

### What are instore proposals?

Instore Proposals are offers that you, the vendor, propose directly to stores via the In-Store Proposals app in PMR.

Proposals can be made either to an individual store, or to the entire banner, but acceptance is on a store-by-store basis. A store must accept the proposal in PMR for the offer to be created in our system.

The funding mechanism(s) available for a proposal will depend on:

- The objective of the proposal
  - is it a promotion
  - or a type of temporary cost reduction
    - this includes clearance, volumetric & short-dated deals, and temporary purchase incentives
- Whether the product is direct-supplied or will come from the Distribution Centre (DC)

The funding mechanisms are:

- **Scanback**
  - Applies to individual articles during the validity period of the offer (Start Date to End Date)
  - Based on the number of units sold multiplied by the deal offered, and is calculated when the product is scanned at the checkouts (or online checkout)
    - **$Scanback = Units Sold \times Deal Amount$**
  - Available for both direct- and DC-supplied products
  - Available where the objective of the proposal is a promotion OR a temporary cost reduction (clearance, volumetric, short-dated, temp purchase incentive)
- **Off Invoice**
  - The amount that will show on your invoices AFTER the discount
  - Applies during the buy period (Start Buy to End Buy)
  - Available for direct-supplied products only
  - Available where the objective of the proposal is a temporary cost reduction ONLY (clearance, volumetric, short-dated, temp purchase incentive)
- **Warehouse Withdrawal**
  - Applies to individual articles during the purchasing period of the offer (Start Buy to End Buy)
  - Based on the number of units received by the store multiplied by the deal offered, and is calculated from when an order is received into the store
    - **$Warehouse Withdrawal = Units Received \times Deal Amount$**
  - Available for DC or direct supplied products
  - Available where the objective of the proposal is a temporary cost reduction ONLY (clearance, volumetric, short-dated, temp purchase incentive)

When entering a proposal you will need to select the **objective** (see table on next page for more detail on which objective to use when):

- Promotion
- Clearance
- Volumetric
- Short-dated
- Temporary purchase incentive

When a store accepts your proposal, this will create an offer in our system. *Note that any purchases that the store makes against the proposal may be sold before, during or after the offer period.*

**Supplier-Driven Instore Offers**

	Type of offer:	Offer objective:	Store action:	Available Funding Mechanism		
				Scanback	Off Invoice*	WW2
	<b>Promotional</b>	To have the product promoted within the store	Promote the products and claim scanback based on products sold	✓	✗	✗
Temporary Cost Reduction	<b>Clearance</b>	To clear stock by selling it as quickly as possible	Purchase products with the understanding that the product should be sold as quickly as possible via a combination of promotional sales, shelf price sales or utilising other tactics (e.g. display) at the store's discretion	✓	✓	✓
	<b>Volumetric</b>	To sell a higher volume of stock than normal	Work with Supplier to determine a volume that balances additional holding costs against the reduced cost offered	✓	✓	✓
	<b>Short-dated</b>	To sell product with a Best Before Date that is shorter than normally accepted	Accept at the store's risk. May need to work with Supplier around how the products are worked through; this may be via promotional price, shelf price or other ways (e.g. display, waste disposal of remaining product).	✓	✓	✓
	<b>Temporary Purchase Incentive</b>	To sell products to stores at a temporarily lower cost	Accept the cost based on the amount of stock the store is willing to purchase. The stock may be sold through both promotional and non-promotional sales.	✓	✓	✓

*\*Off Invoice is available for direct supply to stores only*

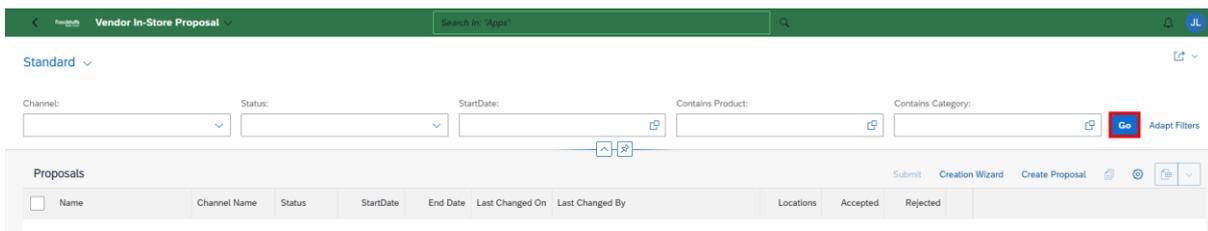
### How to create In-Store Proposals

This step-by-step guide will help you understand how to create an In-Store Proposal.

