

Promotion Fundings & Confirmations

Once FSSI generates an offer ID, an automatic funding request will be generated for you to submit your promotional funding. We can also manually generate funding request as you request. There are two parts to this process within the Funding and Confirmations application, Submitting Funding and Approving FSSI Reviewed Funding.

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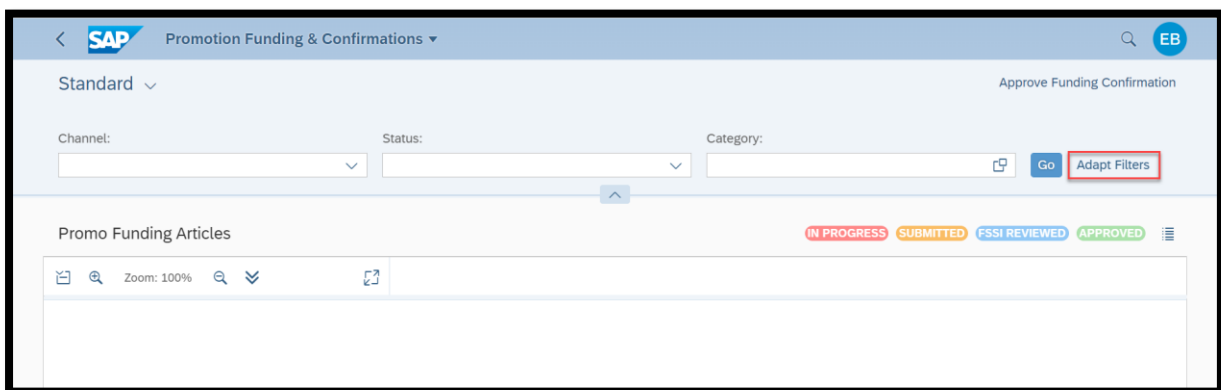
Please see below contents, to navigate to a certain position in the document please select.

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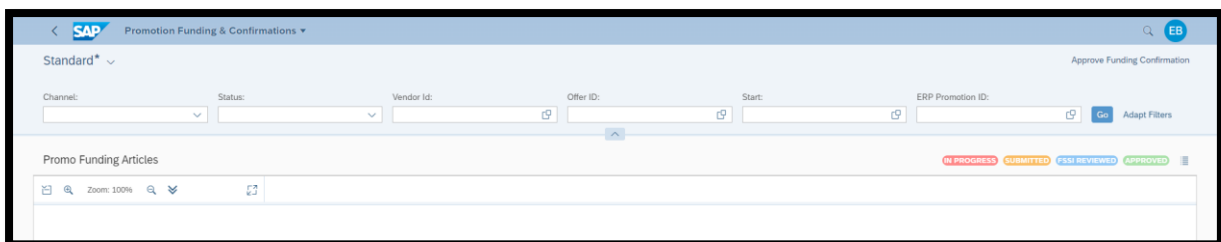
Promotion Fundings & Confirmations Navigation



- You will only have three filters available when first entering the application, “**Channel, Status & Category**”. Pressing ‘Go’ will show you all articles you have filtered for.
- Additional filters can be found under the ‘**Adapt Filters**’ button, this will help narrow down selection when looking for certain events



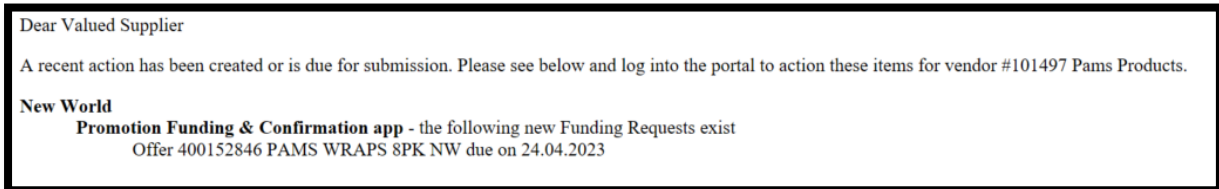
- For ease of navigation, we recommend using the below filters
 - **Channel**
 - **Status**
 - **Vendor – Only if you have more than one vendor number to manage.**
 - **Start**
 - **Offer ID**



