Trade Promotion Management



Trade Promotion Management

- > What is the role of Trade Promotion Management (TPM)?
- Frequently Used Forms
- How are claims calculated?
- > Exchange Partners On-Line (EPOL)
- Claim Adjustments
- Post Audit





- Support team for the buying staff
- > Provide education for negotiated allowances
- > Billing support on all Trade Promotion activity:
 - > Advertising
 - > Price Protection
 - > Margin Recovery
 - > Vendor Compliance
 - > And much more



EXCHANGE Business Terms Agreement (BTA)

Documents standard negotiated allowances

- Media
- > Market Development Funds
- Logistics
- Volume Rebates
- > Vendor signature required





Business Terms Agreement (BTA)

		Anny	o A				ange Service (The Exchange) erms Agreement						
Supplier Name	e & Address				Busin	055 1	Agreement Dates:						
							This agreement becomes effective on and will remain effective until a future agreement is executed. Supplier Contact Information:						
The terms nego	diatori will be	dark orthold for	um the Ev	chan		Cision	Name:						
can be viewed o							Phone Number:						
Cash Terms:				_			Email:						
Duns Number:		P	O Minimu	im:			Provide in store service? Yes No						
Federal Tax ID: Lead Time:							If yes, complete Store Level Agreement (SLA).						
	Paid 🗸	1		en P	aid 🗸		General Remarks:						
Credit Memo	Check	Monthly	Qrtrly	-	ni Annual	Annual	_						
Credit Metho	CIPELA	wontiny	Gereriy	966	ni Annuai	Annual	-						
	Allowance T	уре		%	Dollar	Amount							
Co-op Advertisi	no		- 1		1								
Volume Rebate							FOB Terms for Domestic Suppliers: Destination Origin e-Com						
Volume Growth	Rebate (if o	ffered please					For International Shipments:						
provide details							Incoterms:						
Market Develop	ment Fund ((MDF)					FOB Origin (OR) FOB DESTINATION						
Fixture Purchas	e						Click for Incoterms Definitions						
Signs													
Air Freight Allow	vance												
Distribution Allo	wance						Importer of Record responsible for Customs clearance and duties:						
Return Defectiv							Exchange Supplier						
General Accrua Other:	el .		-				All Shipping Points with oddress for melt: provide objeing point addressingle or a sponse page gloced of						
DETUDN D		andor Mu	t Choo	10	otions P	alouu	_						
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- > Form is located on Exchange Partners On-Line
- > Documents per event offers/negotiations
 - > Bill Back/Scan Back
 - Markdowns
 - > VPR's
 - > Advertising Support
 - > Stack out/Pallet Promotion
 - > New Item Allowances

DOF is emailed to TPM at <u>coop@aafes.com</u>

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Deal Offer Form

Not Complete		Proc Code incomp	olete,Deal Typ	e incomplete,St	art Date Incon	nplete,End Date I	ncomplete,Locat	tions Incomplete,	
	Deal Offer Form						_		
Submit Date:		_Buyer:		_					
Supplier Name: Procurement Number (Number to Contact Name: Contact Email: Type of Deal Description Advertised Week # Start Date	be Billed)	Phone -	dor Nu pe of D		Dat	tes		Not (Complete
Method of Payment		_					_		
	Locations						_		
Worldwide				-					
Conus				_					
Alaska/Hawaii				_	_				
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- > Form to be reviewed during negotiations with the buyer
- Needs to include the service coordinator point of contact, phone number and email address





Service Level Agreement (SLA)

Service Level Agreement

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Vendor Name:			-	_	-1-														
Department:																		g	
Vendor Payment Code:																		ncir	
Vendor Procurement Code:							ିତ										Level	Balancing	
Buyer:							ndis										al	ss B	
Vendor Point of Contact (Name):							chai										Local	Cross	
Phone Number:							Merchandise)										on a		
Email:	1					Introduction of New Items/Deleted Items											ut o	Excesses for	
Vendor Servicing Organization:						ed It	Product Write-Offs (Damage/Defective					Merchandise	Events		Cuts		Management	ces	
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VSO Phone Number:		ocia				Ğ	age	ocks	e			erch	cial	νų	Price		Man	Top	
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Store Type	Ē	Ē	Рго	Se	Plan	Intr	P	Pro	Me	Stc	S	ч	ő	Ve	Ť	Bu	ŝ	Pr	đ
Main Store/BX-Pxtra																			
Shoppette																			
Class 6	L																		
Auto	\square																		
MCSS	\vdash																		
Furniture Store	\square																		
Other (Sports Store, Book Store, etc.)	\square																		



Volume Based Claims

Percentage based claim

> Calculation is based on invoices processed during claim period

Claim periods

- Monthly
- > Quarterly
- Semi-Annual
- Annual

Claim Types

- > Coop Advertising
- > Defective & Returns
- > Distribution
- > Freight
- Volume Rebates





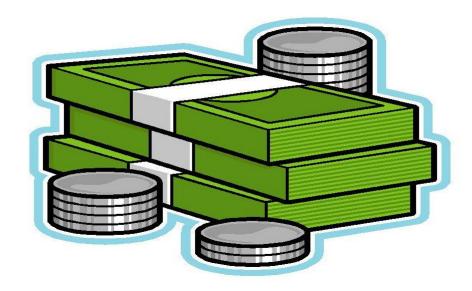
- Volume Rebate claims are calculated for each calendar year, regardless of the start date of the agreement for all applicable procurement codes.
- > There are three different ways to calculate the volume rebate:
 - Volume applies % of maximum threshold achieved to all invoice dollars.
 - Growth applies the % if the threshold is met to only those dollars in the threshold(s) achieved.
 - Progressive applies the % of each threshold to the dollars in that threshold.
- All volume rebates are assumed to be calculated as volume unless otherwise specified as growth or progressive in the agreement.



