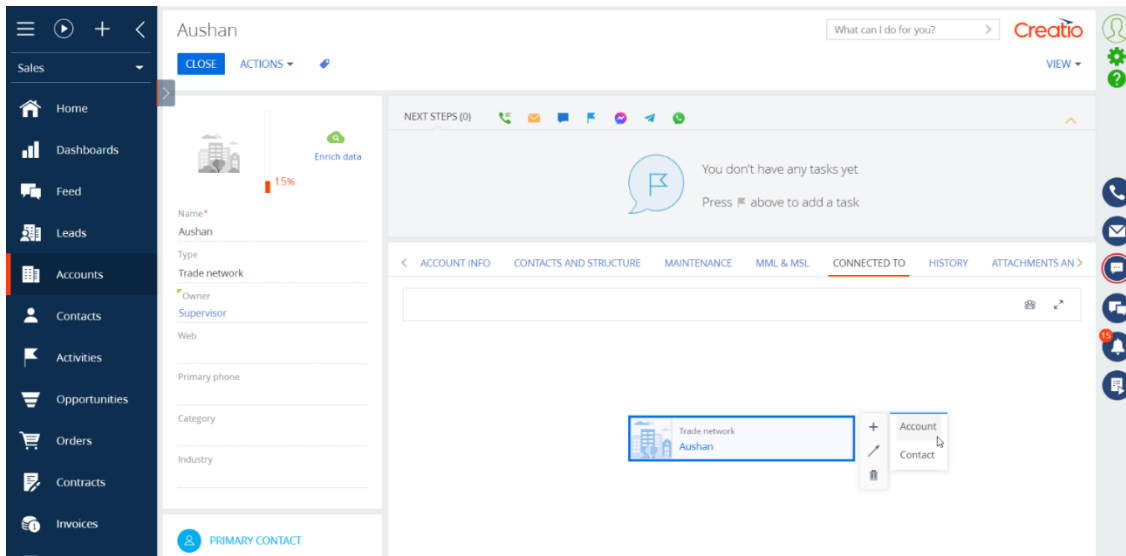
Shopnet Format	Product	Priority
Gipermarket	Fruit puree "Apple"	1
Gipermarket	Fruit puree "Mix"	0
Supermarket	Fruit puree "Mix"	1
Supermarket	Fruit puree "Banana"	0

## Connections setup

Connections – is a list of connections of an account, for instance, legal entity, retail outlets, trade networks. It is used to create Contracts and TM Activities.

To configure a connection for an account, follow next steps:

1. Go to the previously created Trade network;
2. Highlight a block on the «Connections» tab. Add a block by clicking on the .



In the opened window select the «Account» option

3. In the opened tab, fill in required and additional fields.
4. The inverse connection is set automatically.

## «Budget articles» section configuration

«Budget articles» section is necessary to create an article, based on which the budget is formed.


### Creating Budget article

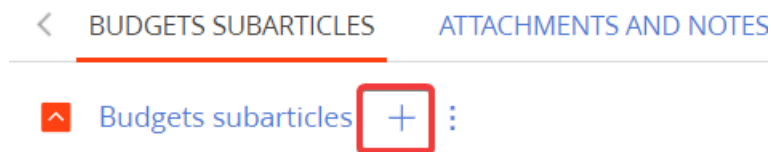
To create a budget article: Go to «Budget articles» section; Click on the «New»; In the opened window fill in fields and additional features; Press «Save» to save the object.

### Creating Budget subarticle

«Budget Sub article» detail is necessary to create sub articles, which refine previously created article.

To create a sub article:

1. Click on the  button on the «Budget Sub article» detail:



2. In the opened window fill in required fields.

3. Press the «Save» button to save the object.

## «Contracts» section configuration

The «Contracts» section is necessary to create the following contracts with clients: agreed commercial terms, product prices, budget conditions (keeping retro rates), logistics, etc.

### Creating Contract

Contracts are created in a standard way in the «Contracts» section. On the record's page fill in required fields.

1. Filling in the «Budget condition» detail

Budget condition – is a set of conditions, based on which a budget is formed.

2. Filling in the «Commercial terms» detail

Commercial terms affect the price formation of assortment under the contract.

- Commercial terms levels setup

There is an opportunity to setup priorities on commercial terms, according to which it is possible to determine which condition is taken over the given product.

3. «Commercial term levels» detail

Levels of active commercial terms are selected by priorities. Commercial terms level of the 0 value has the highest priority.

4. «Groups of commercial term levels» detail

It is a merge of two and more commercial term levels into one group. In this case the discount also combines.

5. Filling in the «Assortment» detail

Assortment is a list of products, which are agreed according to a contract with client.

Aushan 2023

What can I do for you? > Creatio

CLOSE ACTIONS

VIEW

Number	Aushan 2023	Owner	Supervisor
Type	Contract	Status	Signed
Parent contract		Start date	01.01.2023
Trade network	Aushan	End date	31.12.2023
Legal entity		Periods type	Month
Multiple subjects	<input type="checkbox"/>	Define regular price from price history	<input type="checkbox"/>

< GENERAL INFORMATION CONTRACT DETAILS HISTORY APPROVALS ATTACHMENTS AND NOTES FEED >

Budget conditions	+	:	
Name	Contract	Article	Budget subarticle
	Aushan 2023	Pos materials	Shelf design

Amount	+	:	
Amount, tern.	10,000.00		

Commercial terms	+	:	
Contract	Product	Brand	Product category
Aushan 2023	Fruit puree "Apple"		Products

## «Planning» section configuration

There is a possibility to purchase the «Planning» module in addition to the «FMCG Management». It can be done through Marketplace Terrasoft.

This module is necessary to get sales plan, which influences a budget forming. To start working with the Planning section, it is required to fill in levels, on which budgets are formed, in particular Product, Retail outlets or Trade network.

## «Planned costs» section configuration

«Planned costs» section is necessary to form and keep a record of planned costs. It depends on planned sales and discounts, and is mostly formed manually.

To create planned costs:

1. Go to the «Planned costs» section
2. Press the «New» button
3. In the opened window fill in required fields and additional characteristics

4. Press «Save» to save the object. Some of the fields will be filled after saving, and the cost curve of period specified in a chosen budget will be created. This curve allows distributing funds within fields of the «Sum of costs, plan». It is possible to exceed the remainder in case it is specified in the sub article.