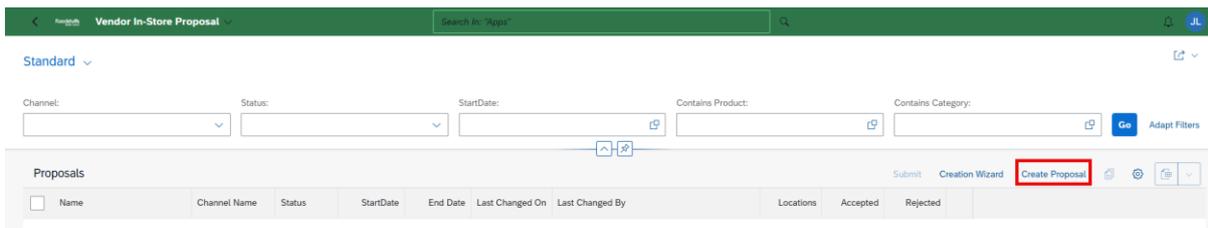
- Go to the app “In-Store Proposals”



- To view any existing proposals already created, put in the filters you want to look at, or just click “Go”



- If you would like to create a new proposal, click “Create Proposal”



**(You can use the “Creation Wizard” this is the same as “Create Proposal” however will do the processes step-by-step not all in one page)**

## Properties

- The first step is to fill out the header details:

The screenshot shows a form titled 'PROPERTIES' with the following fields and callouts:

- 1: Name (text input)
- 2: Vendor (text input with a search icon)
- 3: Channel (dropdown menu)
- 4: Objective (dropdown menu)
- 5: Start Date (date picker)
- 6: End Date (date picker)
- 7: Start Buy (date picker)
- 8: End Buy (date picker)
- 9: Note to Stores (text area with a character count of 254)

- Name** - The first section is a name that is relevant to the products that you are creating a proposal for. It can be useful if this name includes the product brand.
- Vendor** - This should be populated with your vendor. If you have more than one vendor number, you will need to put in your vendor number.
- Channel** - The channel is the banner you want to offer the proposal to.
- Objective** - This is what you would like to achieve from the proposal and informs the behaviors the store should follow. It drives the funding available to you. For more information refer back to the start of this document.
- Start Date** - The date the offer will begin. The Start date allows you to create offers up to 3 months in advance.
- End Date** - The date that the offer will finish. Offers can be no longer than 30 days from the start date. It is recommended that you only use 28 days unless the last day falls on a public holiday.
- Start Buy** - The date that stores can start purchasing products at the pricing you have offered.
- End buy** - The end buy date is the last day that the stores can purchase products included in the offer. *End Buy* should always be the same as the *End Date*.
- Note to Stores** - Direct to stores are good if there is another offer running alongside the proposed offer, or if you want to communicate a message out to the end user. If you have never run offers with this store before, please include a contact email for invoicing.

**IMPORTANT: THE START DATE/START BUY DATE CANNOT BE TODAY'S DATE AS STORES WILL NOT BE ABLE TO VIEW PROPOSALS AFTER THE START DATE**

## Funding

- After the Headers have been filled out, the next step is for you to add the articles that you want to include in the offer.
  - It is important to remember that each offer can only have one price point. This is to mitigate the potential for error.
- To add an article, you go to the plus either “**Product**” or “**Group**”. Clicking into *product* will only pull through the specific article you select whereas *group* will pull through the entire price family for that article.
  - It is recommended that you search for the article in “**Group**” before “**Product**” so you can pull through the entire family rather than just the one article.

**Pams Wraps 8pk Range**

PROPERTIES FUNDING LOCATIONS

PROPERTIES

Name: Pams Wraps 8pk Range  
 Vendor: 101497  
 Channel: New World  
 Locations (79/79)  
 Objective: Promotion

Start Date: Mar 9, 2026  
 End Date: Mar 15, 2026  
 Start Buy: Mar 2, 2026  
 End Buy: Mar 15, 2026

Note to Stores: 254 characters remaining

FUNDING

Funding (3) + Product + Group Delete Mass Edit

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

- You can delete specific articles by selecting them and clicking “**Delete**”
  - If you have accidentally clicked the wrong family of products, you can also click the tick box next to ‘*Product*’ which will highlight all articles to be removed.

**Pams Wraps 8pk Range**

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Note to Stores: 254 characters remaining

FUNDING

Funding (3) + Product + Group Delete Mass Edit

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

- The next step is to input funding for each article selected for the offer.

**PROPERTIES**

Name: Pams Wraps 8pk Range  
 Vendor: 101497  
 Channel: New World  
 Locations (79/79)  
 Objective: Promotion

Start Date: Mar 9, 2026  
 End Date: Mar 15, 2026  
 Start Buy: Mar 2, 2026  
 End Buy: Mar 15, 2026

Note to Stores:

**FUNDING**

Funding (3)

Product	Description	UoM	Warehouse Withdrawal <sup>1</sup>	Scanback Amount <sup>2</sup>	Off Invoice Price (\$) <sup>3</sup>	Direct(?) <sup>4</sup>	Discount RRP <sup>5</sup>	
<input type="checkbox"/>	4274245	PAMS WRAPS SPINACH 8PK	EA	0.00	0.00	0.00	No <input type="radio"/> X <input type="radio"/>	0.00
<input type="checkbox"/>	4273838	PAMS WRAPS WHEATMEAL 8PK	EA	0.00	0.00	0.00	No <input type="radio"/> X <input type="radio"/>	0.00
<input type="checkbox"/>	4273615	PAMS WRAPS WHITE 8PK	EA	0.00	0.00	0.00	No <input type="radio"/> X <input type="radio"/>	0.00

**1 to 3:** Funding mechanisms; refer back to the start of this document and remember that the objective drives the funding available for the proposal.