(Please see our guide on filters on our [FSSI Exchange Page](#))

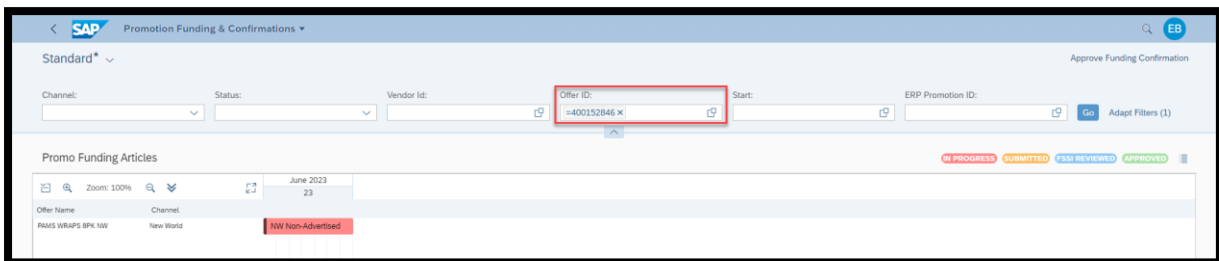
Funding Request Emails

When an Offer has been created by your Category Manager, PMR will send you a funding request overnight which you will be notified of via an email letting you know that you have a Funding Request waiting. These can include multiple different offers depending on how many products will be on upcoming promotions for each banner. Email example below,



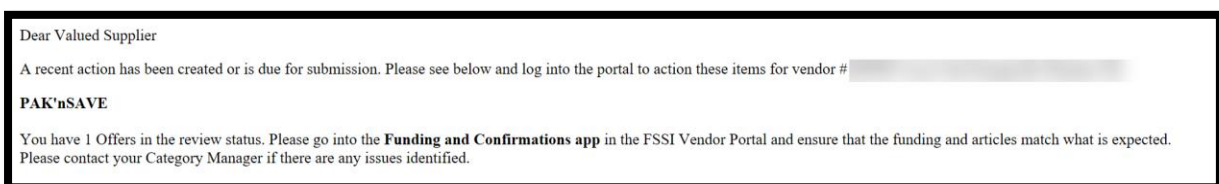
This email can be very helpful when using the '**Offer ID**' filter. Searching the offer ID in the funding and confirmations application will only show the block associated with the number.

- If you submit funding on the same day as it was the funding request was generated, you will still receive the email but have nothing to action.



The other email you will receive is when your Category Manager has reviewed the funding submission and sent back a confirmation for review. It is vital to note that there can (and often will) be changes from your original submission, so checking each block that comes back as 'FSSI Reviewed' is vital. Changes can be based on email dialog, cost changes, retail changes etc.

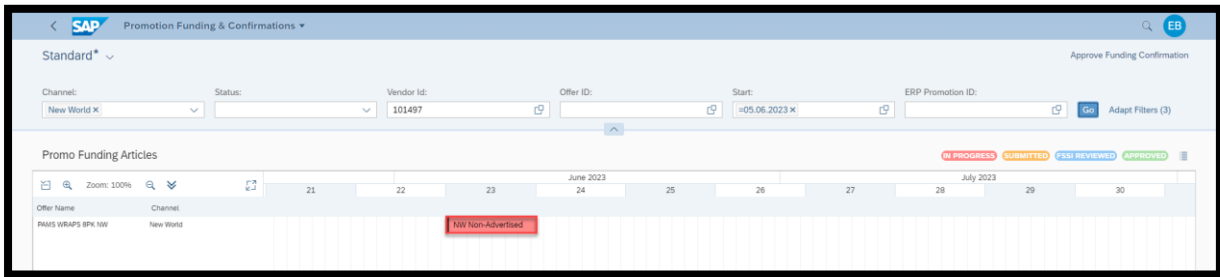
Much the same as the email notification letting you know about a funding request, there is also an email notification that will be sent to you to let you know that you now have offers in the review status:



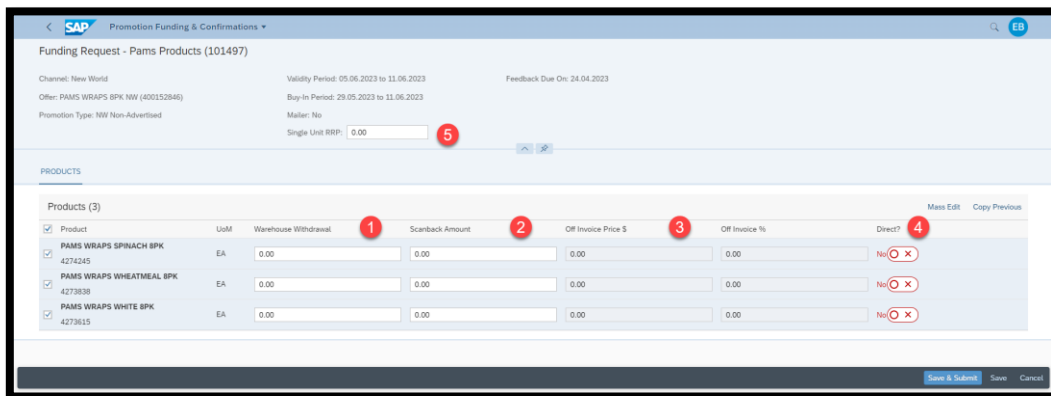
If you have any further questions relating to the Funding Emails, please let us know.

Adding Funding to a Funding Request

- Once you have found the event you wish to add funding for, click into the **'Red block'**



- This will open up the offer for funding to be completed
 - You have to enter funding for each article within the request



- Warehouse Withdrawal** - This is an amount per unit that is claimed from the supplier via a weekly settlement process. This layer of discount is for units purchased during the promotional period from the FSSI DC (warehouse) into the retail store. based on the number of units the store has received during the buy period.
- Scanback** - This is an amount per unit claimed from the supplier for units sold through the till during the period of the promotion. One caveat to this is that promotional items sold via online shopping can go through our system up to 6 days after the promotion has finished. We honor the promotion at the time of the customer checking out online. This can result in Scanbacks settling (generating an invoice) after the promotional period ends.
- Off invoice price (\$/%)** - This is the dollar value you will charge on your invoice to store. This is only for direct supplied products.
- Direct (?)** - This is asking if your product is supplied direct to store or purchased via our distribution centers. If it is a direct product, then make sure this is selected as yes. If it's available from the DC, then leave it as no. It is important to make sure that if there is a product in the list that is not available in the DC, but you select the article to be ranged from the DC you will run into errors. As a general rule, the funding request will default to whatever the current source of supply is for the banner that the offer is in.
- Single Unit RRP** - This is the 'Suggested Retail Price Per Unit' of the article/s during the promotional period. This is an optional field and is there for you to suggest a retail price. This field is not used in the confirmations side of PMR and is not a condition of the offer being accepted. Any specific questions around actual promotional retail should be addressed in dialog with your category manager.

Mass Editing

When you wish to edit all articles at once the process is the same as above to enter the block,

- Select the products you wish to edit.
 - Please note: Only select the products that are either Direct or Not Direct as you cannot edit both together
- Select the '**Mass Edit**' button

The screenshot shows the SAP 'Promotion Funding & Confirmations' interface for 'Funding Request - Pams Products (101497)'. The header includes details like 'Channel: New World', 'Validity Period: 05.06.2023 to 11.06.2023', and 'Feedback Due On: 24.04.2023'. Below this is a 'PRODUCTS' section with a table of three items: 'PAMS WRAPS SPINACH BPK', 'PAMS WRAPS WHEATMEAL BPK', and 'PAMS WRAPS WHITE BPK'. Each row has input fields for 'Warehouse Withdrawal', 'Scanback Amount', 'Off Invoice Price \$', and 'Off Invoice %', and a 'Direct?' dropdown menu. A 'Mass Edit' button is highlighted in a red box in the top right of the table area. At the bottom right, there are 'Save & Submit', 'Save', and 'Cancel' buttons.