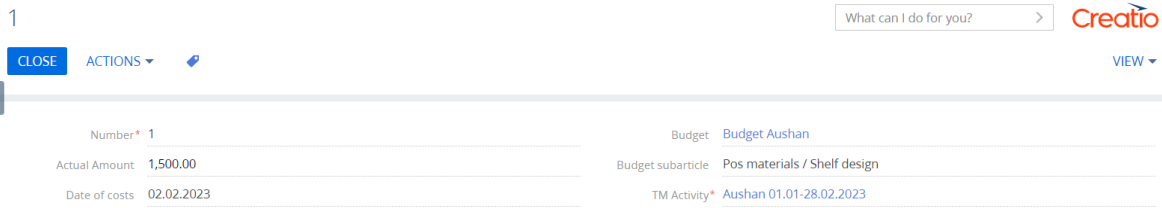
Example on how to fill in fields:

January 2023		February 2023	
Costs sum, plan	Remainder	Costs sum, plan	Remainder
0.00	1,000.00	0.00	1,000.00

## «Actual costs» section configuration

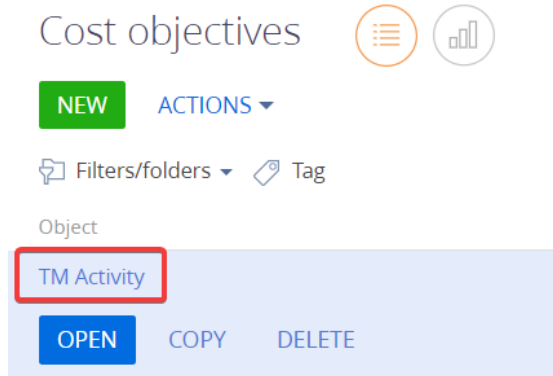
1. «Actual costs» section is necessary to keep a record of actual costs. This type of costs is expected to be formed in the accounting system. To add and actual cost: Go to the «Actual costs» section; Press the «New» button; In the opened window fill in required fields and additional characteristics.



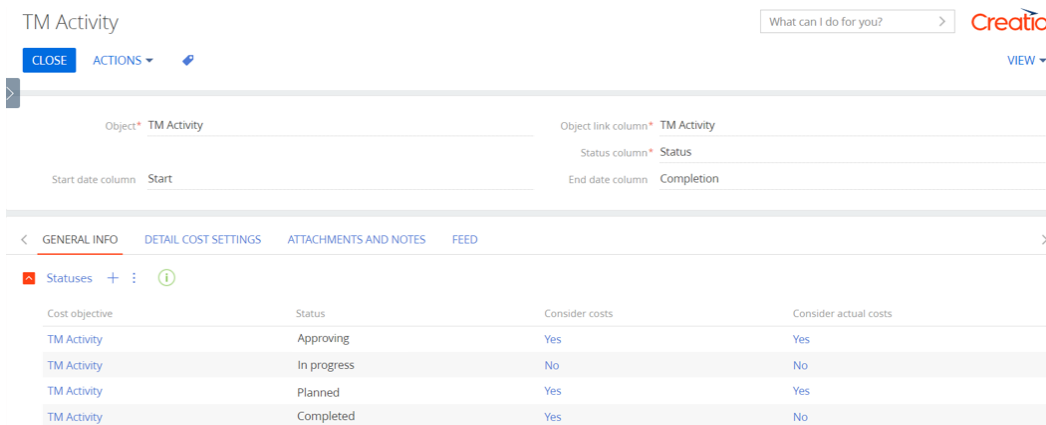


## Cost objectives settings

1. In the System designer, go to the «System setup» section and click on the «Cost objectives settings»;
2. In the cost objectives setting select the «TM Activities»;



3. It is possible to edit and add new information on an object on the opened page.





4. «General info» tab, «Statuses» detail


Statuses of cost objects (planned costs are displayed for current and future periods by default, for previous periods – actual costs).

5. «Costs set up» tab:

- Detail's object – a detail, where the cost calculations occur;
- Detail's object connection column – an object, from which data is collected in order to form costs;
- Plan costs object – an object, for which planned costs are formed;
- Actual costs object – an object, for which actual costs are formed;
- Name of the costs column of the reference to the detail object – a column, based on which costs are formed;

- Reference to budget subarticle – a budget sub article column, based on which costs are formed;
- Planned cost generation action – includes generation of planned costs;
- Actual cost generation action – includes generation of actual costs;
- Async costs generate actions – if it is excluded, then the cost generation happens immediately; otherwise, the cost generation happens in the background and sends a notification after the end of generation;
- Not create costs with zero – a logic field, where costs with zero value are not formed if the check box is ticked.

TM Activity What can I do for you?  

CLOSE ACTIONS ▾  VIEW ▾

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Object\* TM Activity Object link column\* TM Activity

Status column\* Status

Start date column Start End date column Completion

---

< GENERAL INFO DETAIL COST SETTINGS ATTACHMENTS AND NOTES FEED >

Object of the detail TM Activity Products	Name of the cost column of the reference to the detail object TM Activity
Object of detail planned costs Plan costs by products	Object of detail's actual costs Fact costs by products
Name of the cost column of the reference to detail object TM Activity Products	Link's column to budget subarticles TM Activity budget (by TM Activity column). Article/Subarticle
Planned cost generation action <input checked="" type="checkbox"/>	Actual cost generation action <input checked="" type="checkbox"/>
Async costs generate actions <input type="checkbox"/>	Not create costs with zero <input type="checkbox"/>

## «Budgets» section configuration

«Budgets» section is necessary to create a financial plan, which outlines indicators of organization's costs for a specific period.

### Creating Budget

To create a budget: Go to the «Budgets» section; Press the «New» button. In the drop-down list click on one of budget options: manual, automatic, discount.

### Adding Manual Budget

Manual budget – is a manual allocation of funds, costs goals, etc. It could be filled from the planning, if a module «Planning» is purchased.

1. On the record page fill in all required fields and additional information.

Budget Aushan What can I do for you? > **Creatio**

**CLOSE** ACTIONS **CALCULATE BUDGET** **ACTUALIZE** VIEW

Name\* Budget Aushan Type Manual

< BASIC INFORMATION COSTS PLANNING TM ACTIVITIES RELOCATION APPROVALS ATTACHMENTS AND NOTES FEED >

**General data**

Sum 2,000.00 Currency Hryvnia  
 Reserve 0.00 Start date\* 01.01.2023  
 Relocation 0.00 Due date\* 28.02.2023  
 Remainder 2,000.00 Periods type Month Archive

**Articles** + :

Name	Article	Sub-article	Sum
Pos materials / Shelf design	Pos materials	Shelf design	2,000.00

**Articles budget** [Menu]

January 2023				February 2023			
Amount	Reserve	Remainder	Relocation	Amount	Reserve	Remainder	Relocation
1,000.00	0.00	1,000.00	0.00	1,000.00	0.00	1,000.00	0.00

2. Filling in the «Articles» detail:

- a. To add an article, click on the + button on the «Articles» detail;
- b. In the opened window fill in all required fields:
  - c. Article – an article, based on which a budget is formed;
  - d. Subarticle – a sub article of a budget article. Sub articles are filtered depending on the selected article;

All other fields have informative purposes and are non-available for editing. The filling-in of these fields takes place on the «Budget articles» detail.