Recovery Claims

> There are three main margin recovery claims

- > Price Protection
- Markdown Support
- > Sales





- Price Protection and Markdowns
- Facility Inventory
 - > Run the Saturday after the effective date
 - > Exchange system limitations only allow weekly inventory
- Store Sales
 - > Run from the effective date to the facility inventory date
- > Warehouse Inventory and Due Ins
 - > Run on the effective date
- Merchandise in Transit
 - > Shipments between facilities
 - > Run on the Sunday after the effective date



- **Scan Backs and Bill Backs**
- Quantities sold during the effective dates
- > Locations are critical and based on DOF or SPS bulletin
 - > SPS claims do not include all facilities
- Percentage based discounts are calculated off of the cost price
- > When pulling sales from EPOL, include all applicable vendor codes
- > Ecomm promotions will be billed on separate claims





Advertising Opportunities

Print Advertising

- > Weekly Sales Flyer/Express Sales Flyer
- > Operation: BeFit! (Wellness Publication)
- > Specialty and Glam Books
- > Exchange Coupon Book

Digital TV-Radio-Theater

Internet

- > Exchange Website
- > The Exchange Catalog
- > Health and Wellness Site- OpBeFit.com

Social Media

> Facebook, Twitter, YouTube, Pinterest, Mobile Marketing

Point of Purchase Signing

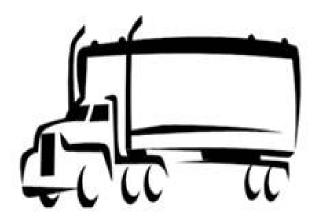
- > Posters, Endcap Panels, Outdoor Banners, Shelf Poppers
- > Additional Opportunities



Vendor Compliance Types

Automated Early Late VNC Program

- > 7 Day ship window for origin or destination
- > Only includes purchase > or = to \$300
- > CONUS only
- > Electronic Data Interchange (EDI)
- Accounts Payable
- Quality Assurance





TPM Claim Format

		HANGE					
Trade Allowance Claim							
REMIT TO: Army & Air Force Exc ATTN: FA/C/GA P.O. BOX 660792 DALLAS, TX 75266-07		Claim Number: DV000 Invoice Date: 01 AP					
		TERMS: Net 30 Da	iys				
BILL TO:		Direct Claim Quest	ions to:				
Customer Numbe	~~	TEL: (214)312-61(E-Mail: coop@a					
	2.7028						
Date	s Type Week Quantity -31 MAR 12 A.36.D MR/12 1.00		nt Due 500.00				
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TPM Claims Online (EPOL)

- > TPM claims and proof of performance are posted at Exchange Partners On-Line (EPOL)
 - https://partners.aafes.com/EPOL/Login.aspx
- Suppliers must be registered on EPOL to receive and view claims
 - > Contact your buyer for access
- Suppliers will receive an email alert when a claim has been generated or revised

From: coop@aafes.com [mailto:coop@aafes.com] Sent: Friday, May 24, 2013 12:01 AM To: John Doe Subject: Vendor Partner Claim Notice

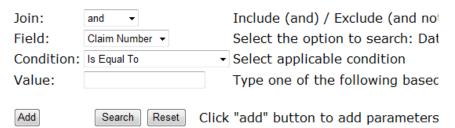
Good Day, John . You have one or more Trade Promotion Management (TPM) claim(s) ready to be viewed on Partners

Vendor code / Procurement number	Vendor Name	Claim Date	Claim number					
12345678	ABC Company	5/23/2013	VO000123456					
To view your claims online: <u>https://partners.aafes.com/EPOL/Login.aspx</u>								
For issues please contact <u>coop@aafes.com</u>								

EXCHANGE Vendor Claim Search EPOL

- Claim copies and backup should be available under Vendor Claim Search
- > Detail for many claim types are in the body of the claim
 - > Sales
 - Invoices
 - Purchase Orders
 - Inventory

Search Parameters



Current Search Parameters: Upon completion of parameter selection

proc_vendor_code = '000000000100'

	Claim Number	<u>Date</u>	<u>Type</u>
ᆋ	BB000572075	29 JAN 2014	pdf
ᆋ	SI000571069	25 JAN 2014	pdf
저	FX000538124	16 JAN 2014	pdf
ᆋ	AC000561332	15 JAN 2014	pdf
고	PS000565892	14 JAN 2014	pdf
ᆋ	FX000565205	10 JAN 2014	pdf
ᆋ	FX000565202	10 JAN 2014	pdf



Revision/reversal process of a Trade Allowance Claim

Claim Adjustment Form

- > Internal document used for revisions/reversals of claims
- Must be received from buyer before processing any revisions in TAMS
- Revisions/reversals will be posted to Exchange Partners Online (EPOL) the following day
 - https://partners.aafes.com/EPOL/Login.aspx
- For refund information please contact FA Co-op at <u>FACoop@aafes.com</u>



- > The objective of a post audit firm is to offer a "profit recovery" audit by providing solutions to improve the bottom line.
- > Claim categories that post auditors review:
 - Missed/Incorrect allowances
 - > Vendor compliance guidelines/freight bill violations
 - > Pricing discrepancies
 - > Billing errors
- Supplier has 30 days to submit payment or dispute. If no response, the claim is deducted from a future accounts payable payment.



Post Audit Recoveries

Post Audit Timelines

- > TPM Real Time (Feb Jan)
- > Primary Profit Recovery Group (PRGX) Prior fiscal year
 - > Admindac.claimtrax@prgx.com
- > Secondary Connolly Consulting (CCA) Two years prior
 - > Cynthia.McCarthy@connolly.com

PRGX





Questions:



> Please send all inquiries to coop@aafes.com.