


Analytical Entry Template

Create and manage templates for frequently used analytical entry. Below actions are available under **“Analytical Entry Template”**:

-  Create new analytical entry template; update, delete, view and search for analytical entry template details, for report and decision making

Analytical Entry Template

Template Code

AET-01

Analytical Entry Template Name

Analytical Entry - Default Brand Allocation - Lux...

Template Code

AET-01

Template Name

Analytical Entry - Default Brand Allocation - Luxola

Trade Type	Channel	Percentage1	Brand	Percentage2	Category	Percentage3
TT02 - Third Pa...	B04/01 - Luxola	100	BD01 - Dr.Jart	10	CT01/02/02 - ..	8
		0		0	CT01/02/01 - ..	2
		0	BD05 - L'Oreal...	30	CT01/01/01 - ..	10
		0		0	CT01/01/03 - ..	20
		0	BD06 - Vichy	15	CT02/02/01 - ..	8
		0		0	CT02/02/02 - ..	7
		0	BD03 - Lancas...	10	CT02/03/01 - ..	10
		0	BD07 - SK II	20	CT02/04/01 - ..	5
		0		0	CT02/02/01 - ..	8
		0		0	CT02/02/02 - ..	7
		0	BD09 - Calvin ...	8	CT05/02 - Pres...	8
		0	BD10 - Bulgari	7	CT05/02 - Pres...	7

Balance0

Create NewSaveRevertDelete

Selected row 1 from the Total 1 records.

Field Name	Description	Mandatory Information
Template Code	Custom code for the template	Y
Template Name	Name of the analytical entry template	Y
Trade Type	Select the types of trade	Y
Channel	Channel group in Accounts – Analytical Groups	Y
Percentage1	Percentage rate for the channel, total sum of the whole column must be 100%	Y
Brand	Brands group in Accounts – Analytical Groups	Y
Percentage2	Percentage rate for the brand, total sum of the whole column must be 100%	Y
Category	Category group in Accounts – Analytical Groups	N
Percentage3	Percentage rate for the category, total sum of the whole column must be 100%	Y

Create New Analytical Entry Template

1. Click **“Create New”** button at the bottom right side of screen

Trade Type	Channel	Percentage1	Brand	Percentage2	Category	Percentage3
TT02 - Third Pa...	B04/01 - Luxola	100	BD01 - Dr. Jart	10	CT01/02/02 - ...	8
		0		0	CT01/02/01 - ...	2
		0	BD05 - L'Oreal...	30	CT01/01/01 - ...	10
		0		0	CT01/01/03 - ...	20
		0	BD06 - Vichy	15	CT02/02/01 - ...	8
		0		0	CT02/02/02 - ...	7
		0	BD03 - Lancas...	10	CT02/03/01 - ...	10
		0	BD07 - SK II	20	CT02/04/01 - ...	5
		0		0	CT02/02/01 - ...	8
		0		0	CT02/02/02 - ...	7
		0	BD09 - Calvin ...	8	CT05/02 - Pres...	8
		0	BD10 - Bulgari	7	CT05/02 - Pres...	7

Balance: 0

Create New Save Revert Delete

2. Fill up analytical entry template's information on the right side of the screen

Trade Type	Channel	Percentage1	Brand	Percentage2	Category	Percentage3
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3. **“Balance”** field at the bottom right side of screen shows how many percent left unassigned from the total sum of entries for Percentage3 column. Each percentage column must sum up to 100% such that the balance value would be 0 (zero)

Template Code: AET-02 Template Name: Analytical Entry - Default Brand Allocation - Tangs

- Third Party	/01 - Tangs		D06 - Vichy	20	Face Wash	20
Trade Type	Channel	Percentage1	Brand	Percentage2	Category	Percentage3
TT02 - Third Pa...	B02/01 - Tangs	100	BD03 - Lancas...	20	CT01/01/01 - ...	10
		0		0	CT01/01/02 - ...	10
		0	BD04 - Maybe...	20	CT01/01/03 - ...	20
		0	BD05 - L'Oreal...	15	CT01/02/04 - ...	10
		0		0	CT02/01/01 - ...	5
		0	BD07 - SK II	25	CT02/04/02 - ...	20
		0		0	CT02/01/02 - ...	5

Balance: 20

Create New Save Revert Delete

Each Brand line entries for Percentage 3 values must add up = Percentage2 value (see below image for example)

Template Code: AET-02 Template Name: Analytical Entry - Default Brand Allocation - Tangs

- Third Party	/01 - Tangs		D06 - Vichy	20	Face Wash	20
Trade Type	Channel	Percentage1	Brand	Percentage2	Category	Percentage3
TT02 - Third Pa...	B02/01 - Tangs	100	BD03 - Lancas...	20	CT01/01/01 - ...	10
		0		0	CT01/01/02 - ...	10
		0	BD04 - Maybe...	20	CT01/01/03 - ...	20
		0	BD05 - L'Oreal...	15	CT01/02/04 - ...	10
		0		0	CT02/01/01 - ...	5
		0	BD07 - SK II	25	CT02/04/02 - ...	20
		0		0	CT02/01/02 - ...	5

Balance: 20

Create New Save Revert Delete

4. Click **"Save"** button at the bottom right side of screen when done

Update Analytical Entry Template Details

1. Click on analytical entry template to be updated, it will bring up the selected template details on the right side of the screen
2. Click **“Save”** button at the bottom right side of the screen when done with the updates

Delete Analytical Entry Template

1. Click on analytical entry template to be deleted, it will bring up the selected template on the right side of the screen
2. Click on **“Delete”** button at the bottom right side of screen
3. Click on **“Yes”** button on the pop-up window to confirm template deletion

The screenshot displays the 'Analytical Entry - Default Brand Allocation - Luxola' interface. At the top, there are fields for 'Template Code' (AET-01) and 'Template Name' (Analytical Entry - Default Brand Allocation - Luxola). Below these is a table with columns: Trade Type, Channel, Percentage1, Brand, Percentage2, Category, and Percentage3. The table contains several rows of data, including entries for 'TT02 - Third Pa...', 'BD01 - Dr. Jart', 'BD05 - L'Oreal...', 'BD06 - Vichy', and 'BD10 - Bulgari'. A dialog box titled 'Deleting record?' is overlaid on the table, asking 'Do you really wish to delete this record?' with 'Yes' and 'No' buttons. At the bottom of the interface, there is a 'Balance' field showing '0' and a row of buttons: 'Create New', 'Save', 'Revert', and 'Delete'. The 'Delete' button is highlighted with a red rectangle.

Trade Type	Channel	Percentage1	Brand	Percentage2	Category	Percentage3
TT02 - Third Pa...	B04/01 - Luxola	100	BD01 - Dr. Jart	10	CT01/02/02 - ...	8
		0		0	CT01/02/01 - ...	2
		0	BD05 - L'Oreal...	30	CT01/01/01 - ...	10
		0		0	CT01/01/03 - ...	20
		0	BD06 - Vichy	15	CT02/02/01 - ...	8
					CT02/02/02 - ...	7
					CT02/03/01 - ...	10
					CT02/04/01 - ...	5
					CT02/02/01 - ...	8
					CT02/02/02 - ...	7
					CT05/02 - Pres...	8
		0	BD10 - Bulgari	7	CT05/02 - Pres...	7

Balance: 0

Create New Save Revert Delete

View and Search for Analytical Entry Template Details

1. Enter search parameter to filter the result, i.e. type in the analytical entry template name in the search textfield box at the top left of the template' table
 2. Click on analytical entry template to view, it will bring up the selected template details on the right side of the screen
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