Aushan 01.02.-28.02.2023 What can I do for you? > **Creatio**

**CLOSE** ACTIONS **CALCULATE BUDGET** **ACTUALIZE** VIEW

< BASIC INFORMATION COSTS PLANNING TM ACTIVITIES RELOCATION APPROVALS ATTACHMENTS AND NOTES FEED >

**General data**

Sum 0.00 Currency Hryvnia  
 Reserve 0.00 Start date\* 01.02.2023  
 Relocation 0.00 Due date\* 28.02.2023  
 Remainder 0.00 Periods type Month Archive

**Budgets condition (View)** :

Root contract	Budget article	Sub budget article	Contract
Aushan 2023	Pos materials	Shelf design	Aushan 2023

**Articles** :

Name	Article	Sub-article	Sum
Pos materials / Shelf design	Pos materials	Shelf design	0.00

**Articles budget** [Menu]

February 2023			
Amount	Reserve	Remainder	Relocation

- e. Press the «Save» button to save an object. The system will open a previous page of budget editing.

3. Filling in a budget sum for articles:

- a. To add a sum for articles to a budget, choose an article to which the sum will be added;
4. Filling in the planning tab (optional step):
- Planning – linked planning;
  - Planning column, plan – a column, from which funds for planned values are deducted;
  - Planning column, fact – a column, from which funds for actual values are deducted;

## Adding Automatic Budget

Automatic budget is formed based on a contract with the network. It is used in the following way: «Which budget is allocated for work with the network». It is calculated based on budget conditions of a contract with the network, planned sales, object costs, and product prices.

1. On the record's page fill in all required fields:

The screenshot displays the 'Aushan 01.02.-28.02.2023' budget record page. At the top, there are buttons for 'CLOSE', 'ACTIONS', 'CALCULATE BUDGET', and 'ACTUALIZE'. Below these are fields for 'Name' (Aushan 01.02.-28.02.2023), 'Type' (Auto), 'Trade network' (Aushan), and 'Contract' (Aushan 2023). A navigation bar includes tabs for 'BASIC INFORMATION', 'COSTS', 'PLANNING', 'TM ACTIVITIES', 'RELOCATION', 'APPROVALS', 'ATTACHMENTS AND NOTES', and 'FEED'. The 'General data' section contains fields for 'Sum' (0.00), 'Reserve' (0.00), 'Relocation' (0.00), and 'Remainder' (0.00), along with 'Currency' (Hryvnia), 'Start date' (01.02.2023), 'Due date' (28.02.2023), and 'Periods type' (Month). The 'Budgets condition' section shows a table with columns: Root contract (Aushan 2023), Budget article (Pos materials), Sub budget article (Shelf design), and Contract (Aushan 2023). The 'Articles' section shows a table with columns: Name (Pos materials / Shelf design), Article (Pos materials), Sub-article (Shelf design), and Sum (0.00).

2. On the «Budget conditions» detail objects are automatically filled in from the selected budget.

After creating a new version of a contract, it is necessary to actualize a budget from the date conditions of a new contract are applied. New recommendation «Need to actualize» will appear at the top of a budget page.

This is a close-up of the 'Budget Aushan' header area. It shows the title 'Budget Aushan' and the version 'SalesUp.Budget 3.3.8'. Below the title are buttons for 'CLOSE', 'ACTIONS', 'CALCULATE BUDGET', and 'ACTUALIZE'. The 'ACTUALIZE' button is highlighted with a red rectangular box.

After the button «Actualize» is pressed, a pop-up window with a choice of date appears, from which a budget actualizes according to new contract conditions. A range of available months complies with start and end dates of a budget.

3. «Articles» detail is filled in automatically based on budget conditions.
4. «Budget articles» detail. Filling in cells in a table:

- Amount – non-editable cell, allocated funds from a budget for an article. It is calculated by the formula: Amount = Sales plan \* Condition, % \* Price;
- Reserve – non-editable cell, reserved funds for this article. It is calculated according to an object costs setting;
- Relocation – non-editable cell, allocated funds between articles and budgets. It is set up in the «Relocation» tab;
- Remainder – non-editable cell, a remainder of funds. It is calculated by the formula: Remainder = Amount - Reserve - Relocation.

Articles budget

January 2023				February 2023			
Amount	Reserve	Remainder	Relocation	Amount	Reserve	Remainder	Relocation
1,000.00	0.00	1,000.00	0.00	1,000.00	0.00	1,000.00	0.00

5. «Planning» tab.

«Planning» tab's fields are necessary to form a total turnover, which is filled from records of «Planning» tab.

6. «Budget planning connections» detail. Dynamic filtration folder of budget calculating from the planning setup:

- a. «Budget planning connections» detail allows connecting each budget level, which is required, to the planning level.

Choose a record in the detail setup compliance with the levels of a template. Example:

1. Assortment level – a product;
2. Point of sale level – an account.

When a record in the detail is selected, it is possible to assign a corresponding planning level.

Configuration of this detail affects the sales plan, which is counted for every article for a budget (creating conditions for a sales plan).

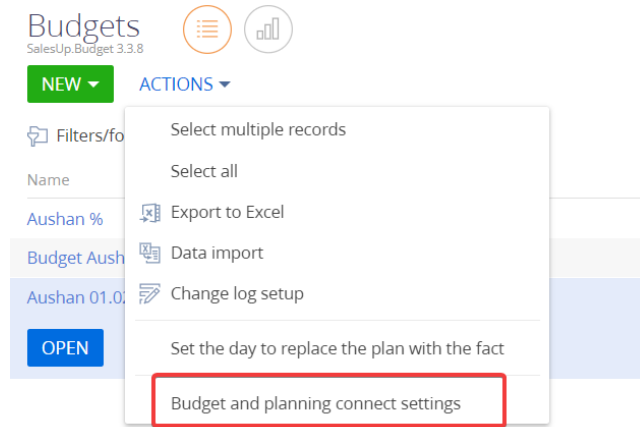
A budget article takes data on individual user filters from the planning when doing calculations/actualization.