- This will bring up the below pop-up for you to enter all sections for ALL articles selected ensuring you have the source of supply correct.
- Select the '**OK**' button to enter the details

This screenshot shows the same SAP interface as above, but with a 'Mass Edit' pop-up dialog box open in the center. The dialog box contains input fields for 'Warehouse Withdrawal', 'Scanback Amount', 'Off Invoice Price \$', and 'Off Invoice %', and a 'Direct?' dropdown menu. The 'Direct?' dropdown is currently set to 'No'. At the bottom of the dialog box are 'OK' and 'Cancel' buttons. The background table and buttons are dimmed.

- If you need to adjust any of sections and you wish to use Mass Edit, please note you will need to fill out all sections again, if you input only one it will wipe all other funding back to 0.00

Submitting

- Once you have input all of your funding for articles, click the **'Save & Submit'** button

The screenshot shows the SAP 'Promotion Funding & Confirmations' interface for a 'Funding Request - Pams Products (101497)'. The header includes details like 'Channel: New World', 'Validity Period: 05.06.2023 to 11.06.2023', and 'Feedback Due On: 24.04.2023'. Below this is a table of products with columns for Product, UoM, Warehouse Withdrawal, Scanback Amount, Off Invoice Price \$, Off Invoice %, and Direct?. Three products are listed: PAMS WRAPS SPINACH BPK, PAMS WRAPS WHEATMEAL BPK, and PAMS WRAPS WHITE BPK. At the bottom right, the 'Save & Submit' button is highlighted with a red box.

- There will be a confirmation of submission pop-up appear.
 - Click **'Submit'**

This screenshot shows the same SAP interface as the previous one, but with a confirmation dialog box overlaid in the center. The dialog has a yellow warning icon and the text: 'Warning: Do you want to Submit the Funding Request? Once submitted, it cannot be edited.' It has 'Submit' and 'Cancel' buttons. The 'Submit' button is highlighted with a red box.

- Once you have submitted funding, the block in the calendar will turn orange indicating that the Funding Request has been submitted.

The screenshot shows the SAP 'Promo Funding Articles' calendar view. The calendar spans from May 16 to June 26, 2023. A block for 'PAMS WRAPS BPK NW' is highlighted in orange, indicating it has been submitted. The interface includes search filters and a legend for funding statuses: IN PROGRESS, SUBMITTED, PMS REVIEWED, and APPROVED.

We **highly recommend** that before submitting your funding you check it more than once, you cannot edit the funding once submitted and will need to talk to your category manager to send you a new Funding Request to be completed

Copy Previous

For quick actioning of a Funding Request, you can use the 'Copy Previous' Button to automatically populate the funding with the same products previous promotional funding.

- Selecting the products, you wish and then the '**Copy Previous**' button will look at the products previous funding and copy those details into the fields required.

The screenshot displays the SAP 'Promotion Funding & Confirmations' interface. At the top, it shows 'Funding Request - Pams Products (101497)'. Below this, there are fields for 'Channel: New World', 'Validity Period: 05.06.2023 to 11.06.2023', 'Feedback Due On: 24.04.2023', 'Offer: PAMS WRAPS 8PK NW (400152846)', 'Buy-In Period: 29.05.2023 to 11.06.2023', 'Promotion Type: NW Non-Advertised', and 'Maller: No'. A 'Single Unit RRP' field is set to '4.98'. The main section is titled 'PRODUCTS' and contains a table with three rows of product data. Each row has a 'Copy Previous' button highlighted with a red box. At the bottom right, there are 'Save & Submit', 'Save', and 'Cancel' buttons.

