Creating customers

Introduction

This Quick guide will show you how to create a new customer. The data that needs to be filled in is; customer name, number, customer type, settlement, calculation method and delivery profile. In the end you have a new customer in BMS.

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.

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.

1 Add new customer

Select File/New in upper left corner and click on Customer icon. A new customer window opens up automatically (New customer/ Settings/Basic Data).

2 Name the customer

Enter Customer name and Customer number (identical to number in ERP system).

3 Define customer – top level or banner

Enter Customer type:
Top level customer = Wholesaler
Banner = A chain below a wholesaler.
If banner is selected, select the top level customer in the dropdown list.
Check Use tradeterm from "top level*"*, if no specific trade terms are valid for the banner.
Other settings are company specific.

4 Promotion Settings (*New customer/ settings/Promotion Settings*)

Settlement: Select Sell in, if variable promotion allowances are based on sell in. Alternatively, select Sell out.

Define default start and end date for promotion with the customer by using the arrows.

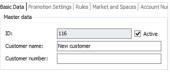**5 Define default settings for promotion allowances**

If you are using:
1)   Variable promo allowance on invoice: Define default calculation method in drop down (here "% of Gross" is defined) and enable if discount can be given as % or amount.
2)   Variable off invoice %-promotion allowance: Define default calculation method in drop down (here "% of Invoice" is defined) and enable discount as %.
3)   Variable off invoice €-promotion allowance (fixed amount/unit): Define default calculation method in drop down (here "Amount" is defined) and enable discount as amount.
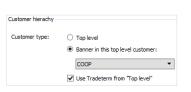4)   Default Fixed allowances – here defined as Off invoice.

Tip: You can enable other options if they are used on the customer.
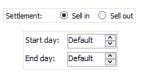
6 Set default promotion delivery template for the customer

Forecast for every promotion will be allocated to a delivery week. Promotion in store week is week 0, and -1 is the week before. -2 is 2 weeks before. In the example, default delivery is set to 80% 2 weeks before and 20% 1 week before for SKU. For display default delivery is 100% 2 weeks before. Need for more weeks: Right click in table and select Add to first or Add to last.

Effectmakers

How do I add a week to the delivery profile?

Go to Settings, and under Promotion Settings, you find the Delivery profile template for new promotions. Right-click within the area and choose Add to first.
You can also remove a week by clicking Remove from first instead.

Where do I maintain the customer's item number?

Go to listings and find the Customer item number in the menu of the listing.