All settings are optional; therefore, it is not necessary to specify any levels, if there is no need to filter planning data

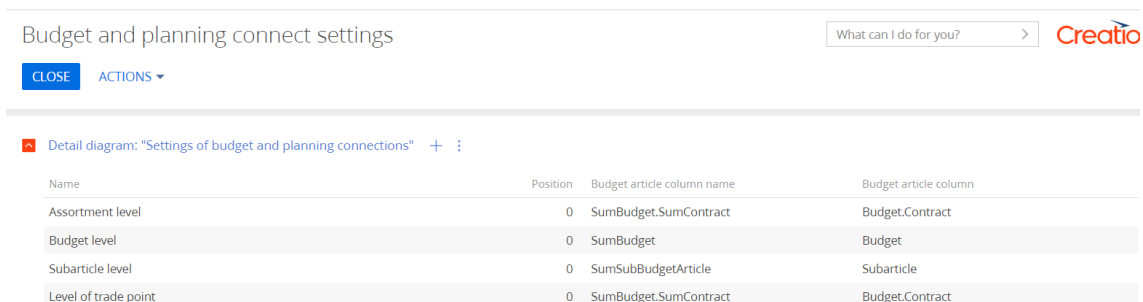
After fields are filled in, click on the «Calculate a budget» button.

7. Budget and planning connections settings

- a. Go to a budget section and select «Budget and planning connect settings» from Actions options.

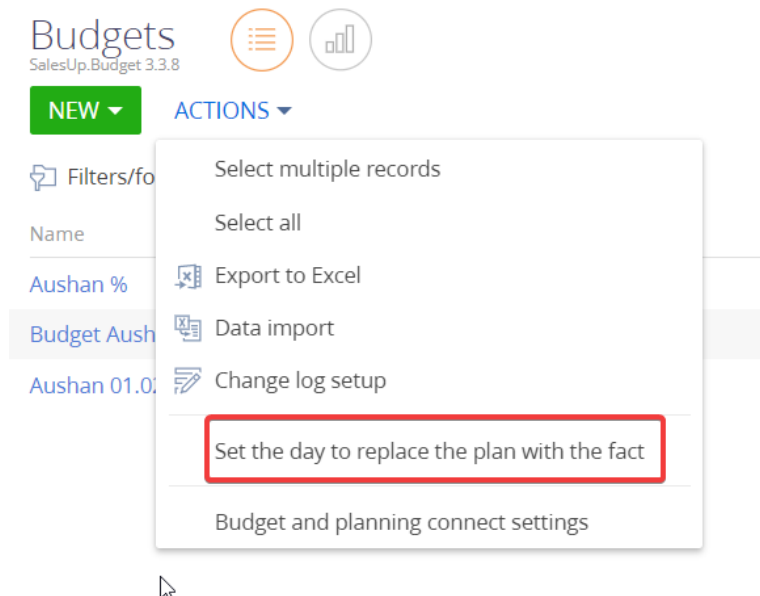


b. Specify templates of filters settings so that a planning level column corresponds to a budget article column.



8. Set the day to replace the plan with the fact

In order to set up a replacement of planned values with actual ones, go to the «Budgets» section and select «Set the day to replace the plan with the fact» option in Actions.



In the opened window choose a day, when a replacement of planned values with actual ones is performed. A replacement is done every set day of every month.

## Adding Discount Budget

Discount budget is automatically generated based on object costs. It is assumed that initially there is data, to where all these funds are allocated.

Aushan %  
SalesUp.Budget 3.3.8

What can I do for you? > Creatio

CLOSE ACTIONS CALCULATE BUDGET ACTUALIZE VIEW

Name\* Aushan % Type Discount

< BASIC INFORMATION COSTS TM ACTIVITIES RELOCATION APPROVALS ATTACHMENTS AND NOTES FEED >

General data

Sum 0.00 Currency Hryvnia  
Reserve 0.00 Start date\* 01.02.2023  
Relocation 0.00 Due date\* 28.02.2023  
Remainder 0.00 Periods type Month Archive

Articles + :

Name	Article	Sub-article	Sum
Pos materials / Shelf design	Pos materials	Shelf design	0.00

Articles budget

February 2023			
Amount	Reserve	Remainder	Relocation
0.00	0.00	0.00	0.00

1. Add articles, based on which discounts are formed.
2. In the «TM Activities» section create a TM Activity for discounts.

In the «Costs» tab for this TM Activity planned costs are required to fill in, which are connected to the budget discount.

3. After TM Activity with a planned cost is created, calculate the budget.

Aushan %  
SalesUp.Budget 3.3.8

CLOSE ACTIONS CALCULATE BUDGET ACTUALIZE

Name\* Aushan %

After this action, allocated funds to planned costs, specifically Reserve is relocated into Sum. Since a budget discount is formed in reverse, it is necessary to reserve funds, based on which a budget is formed.

## Funds relocation

Before using this tool, install limitations on relocation if it is necessary. In the system designer to the Disabling restrictions on the movement of relocation funds object and set it up:

System settings

NEW FOLDER ADD SETTING ACTIONS

- ★ Favorites
- All
  - Campaigns section settings
  - Emails section settings

Name Contains Relocation

Name	Code
Disabling restrictions on the movement of relocation funds	SumIsRelocationLimitOn

OPEN COPY DELETE

## Disabling restrictions on the movement of relocation funds

What can I do

CLOSE

Name\* Disabling restrictions on the movement of relocation funds

Type\* Boolean

Default value

Description

Code\* SumIsRelocationLimitOn

Cached

Save value for current user

Access for reading for internal users ⓘ

Allow for all

Restrict for all

Allow by operation

Access for modification for internal users ⓘ

Allow for all

Restrict for all

Allow by operation

Access for portal users


Allow reading for portal users

If the checkboxes are set as «allow», it means that limitations are turned off. If checkboxes are set as «forbidden», it means that limitations are turned on.

To add relocation:


1. Go to the «Relocation» tab and then click on the «+» button on the «Budgets» record's page;

Aushan %  
SalesUp.Budget 3.3.8

CLOSE ACTIONS  CALCULATE BUDGET ACTUALIZE

Name\* Aushan %

< BASIC INFORMATION COSTS TM ACTIVITIES RELOCATION

Relocation 

2. In the opened window fill in all required fields;



SAVE

CANCEL

ACTIONS ▾

VIEW ▾

Number	29	Type*	Redistribution of funds between months
State	In plans	Relocation sum	
Donor budget*	Aushan %	Recipient budget*	Aushan %
Donor budget article*	Pos materials / Shelf design	Recipient budget article*	Pos materials / Shelf design
Currency	Hryvnia		

< RELOCATION MONTHLY VISAS FEED >

Relocation monthly

3. After the «Relocation monthly» detail is saved, sums available for allocating will be displayed;

CLOSE

ACTIONS ▾

VIEW ▾

Number	29	Type*	Redistribution of funds between months
State	In plans	Relocation sum	0.0000
Donor budget*	Aushan %	Recipient budget*	Aushan %
Donor budget article*	Pos materials / Shelf design	Recipient budget article*	Pos materials / Shelf design
Currency	Hryvnia		

< RELOCATION MONTHLY VISAS FEED >

Relocation monthly

February 2023		
Relocation sum	Available	Currency
0.0000	0.00	Hryvnia

Note: in case the Approval for Creatio module is purchased, the «Status» field will automatically change to «Agreed» after the lead confirms. Sum of funds will be displayed in a budget of the selected article in both fields «Remainder» and «Relocation».