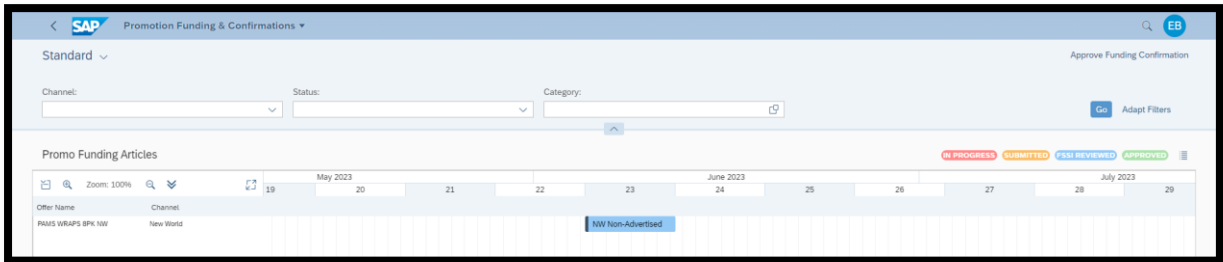
| Product | UoM | Warehouse Withdrawal | Scanback Amount | Off Invoice Price \$ | Off Invoice % | Direct? |
|---|-----|----------------------|-----------------|----------------------|---------------|----------|
| <input checked="" type="checkbox"/> PAMS WRAPS SPINACH 8PK 4274245 | EA | 0.00 | 0.00 | 0.00 | 0.00 | No (O X) |
| <input checked="" type="checkbox"/> PAMS WRAPS WHEATMEAL 8PK 4273838 | EA | 0.00 | 0.00 | 0.00 | 0.00 | No (O X) |
| <input checked="" type="checkbox"/> PAMS WRAPS WHITE 8PK 4273615 | EA | 0.00 | 0.00 | 0.00 | 0.00 | No (O X) |

Please Note: Although this may remove some manual work, we do recommend going through the copied funding and the source of supply on all articles (including deleted products), to check this matches your expectations before submitting.

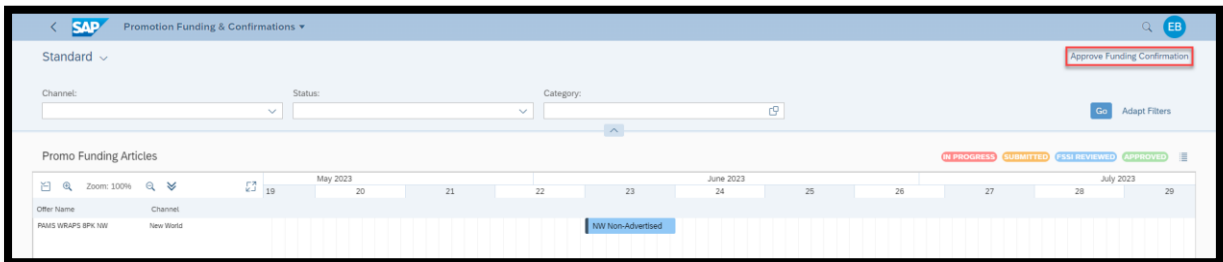
Approving Funding Requests

Once FSSI have reviewed the funding they will send it back to you for approval. You will have 7 days between FSSI Reviewing the offer and the offer being received by stores. Therefore, we highly recommend checking all FSSI Reviewed blocks ASAP and to contact your Category Manager with any questions you may have.

- Once the Funding request has been sent back it will be showing as blue/ **'FSSI Reviewed'** status.