**4: Direct (?)** – This is asking if your product is supplied direct to store or purchased via our distribution centre/s. 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 unless you wish the store to purchase it direct. 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.

**5: Discount RRP** – This is where you can enter a discounted recommended retail price for the products included in the offer and all discount RRP’s must be the same. It is important to note that the store can change this price. If hitting a specific RRP is key, please contact and work through with stores as needed.

- When doing funding for a proposal, there is a quick feature you can use to complete all funding for articles at once. This is the ‘*Mass Edit*’ button/function.

**PROPERTIES**

Name: Pams Wraps 8pk Range  
 Vendor: 101497  
 Channel: New World  
 Locations (79/79)  
 Objective: Promotion

Start Date: Mar 9, 2026  
 End Date: Mar 15, 2026  
 Start Buy: Mar 2, 2026  
 End Buy: Mar 15, 2026

Note to Stores:

**FUNDING**

Funding (3)

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

- This option is very useful to input the funding data for ALL selected articles at once. **Please ensure that the source of supply is the same for all selected.**
  - Please note that if you enter data before using the Mass Edit tool, the original data will be overridden with the data entered from the Mass Edit tool.
  - If you need to change ONE funding section specifically and you are using the Mass Edit tool, you will need to enter all information for the five sections again, as it will reset all sections and delete the original information.
  - If you enter information through the mass edit which is not allowed for the Objective for the proposal, you will get an error message when you try to save the offer.

The screenshot shows a 'Mass Edit' form with the following fields and callouts:

- Warehouse Withdrawal:  (Callout 1)
- Scanback Amount:  (Callout 2)
- Off Invoice Price \$:  (Callout 3)
- Off Invoice %:  (Callout 4)
- Direct?:  No  X (Callout 5)

Buttons: Ok, Cancel

**(Numbers attached relate up to the normal funding numbered bullet points)**

### Locations

- The last step for creating an in-store proposal is selecting the stores you wish to offer the proposal to. The stores you will be able to select from will be associated with the channel you selected in the **Properties** section.
- Go through the list and select the stores required:

LOCATIONS

Locations (63/102) [Select All](#) [Select None](#)

Include	Location	Number	Status	Offer	Decline Reason
<input type="checkbox"/>	New World Winton (Old)	8072			
<input type="checkbox"/>	New World Winton (Old)	8104			
<input checked="" type="checkbox"/>	New World Winton	8118	Declined		
<input checked="" type="checkbox"/>	New World Windsor	8070			
<input type="checkbox"/>	New World Wigram (Old)	8060			
<input checked="" type="checkbox"/>	New World Wigram	8133			
<input checked="" type="checkbox"/>	New World Westport	8057			
<input type="checkbox"/>	New World Wanaka (Old)	8091			
<input checked="" type="checkbox"/>	New World Wanaka	8144	Declined		Not stocked
<input checked="" type="checkbox"/>	New World Centre City	8117	Accepted	404855129	
<input checked="" type="checkbox"/>	New World Blenheim (Old)	8097			

- If you send it to the sites that end in “(Old)” or “(Closed)” – these are the site numbers that are no longer used so will never accept the proposal. If you are wanting to track who is accepting the proposals you are sending, then it is recommended you remove them.
- At the start of the list there are unnamed but numbered stores.
  - Best practice is to include all stores in a list to capture any Change of Ownerships if you are offering to all stores.

### Submitting, Revoking or Deleting Proposal

- Once you have completed all steps for creating an in-store proposal, you can go ahead and 'Save' the proposal. (Please note this is not submitting the proposal to stores)

- This will then allow open access to the below:

- Edit** – This will allow you to make further changes to the proposal.
- Submit** – Once you have created and saved the proposal, you can now click 'Submit'. This will send the proposal to all selected stores.
- Revoke** – If you have submitted a proposal with an incorrect price or wish to withdraw the proposal from anyone who hasn't already accepted, you can use the 'revoke' button.
  - Please note: If you revoke a proposal, PLEASE directly contact the stores which have already accepted the proposal as they will still bill you for product.**
- Copy** – If you wish to re-create the same proposal but change the dates or banner, you can use the 'copy' button.
- Delete** – If you wish to delete the offer, click the delete button.