## «SumBKU» section configuration

«SumBKU» section – is a storage of contracts' conditions, necessary to keep records of additional contract's condition or TM Activity (storage of contracts' conditions, additional agreement tracked in the system).

## Creating BKU

To create BKU: Go to the «SumBKU» section; Press the «New» button; In the opened window fill in all required fields and additional characteristics.

5

What can I do for you? > Creatio

SAVE CANCEL ACTIONS ▾

VIEW ▾

Number*	Assignee	Supervisor	Trade network
5	Type		Outlet
	Legal entity		Trade network address
	Contract		TM Activity

< ATTACHMENTS AND NOTES >

Conditions

1. To save the object press the «Save» button;

## 2. Filling in the «Conditions» detail

To create a budget condition:

1. Press the « + » button on the «Budget conditions» detail;
2. In the opened window fill in required fields;
3. To save the object press the «Save» button.

## «TM Activities» section configuration

«TM Activity» is necessary to track the information about marketing events.

### Presetting «TM Activities» section

#### 1. «TM Activity» page setup

Initially, there are only a minimal number of fields on the TM Activity page. All other fields can be added through the «View» - «Open section wizard».

For two new fields - «Created on» and «Modified on» – a presetting should be created in the system designer. Section's presetting is configured by either a system administrator or responsible for the company's database.

In the system designer go to the «System settings» section.

In the drop-down list filters/folders, select the «Show folders» option.

Choose a «TMA fields» folder from the available list.

These folders are provided together with FMCG Management module. «TM Activity start date», «TM Activity end date» are main objects requiring to be filled in. In the system designer fill in the «Default value» field with a name of corresponding field from the database.

The screenshot shows the 'System settings' page. On the left is a sidebar with a list of folders, including 'TMA fields' which is highlighted with a red box. The main area displays a table of TMA fields with columns for 'Name' and 'Code'. Two rows are highlighted with red boxes: 'TM Activity start date' with code 'SumTMASStartDateField' and 'TM Activity end date' with code 'SumTMAEndDateField'. The 'Code' column contains codes for other fields like 'Regular price' (SumTMARegularPriceField), 'Promo price' (SumTMAPromoPriceField), 'TM Activity shipment start date' (SumTMAShipmentStartDateField), and 'TM Activity shipment end date' (SumTMAShipmentEndDateField).

Name	Code
Regular price	SumTMARegularPriceField
TM Activity start date	SumTMASStartDateField
Promo price	SumTMAPromoPriceField
TM Activity shipment start date	SumTMAShipmentStartDateField
TM Activity shipment end date	SumTMAShipmentEndDateField
TM Activity end date	SumTMAEndDateField

Example of customized settings: «TM Activity start date» by analogy of «TM Activity end date».

**CLOSE**

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Name\* TM Activity start date Code\* SumTMASStartDateField

Type\* Text (250 characters)

Default value CreatedOn Save value for current user

Cached

Description

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**Access for reading for internal users** ⓘ

Allow for all

Restrict for all

Allow by operation

**Access for modification for internal users** ⓘ

Allow for all

Restrict for all

Allow by operation

**Access for portal users**

Allow reading for portal users

## 2. Selection settings

In the system designer go to the «System settings» section and choose the «Selection settings» option.

In the selection setting, choose the «Selection into detail 'TM Activity products' in object 'TM Activity'» option.

Selection setting What can I do for you? > **Creatio**

**ADD** ACTIONS ▾ VIEW ▾

Filters/folders ▾ Tag

Name

Selection into detail "Product in Set" in object "Product"

Selection into detail "Sets" in object "Product"

Selection in the detail "TM Activity Products" in the "TM Activity" object

**OPEN** COPY DELETE

Selection into detail "Assortment" in object "Product"

### 1. «Main info» tab. «Other settings» detail

**Other settings**

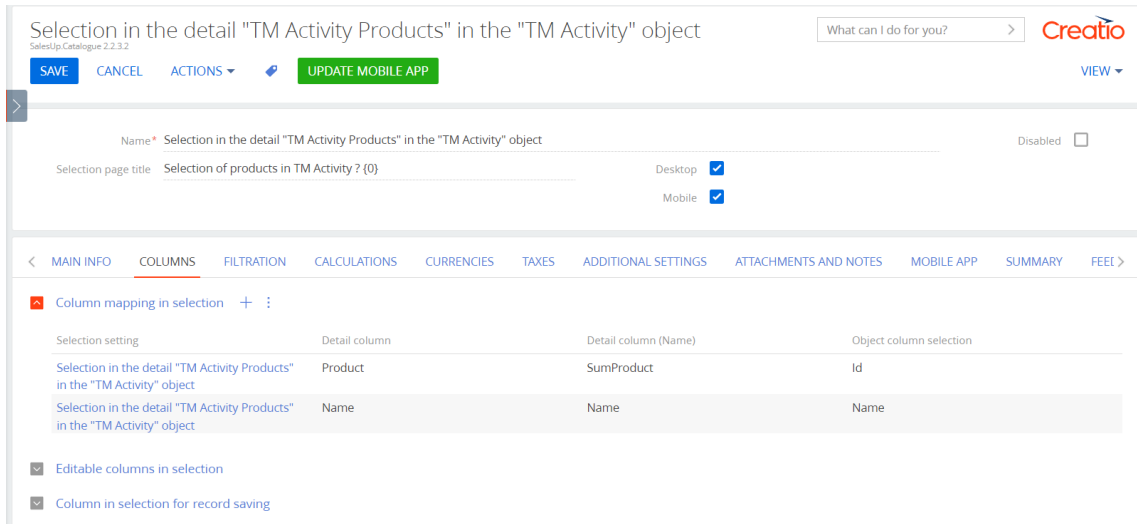
Show as hierarchy  Hierarchical selection object  Save only checked ✓  Identification code \_\_\_\_\_

Sort by other column  Sort column \_\_\_\_\_

Order direction \_\_\_\_\_

- a. Save only checked – a column to choose from will appear in rows of matched objects; only checked objects will be added into the detail, it is possible to make a multiple choice;
- b. Sort by other column – allows sorting matched objects by a selected column. It adds following fields:
  - Sort column – a field, by which all objects will be sorted;
  - Order direction – a choice of sorting «Ascending» or «Descending».