- Please always double check the funding is as expected in all showing blue blocks,
- Once checked all blue blocks, select the **'Approve Funding Confirmation'** button,



- Another Pop-Up will appear telling you that Approving will approve all blocks in the FSSI Reviewed Status.
- Once **'Approved'** the block/s will turn green for the approved status,

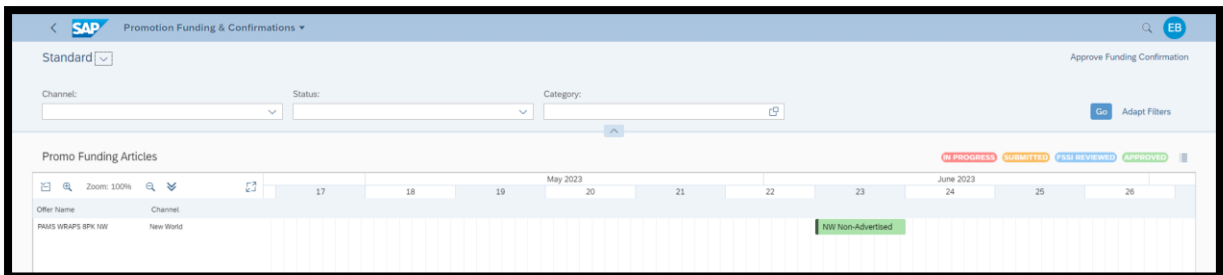
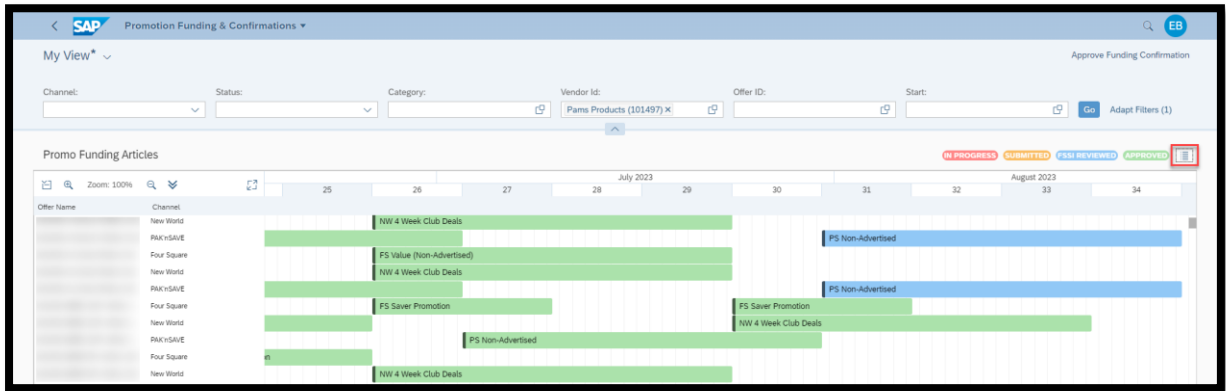


Table View

An alternative to having to click into each product block you can use the '**Table View**' which can allow you to view all Funding Requests in a table and use filters to see all promotions in the required status.

- The table view can be entered by clicking the icon identified below,



This will show as the below, and you can use the '**Cog**' icon to change filter view, change the order, add in new or take away unused filters until the view suit your purposes.

The screenshot shows the same SAP interface but with the 'Table View' selected. The table displays 13,658 funding articles. The columns include Vendor Id, Channel, Status, Offer ID, Ad. Levy, Off Invoice %, Off Invoice \$, Scanback \$, Single Unit RRP, Statistical / Warehouse Promo Cost, Request Vendor Name, Offer Name, and Promotion Type. A red box highlights a 'Cog' icon in the top right corner of the table area, used for adjusting filters and view settings.

| Vendor Id | Channel | Status | Offer ID | Ad. Levy | Off Invoice % | Off Invoice \$ | Scanback \$ | Single Unit RRP | Statistical / Warehouse Promo Cost | Request Vendor Name | Offer Name | Promotion Type |
|-----------|-------------|----------|----------|----------|---------------|----------------|-------------|-----------------|------------------------------------|---------------------|------------|----------------|
| 101497 | PAKnSAVE | Approved | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | Pams Products | | Z008 |
| 101497 | PAKnSAVE | Approved | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 11.22 | Pams Products | | Z008 |
| 101497 | PAKnSAVE | Approved | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 11.14 | Pams Products | | Z008 |
| 101497 | Four Square | Approved | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | Pams Products | | Z051 |
| 101497 | New World | Approved | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | Pams Products | | Z101 |
| 101497 | New World | Approved | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 5.36 | Pams Products | | Z101 |
| 101497 | PAKnSAVE | Approved | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | Pams Products | | Z011 |

The table view also has a filter for the '**Statistical/Warehouse Promo Cost**' (Cost to Store) for the Funding Requests in the table view that is not visible within the Calendar view.

