Managing trade terms

Quick guide concept

Through a number of easy steps you learn how to use the software.

Each step is numbered and defines a phase. Each phase contains a short description and an illustration to show how to navigate or operate in the software.

Principle

A trade term consists of the name, period the trade terms is valid within, which dimension and key it is applied to, and the different discounts stated, when you created the trade term.

This Quick guide will show you how to navigate in trade terms. First you learn how to create a trade term, then how to export it into Excel, how to import and at last how to maintain your trade terms.

The guide *may* contain important general notices. These will be marked with an exclamation icon.

Tips and tricks are marked with an Info-icon.

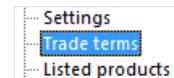Questions & Answers note relevant to the topic at hand.

Create

1 Select customer

Click on Customers in ribbon and select customer in the drop-down list.
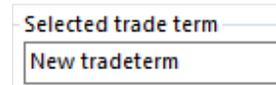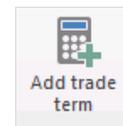
2 Go to trade terms

Click on Trade terms in left navigation pane.

3 Create and set name for new trade term

Click on Add trade term in ribbon: A new term is created.
Select the new trade term and rename in upper right corner under Selected trade term by overwriting "New tradeterm".

4 Set the discounts for the trade term

Enter the discounts for the trade term in the chart below the name. Enter discount % directly or use the arrows.

The discount names are setup in system options under P&L setup. If you want to change these, go to file above the ribbon, choose system options, and here you choose P&L setup.

### 5 Set date

Set from date for trade term.
When you create a new promotion, BMS will by default set the field of the end date blank. No end date = infinity. First when you create a new trade term period, BMS will create an end date for the previous trade term.

6 Allocate trade terms to products

When you need to match the specific trade term to a product, you have to define Apply to dimension. Here you choose the product property, whether you want to match it with a brand, category or something third.
Then you have to define Apply to key. Here you match the product property with a key. This could e.g. be the product line (Hair, Liquid etc.).
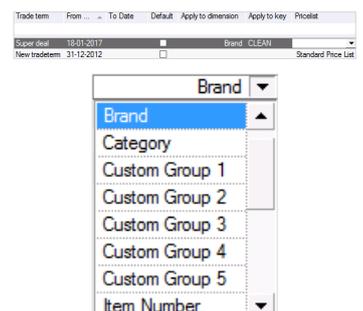
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The names and numbers of discount is company specific as well as the calculation method. Defined in system options.

Export

1 Export trade term data to an Excel file

Click on the Export icon in ribbon.
An Excel file opens, and you are able to save the document in the same way, you would save an Excel file on your computer.
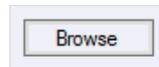
You can use the Excel file as a template for formatting the changes of the trade terms.

Import

1 Import file to BMS

Click Import icon in ribbon.
A new window opens, now click Browse to import a document from your computer.
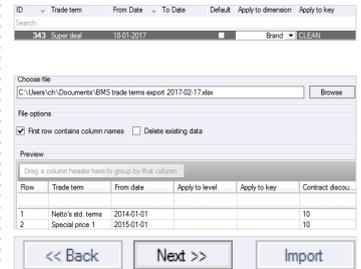
2 Choose your file

Your folders now open in a new window.
Choose the file you want to open and press open or double-click it.
Now the file is displayed as a preview in the first window.

3 Insert the data

Check the data, click next, and check the data again, next and at last click Import. Now the imported trade terms has been inserted.

Maintenance

1 Change trade term when you have to adjust a term after customer negotiations

You can add a change to a trade term from a specific date.
Select the trade term, right-click and select New period on trade term.

When you change names for trade terms with the same ID, BMS will change both of their names, as the system sees them as the same trade term but with different periods.
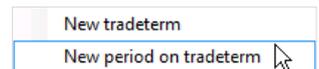
2 Change start date and adjust %-discounts

BMS will create a copy of the term. Change the from date to the 1st valid date of the adjusted terms. BMS will automatically change the current terms end date (visible next time the window is opened). Adjust the terms accordingly by changing the discount % as above.

3 Deleting trade term(s)
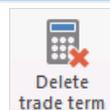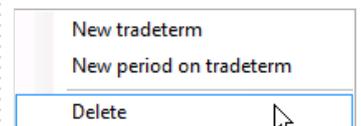
If you want to delete a trade term, either right-click on it or click Delete trade term in ribbon. A box pops up asking if you want to delete. Click yes.

You can only delete one trade term at a time. If you want to delete more trade terms at once, you can do this when importing trade terms and selecting Delete existing data. In this way you delete the already existing data.

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ⓘ Define trade terms

In System options, under General options, you can define how you want trade terms to be displayed/handled in BMS.
You have three options. In the first, trade terms are handled as sets of discounts. Here, there trade terms are listed, and then you can select the different discounts for these.

In the second, trade terms are individual conditions. Here the different discounts are listed, and you can then select e.g. which products these should include.

The third option, Trade terms are loaded from custom interface, is a combination of the two previous. Here you have both options.

Below are picture examples of each of these options.

Trade terms

○ Trade terms are handled as sets of discounts
● Trade terms are individual conditions
○ Trade terms are loaded from custom interface

Trade terms

ID	Trade term	From Date	To Date	Default	Apply To dimen...	Apply to key	Pricelist	Contract discounts %	Other %
Search...									
326	Winegum	31-12-2011		☐	Brand	CANDY		50,000	0,000
267	COOP Tomat	01-01-2012	31-12-2022	☐			Standard Price List	25,000	3,000
226	General COOP Terms	01-01-2010	31-08-2015	☐	Item Number		Standard Price List	30,000	10,000
226	General COOP Terms	01-09-2015	31-10-2015	☐	Item Number		Standard Price List	31,000	10,000
226	General COOP Terms	01-11-2015	30-04-2017	☑	Item Number		Standard Price List	31,000	5,000
226	General COOP Terms	01-05-2017		☐	Item Number		Standard Price List	31,000	5,000

Conditions

Drag a column header here to group by that column..

Condition ID	P&L line	Value calculation	From Date	To Date	Value	Amount pr. unit	Total amount	Brand	Sub brand
Search...									
1	Logistic rebate %	% of Balance	11-09-2017	30-09-2017	0	10	200	BODY	Creme
3	Loyality %	% of Invoice	07-08-2017	14-08-2017	0	0	0	CLEAN	ECO

If you select another option of how to handle your trade terms than you have used before, then be aware that your "old" trade terms will not follow to the new setup.

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How do I edit the discount starting from next month?

You have to add a new trade term period and change the discount on the new period.

How do I name my trade term?

You mark the trade term and go to the right side of the window to change the name.

How do I create a trade term for a specific brand?

Go to trade term line, click on apply to dimension, select brand, click on apply to key, type in brand name.

How do I define the price list for the trade term?

Go to trade term line, click in the pricelist field of the product and click the dropdown list. Here you can select the pricelist you want to.

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