### 2. «Columns» tab



a. «Editable columns in selection» detail

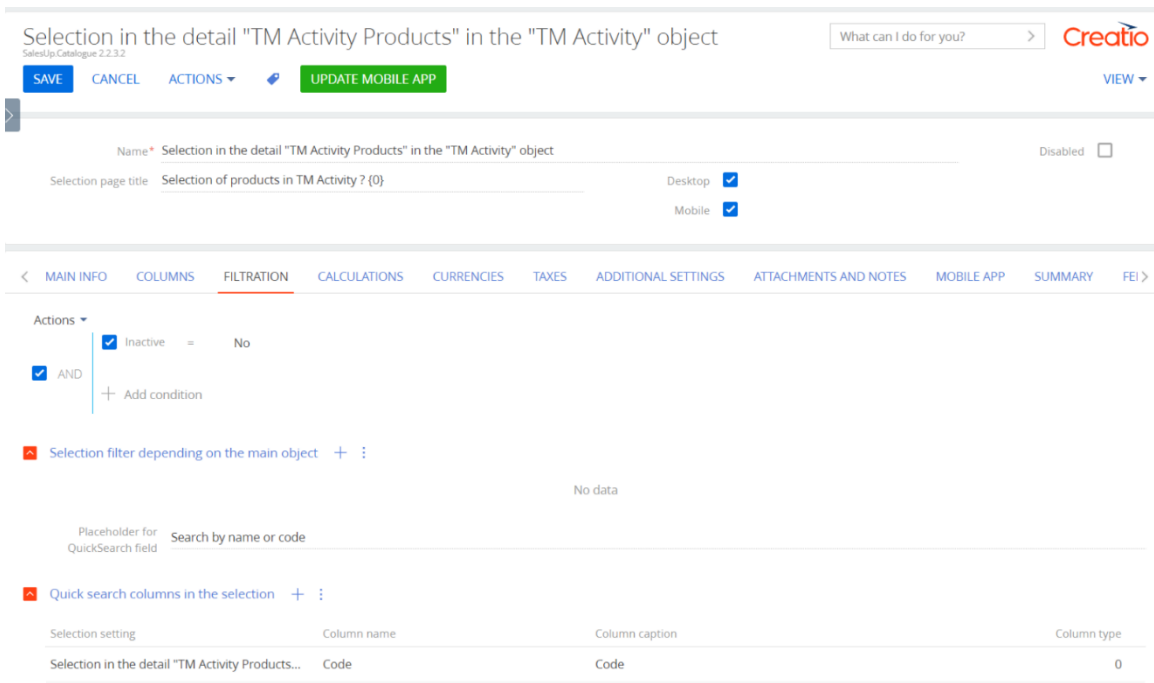
It is possible to specify which column will be available for editing. It also allows setting a limitation on the editable column (e.g. number should not exceed the remainder).

b. «Column in selection for record saving» detail (available only if the «Save only checked» is not selected in the «Other settings» detail)

It is possible to set by which column a record in detail will be saved. Saving occurs when this column is filled in or changed (e.g. column «Amount», where every time something is edited, a new object will be added from the detail).

3. «Filtration» tab

It makes filtration of a selecting object.



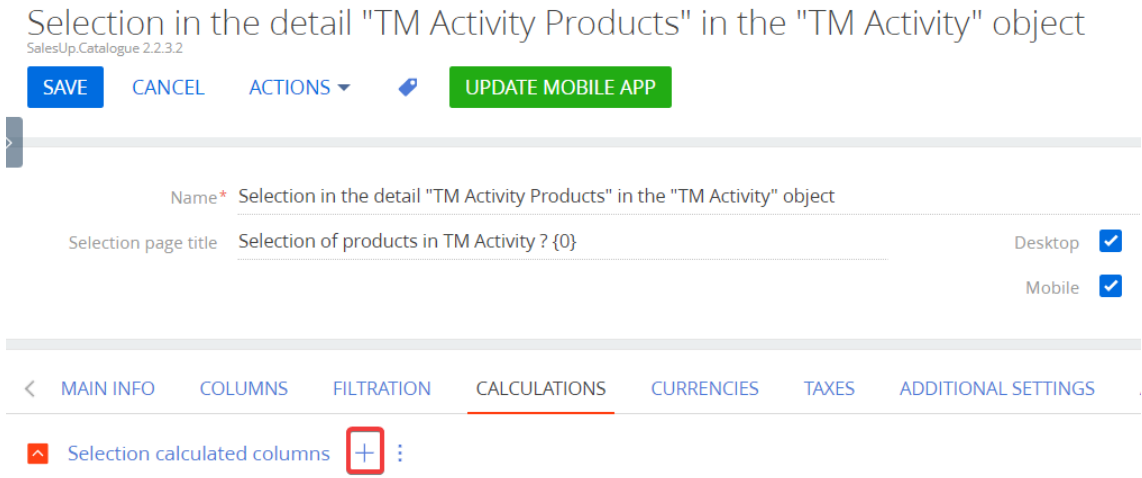
Placeholder for QuickSearch field – a name of a searching bar for a selected object depending on selected columns of quick search.

a. «Selection filter depending on the main object» detail – it allows configuring a filter, based on which selection columns and main object columns are compared;

- b. «Quick search columns in the selection» detail – choice of a column from selection object columns or connected objects for quick search configuration.

4. «Calculations» tab

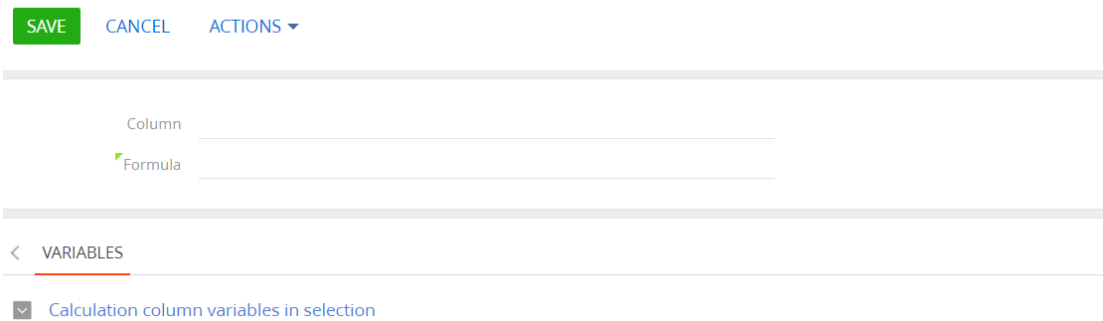
It allows configuring calculations in selecting columns.



a. «Selection calculated columns» detail

«Selection calculated columns» detail helps configuring calculations for a column. To set up this detail fill in required fields.

