

Filters

This guide explains how to utilize filters within the FSSI Promotional Portal Applications

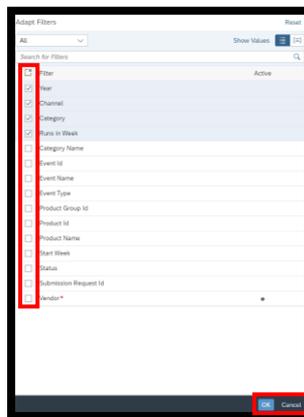
Filters are essential for using the Promotions Portal effectively. We will break down to each of your applications, what filters are most beneficial per application and where to gather external information to use within some of these filters

Adding Filter & Saving New Filter to your Filters as your Default View

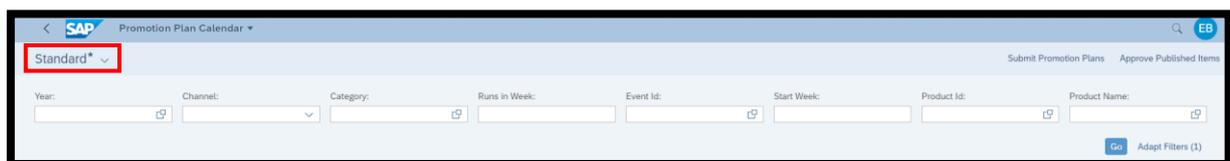
- When you first enter any application in the FSSI Promo Portal, your view will be set to '**Standard**'.



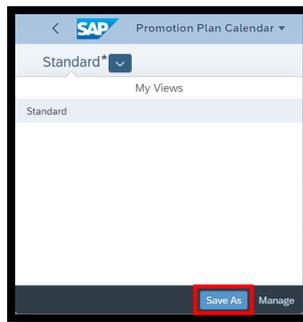
- This can be updated to include as many offered filters as you require and saved so whenever you enter an application all required or used filters are showing. Click into the '**Adapt Filters**' button
- This will bring up a list of ALL possible filters, select the ones you wish to add and click '**OK**' to add these to your current screen
 - Note: Clicking '**OK**' does **NOT** make this your new default setting
 - Note: Each application has different available filters



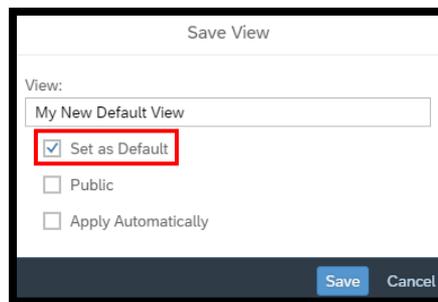
- Once returned to the main view screen you should see your additional filters added. If you wish to now save the current view your default view, click on the '**Standard***' button or the downwards '▼' icon



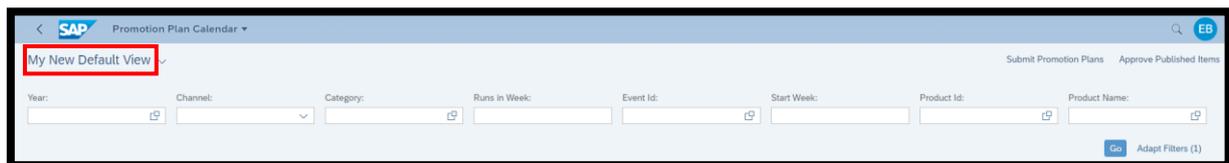
- A drop-down will appear click the '**Save As**' button



- You will then be able to Save the View.
 - The best practice for a new default is to change the name of your view. This can be anything you like such as your name or description of view.
- To make the view your new default which will automatically appear each time you enter the application, you **MUST** click the '**Set as Default**' button



- Click '**Save**'
- Your view will automatically change to the newly saved default view. Every time I now enter the '**Promotion Plan Calendar**', my view will always be '**My New Default View**'.



Another highly effective rule to note: If you save a new '**default view**' with any of the newly added filter's populated with data e.g., the '**Year**' filter says 2023, when you save this the 2023 will be automatically populated when you next enter the application. This will save you time from entering reoccurring data each time.

You can create as many different views as you wish for filters for different tasks you may have. We would highly recommend when first entering the FSSI Promo Portal as a new user to create your own default view as this could help solve any issues you come across in any of the three following applications.