This screenshot is identical to the previous one, but with a red box highlighting the 'Statistical / Warehouse Promo Cost' column in the table header, demonstrating the filter mentioned in the text.

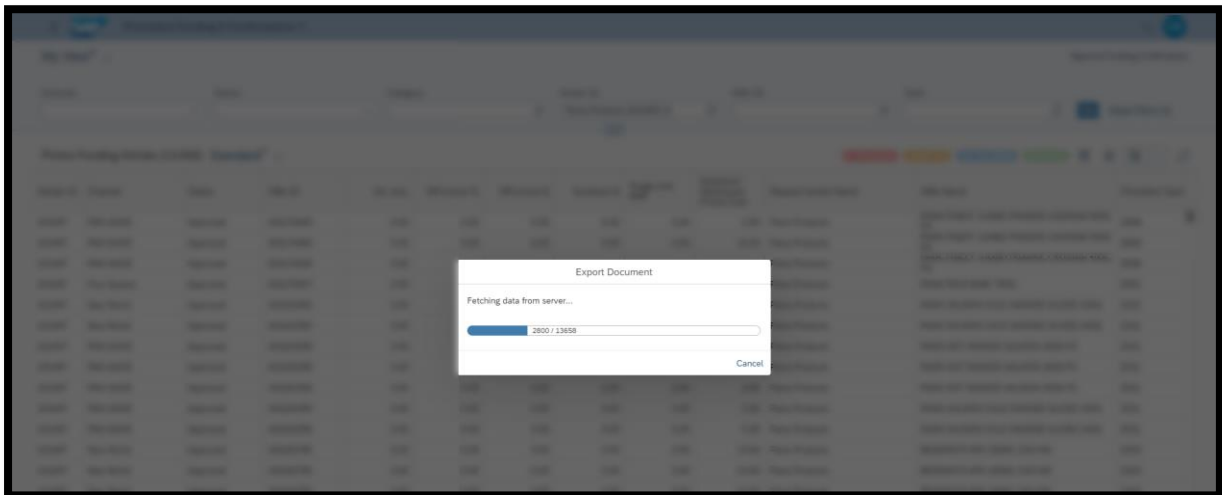
Exporting - Table View

This view also allows you to Export all funding requests into an excel file. (Functionality that cannot be done for the Calendar View)

- The export button icon can be found identified below,

The screenshot shows the SAP interface for 'Promotion Funding & Confirmations'. At the top, there are filter fields for Channel, Status (FSSI Reviewed X), Category, Vendor Id (Pams Products (101497) X), Offer ID, and Start. Below the filters is a table titled 'Promo Funding Articles (9) Standard*'. The table has columns for Vendor Id, Channel, Status, Offer ID, Ad. Levy, Off Invoice %, Off Invoice \$, Scanback \$, Single Unit RRP, Request Vendor Name, Offer Name, Promotion Type, and Valid From. The 'Export' button icon (a document with a plus sign) is highlighted with a red box in the top right corner of the table area.

Depending on the size/amount of funding requests and the filters you have will determine how long all the data takes to export.



This will automatically open a downloaded export of the table view.

The screenshot shows an Excel spreadsheet with the following columns: Vendor Id, Channel, Status, Offer ID, Ad. Levy, Off Invoice %, Off Invoice \$, Scanback \$, Single Unit RRP, Statistical / Warehouse Promo Cost, Request Vendor Name, Offer Name, Promotion Type, Valid From, and Valid To. The data rows show various funding articles with details such as Vendor Id (101497), Channel (New World, PAKnSAVE, Four Square), Status (Approved), Offer ID, and various financial values.