

# Acumen Invest – Latest updates

May 2021



# Agreements

# Agreements

Select from your internal or customer periods to quickly populate date ranges

Agreements can be set at any level of the customer hierarchy

Tabular downloads exist if you need to view data locally

The screenshot shows the Acumen web interface for the 'Agreements' section. At the top, there's a navigation bar with 'Home', 'Data Management', 'Promotions', 'Reporting', and 'Admin'. The 'Data Management / Agreements' breadcrumb is visible. Below the navigation, there are several filter dropdowns: 'Plan' (Forecast), 'Periods' (2020), 'Date range' (01/01/2020 - 31/12/2020), 'Market' (UK), 'Channel' (Retail), and 'Customer' (Asda). A 'DOWNLOAD LIST VIEW' button is located to the right of the filters. Below the filters, the text 'Forecast • 01/01/2020-31/12/2020 • UK • Retail' is displayed. A table with 10 columns (Description, Customer Scope, Product Scope, Discount, Allocated Stock, Status, Date range, Actions) contains 4 rows of agreement data. At the bottom left, there's a pagination control showing '1' items per page. At the bottom right, it says '1 - 4 of 4 items'. A 'DOWNLOAD LIST VIEW' button is also present at the bottom right of the table area.

Description	Customer Scope	Product Scope	Discount	Allocated Stock	Status	Date range	Actions
Agricola Partnership Marketing	Asda	10148, Agricola Agricol... 10159, Agricola No Sug...	GBP 0.10 Per Case	All	Committed	01/01/2020 31/12/2020	
Golden Hop Partnership Marketing	Asda	10010, Golden Hop Blon... 10013, Golden Hop Reg...	GBP 0.05 Per Case	All	Committed	01/01/2020 31/12/2020	
Logistics / handling	Asda	Golden Hop	3% % List Price	All	Committed	17/06/2020 30/06/2020	
POS material	Asda	10013, Golden Hop Reg...	GBP 2,000.00 Lump Sum	All	Committed	05/08/2020 25/08/2020	

Agreements can be edited or duplicated with a single click

The Agreements screen is our replacement for the "other investments" screen in Invest. Its where you go to capture any long-term agreements (also known as discounts, investments and trade terms!) that you might have with your customer.

When you're on the screen, you start by selecting a customer scope - this can be as specific as a sub-customer or as wide as an entire market. When you run it, you'll see every agreement that matches that scope.

# Agreements

Agreements follow custom workflows that control when they impact your P&L

A wide range of calculation mechanics can be defined as per your business needs

The screenshot displays the Acumen software interface. At the top, there's a navigation bar with 'Home', 'Data Management', 'Promotions', 'Reporting', and 'Admin'. The main header shows 'Global Drinx'. The left sidebar has 'Data Management / Agreements' and 'Agreements' with a sub-menu for 'Forecast'. A modal window titled 'Forecast • Edit ACC Agreement • Asda' is open, showing the following details:

- Agreement Details:** Description: Agricola Partnership Marketing
- Status:** Committed
- Mechanic:** Per Case
- Agreement Scope:** Periods: 2020, Date range: 01/01/2020 - 31/12/2020
- Product scope:** AgriCola, Regular, Can, 33cl, Agricola Agricola Can 330ml, 10148

A 'SAVE' button is located at the bottom right of the modal. In the background, a table lists agreements with columns for 'Description', 'Customer Scope', 'Date range', and 'Actions'.

You can choose to edit or add agreements. Adding new ones will save for the scope you have run, allowing you to set them at any level of the hierarchy.

Custom scopes can be defined for any level of your product hierarchy

# Agreements

Add or remove product scopes as needed to get to any combination of products

Once created, you can modify a range of properties about the agreement, including how it calculates, what status its at with your customer and the actual amount of the discount.

The screenshot displays the Acumen software interface. At the top, there's a navigation bar with 'Home', 'Data Management', 'Promotions', 'Reporting', and 'Admin'. The main header shows 'Global Drinx'. The left sidebar has 'Data Management / Agreements' and 'Agreements' with a 'Plan Forecast' dropdown and 'Periods 2020'. A 'Forecast • Edit ACC Agreement • Asda' modal is open, showing 'Agreement Scope' with 'Periods 2020' and 'Date range 01/01/2020 - 31/12/2020'. The modal contains an 'Amount' field with '£0.10', an 'Allocated Stock' field, and a 'Product scope' section with two items: 'Agricola Regular Can 33cl' (10148) and 'Agricola No Sugar Can 33cl' (10159). A 'SAVE' button is at the bottom right. The background shows a table of agreements with columns for 'Description', 'Customer', and 'Date range'.

Invest presents a live view of the impacted products

"Save and Copy" options exist to streamline the capture of agreements

# Feedback

Please send to [feedback@acumenci.com](mailto:feedback@acumenci.com)