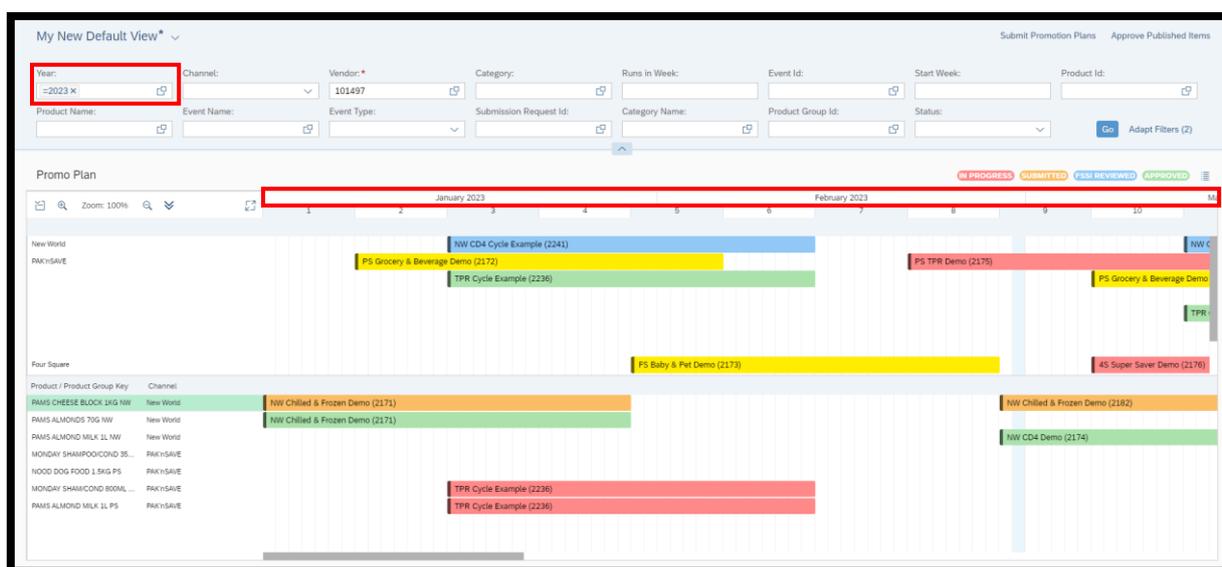
Three Applications Filter Guide

The following pages will cover the most beneficial filters we heavily recommend using in the different applications as they can be very useful to help find specific tasks, events, offers etc.

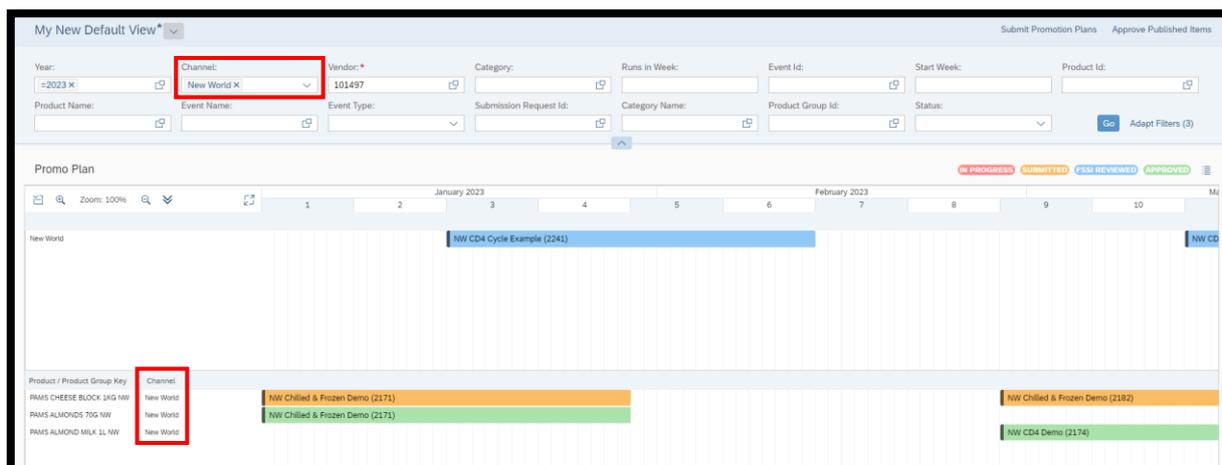
Promotion Plan Calendar

The *Promotion Plan Calendar* application is used heavily as part of the planning stage for all banner/channel promotions. We will look at and explain the best filters to use for this application

- 1. Year**– One of the most useful filters is the year. Adding in the year is simple yet will help narrow your view.
 - This will also cancel out any old/or ‘Copy Of’ articles/products that have been deleted (This was done in August 2021 and is beneficial for any date after)



- 2. Channel**– The channel is which banner the deals you are viewing fall under. (PNS, NW, FSQ, TRENTS, OTS, RF & HL) As products and deals are specific to a channel it can be helpful to further narrow down your view



3. Product ID – This is where you can search your specific Products/SKUs

The screenshot shows the 'My New Default View' interface. At the top, there are search filters for Year, Channel, Vendor (101497), Category, Runs in Week, Event Id, Start Week, and Product Id. The Product Id field is highlighted with a red box and contains the value '-3073061 X'. Below the filters is a 'Promo Plan' calendar view for January and February 2022. The calendar shows various promotion events like 'Club Deal - 1 Week' and 'Bonus Deal - 4 Week' with their respective durations and dates. A legend at the bottom left identifies the product and channel for the selected event.