Selection in the detail "TM Activity Products" in the "TM Activity" object / Selecti...



b. «Calculation column variables in selection» detail

It allows merging values of variables with the ones from selected columns.

5. «Currencies» tab

It allows configuring which specific columns will be converted into the currency of a main object, in case of multicurrency values.

6. «Additional settings» tab

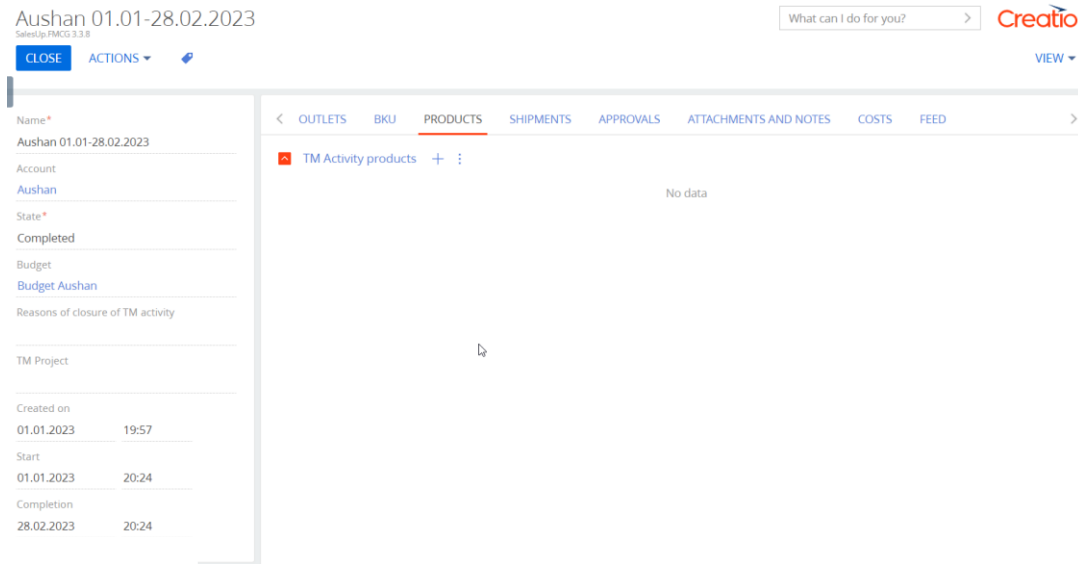
It contains following fields:

- Use «Add all» – it adds a Boolean field to the selection object, which allows adding all records available up to the current moment, which match the set filtration;
- Use «Replication» – it adds a Boolean field to the selection object, which allows replicating values previously added to the at least one or several columns to all records, which match the set filtration;
- Default «Add all» – sets the value by default to a Boolean field «Add all» in selection;

- Default «Replication» – sets the value by default to a Boolean field «Replication» in selection.

## Creating TM Activities

To create TM Activity: Go to the «TM Activities» section; Press the «New» button; On the editing page fill in required fields of an object.



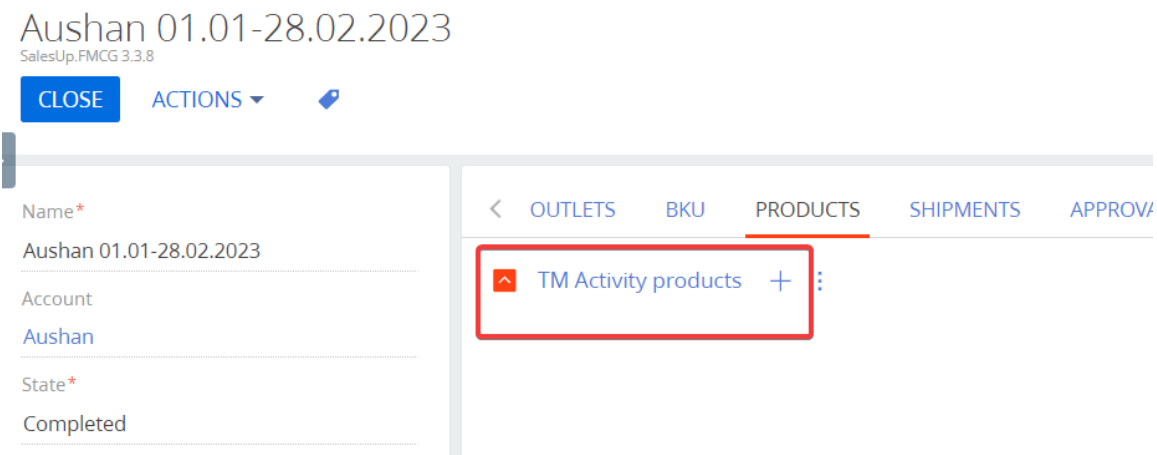
If a trade network in the «Network» field is selected, then «Outlets» detail is filled in automatically according to set connections.

1. To save a record press the «Save» button.

## Selection of products to the TM Activity

To add new products to TM Activity:

1. Click on the + on the «TM Activity product» detail in «Products» tab;
2. On the product selection page select columns based on which products will be chosen; these columns need to be added to the TM Activity. In addition, there is a possibility to setup a column for a selection object (in this case a column is displayed on detail and can be found in the selection object). Fields (example):
  - Products;
  - Price.



Ways to add products to the detail:

1. If in the selection settings «Save only checked» parameter is set, then a column «Select» will be displayed in that selection. This column provides an opportunity to specify which product needs to be added to a TM Activity.
  2. If in the selection settings a column «Column in selection for record saving» is added, then a product will be selected in case this column has been edited.
  3. If in the selection settings Если в настройках подбора был выбран параметр «Use «Add all»» parameter is set, then a relevant Boolean field will be displayed in selection. When selecting this field, there is a possibility to add either all products to the detail or only those, which are filtered (on the lower left part in the selection).
3. To add selected products press the «Save» button.

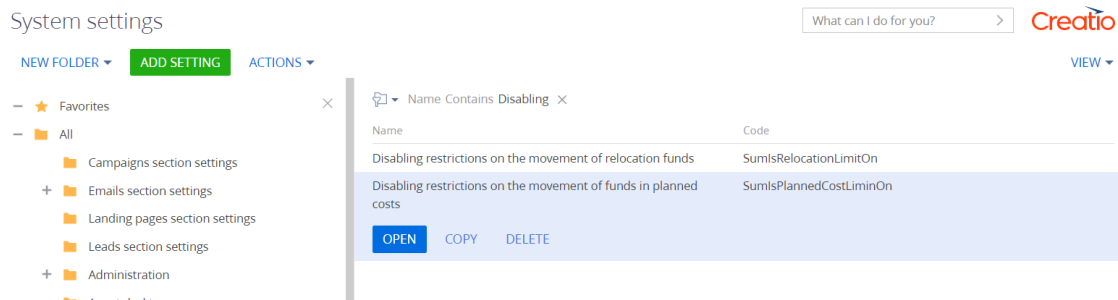
Filled in «TM Activity products» detail:

4. To edit data to the product, highlight it and click on the
  5. Fill in required fields and additional characteristics
1. To delete a product from the detail highlight the record and press the «Delete» button:

## Adding costs to the TM Activity

1. Removing limitations on relocation of funds in planned costs. Optional step.

In the system designer, go to the «Disabling limitations on funds relocation in planned costs» object and set it up:



If all ticks are set as 'allow', then a system controls the sum of remainder in general on article. Example: if in each month this sum is 200K, then the system controls the limitation on total amount in each month, specifically no more than 2,4M.

If all ticks are set as 'forbidden', then a system controls the sum of remainder within a month. Example: if in this month the sum is 200K, then the value of costs on this sum is a maximum of 200K.

Example of filling in:

**CLOSE**

Name\* Disabling restrictions on the movement of funds in planned costs

Type\* Boolean

Default value

Description

Code\* SumIsPlannedCostLimInOn

Cache

Save value for current user

**Access for reading for internal users** ⓘ

Allow for all

Restrict for all

Allow by operation

**Access for modification for internal users** ⓘ

Allow for all

Restrict for all

Allow by operation

**Access for portal users**

Allow reading for portal users

**2. Adding budgets**

Create an object on the «TM Activity budget» detail of Cost tab and fill in required fields:

Aushan 01.01-28.02.2023

What can I do for you? > **Creatio**

**CLOSE** ACTIONS **VIEW**

OUTLETS BKU PRODUCTS SHIPMENTS APPROVALS ATTACHMENTS AND NOTES **COSTS** FEED

Name\* Aushan 01.01-28.02.2023

Account Aushan

State\* Completed

Budget Budget Aushan

Reasons of closure of TM activity

TM Project

Created on 01.01.2023 19:57

Start 01.01.2023 20:24

Completion 28.02.2023 20:24

Planned costs

Costs

Actual costs

TM Budgets +

No data

**3. Adding planned costs.**

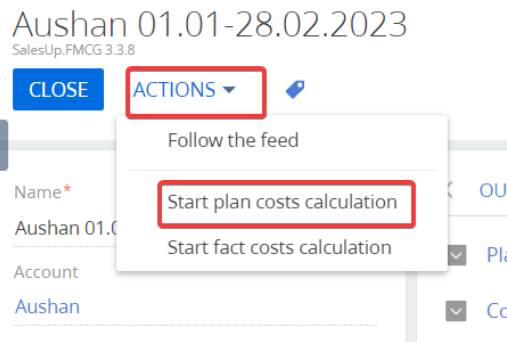
**1. Manual forming of planned costs. «Costs» tab.**

After a planned cost is added, it is possible to generate a table on the «Costs» detail by double clicking on it. This «Costs» table is formed as a table from the «Planned costs» section.

**2. Forming planned costs in the system**

It is also possible to form planned costs by system's actions according to selected products. On the TM Activity page choose the «Run a planned costs calculation» option after pressing the «Action» button. For this formation, it is required to fill in the «TM Activity products» detail in the «Main info» tab.





After this calculation is run, costs will be formed by each product («Planned costs by products» detail in the «TM Activity products» detail) for each month by every article specified in TM Activity's budget. After that the system adds this costs sum by articles as a planned cost in the «Planned costs» detail of the «Costs» tab.

Likewise, available remainder of funds is displayed on the «Costs» detail.

Note: For the proper calculations of planned costs (columns: «Sum» and «Remainder»), the «Planned costs by products» setting needs to be filled in and added to the CalcEngine.

After planned costs are filled in, the «Reserve» field will be automatically filled in for the selected month in a budget, based on which the TM Activity has been formed.

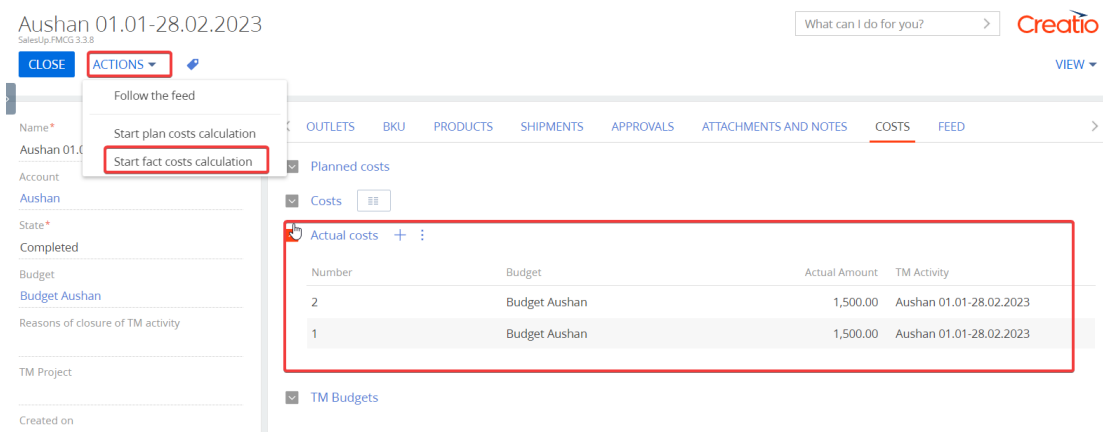
#### 4. Adding actual costs

##### 1. Manual forming of actual costs. «Costs» tab

After clicking on the + button, a record is added to the detail. Fill in following fields.

##### 2. Forming actual costs in the system

It is also possible to form actual costs by system's actions according to selected products. On the TM Activity page choose the «Run actual costs calculation» option after pressing the «Action» button. For this formation, it is required for the «Actual costs» detail to be filled in.



After this calculation is run, costs will be formed by each product («Actual costs by products» detail in the «TM Activity products» detail) for each month by every article specified in TM Activity's budget. After that the system adds this costs sum with months and budgets combination as an actual cost in the «Actual costs» detail of the «Costs» tab.

After the TM Activity is ended, it is necessary to change a TM Activity's status to the «Completed». When these steps are taken, planned costs are automatically replace with actual costs according to the object costs settings in the «Reserve» field of a current month's budget.

## Creating Shipments

«Shipments» section is useful for fixation of shipped goods by clients.

To create shipments: Go the «Shipments» section; Press the «New» button; In the opened window fill in required fields.

1. To save the object press the «Save» button.
2. Objects list will be displayed in the «Shipments» section's grid.

## **CONTACT US:**

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