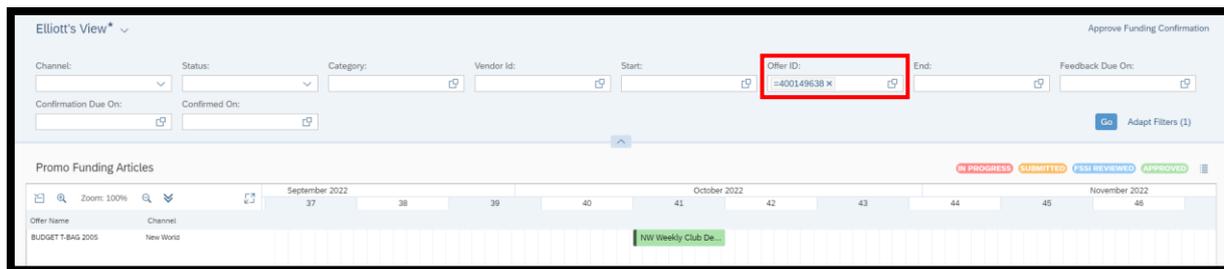
4. Status – This is where you can filter to see the status of different events/product assignments

The screenshot shows the 'My New Default View' interface with search filters. The 'Status' dropdown menu is highlighted with a red box and set to 'Approved X'. Below the filters is a 'Promo Plan' calendar view for January and February 2023. The calendar shows various promotion events like 'NW CD4 Cycle Example', 'PS Grocery & Beverage Demo', and 'TPR Cycle Example'. A legend at the bottom left identifies the product and channel for the selected event.

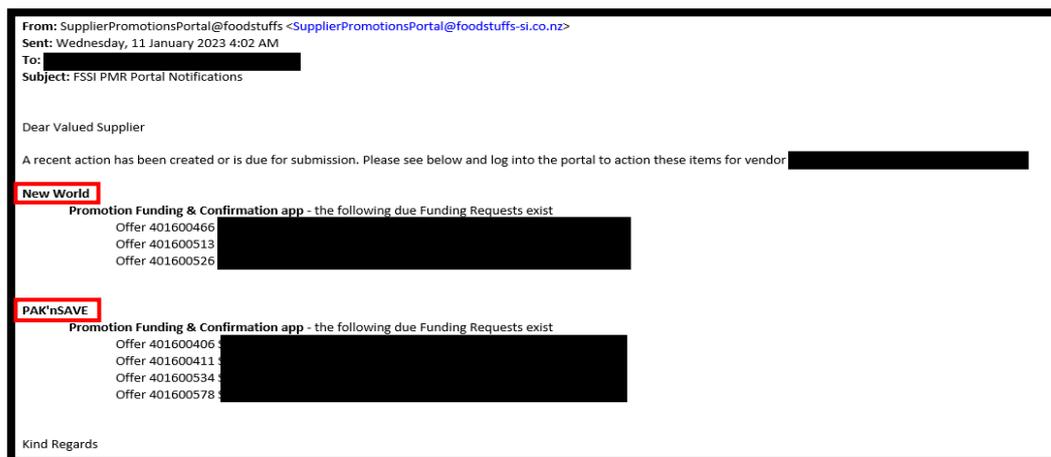
Promotions Funding & Confirmations Application

The *Promotions Funding & Confirmations Application* has fewer filters, but they can be severely more important.

- 1. Offer ID** – The offer ID can be a game changer when used in tandem with any and all ‘*FSSI PMR Portal Notifications*’ emails you receive. These have the offer numbers attached and searching for the individual Offer ID cancels our searching through multiple offers



- 2. Channel** – Which banner an offer relates to. This can also be found on any and all ‘*FSSI PMR Portal Notification*’ Emails if you are unsure what banner the offer relates to



Additional Filter Notes

- Although we have focused on individual filters, you can use multiple at one time to narrow searches down significantly
- If you are not viewing what you expect to see when using more than one filter, we suggest you go back a step and see if you have made a mistake during your searches
- If you are using filters & searching specific events, offers or products/SKUs etc. and nothing is showing try removing other filters , otherwise contact the SupplierPromoPortal Inbox to investigate
- Learn, use, and test the capabilities of what filters can do by 'Trial and Error'. Spending as little as 30 minutes next time you sign in could save you a lot of time using the FSSI Promo Portal

If you have any other questions around Filters, please contact the FSSI Supplier Promotions Portal



Supplier Promotions Portal



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