Quick guide for BMS

Introduction

This Quick guide will show you how to setup planning windows. The data that needs to be filled in is; name, streams, filter, period, columns, totals, settings, and views. In the end you can navigate and edit the planning window.

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.

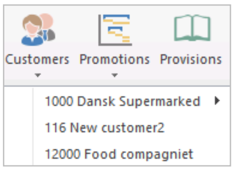
Setup planning window

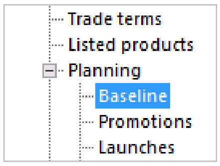
The Setup planning windows, from the BMS version 17.8 and after, is part of the Planning Board. Thus, the following guide is valid for older versions.

Edit layout

1 Open customer and click baseline

Find Customer in ribbon and choose the customer you want to work with. You can both choose top level customer or banner level customer.
In the menu to the left, find Baseline under Planning.





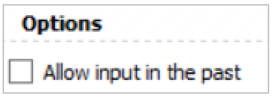
Other costs works the same way as Baseline. The only difference is that baseline is per unit, where other costs are in value.

2 Edit layout

Click Edit Layout in Planning ribbon to setup the baseline window.
The tab window changes.

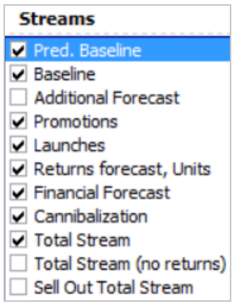
3 Enter name

In View Name enter the name you want of the view. This count for all view. Editing in this view does not change the other views, so you have to edit one at a time.
Check in Options, Allow input in the past, if you want to edit in previous years.



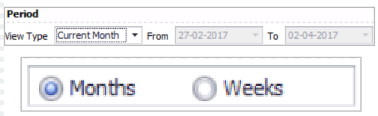
4 Streams

In Streams check or uncheck the streams you want to be displayed in your baseline view.



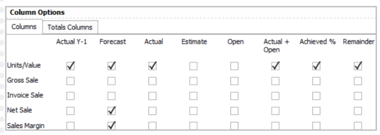
5 Define period

In Period define the view type. In the Current Month example, the view type is selected to be Current Month. But if you want to check a specific month, you can select User Defined and define the from and to dates. Lastly, choose whether the baseline should be displayed in months or weeks.



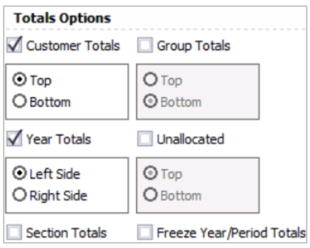
6 Choose columns

In Column options you can select between Columns and Total Columns. Check or uncheck the relevant columns in the working area and the total area to show or hide them in the baseline.



7 Choose totals

In Total Options choose the totals you want displayed in the baseline and where you want them displayed, on top or in the bottom of the tab.

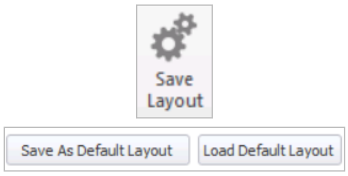


Effectmakers

8 Save your layout

When you are done setting up your layout, you need to save it.
You have different options for this.

1. Click Save Layout in ribbon to save and get back to the baseline view.
2. Click Save As Default Layout. This will save the layout for future users of the system.
3. Click Load Default Layout to overwrite the current layout.



Save layout with other users

1 Save layout

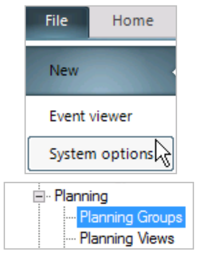
If you want to save the layout with other users, you do this in Security. Save the layout as default layout (check previous section) and go to File/Security/Users. Mark the user(s) and click Copy my settings to selected users to save the layout as their default layout.

Only administrators have access to this functionality.

Create planning groups

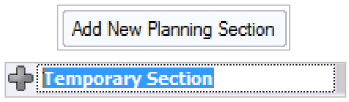
1 Create planning groups

To create a new planning group, click File and System options in the left menu.
In the list below Planning, click Planning Groups.



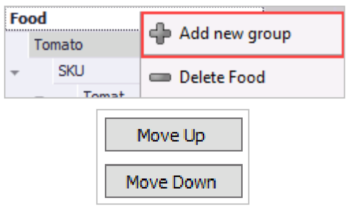
2 Add planning section

Add a planning section for your planning groups. Click Add New Planning Section and enter a name for the section.



3 Add planning group

The planning group is the level below the planning section. Right-click on the planning section and select Add new group.
When you have added more groups, you can click Move Up or Move Down in the right side of the window to move the groups around.
Click Delete name of the group to delete it.



4 Add planning level

Right-click the planning group and click Add new level to add a planning level to one group. Moving and deleting functions the same way as with groups.

5 Add planning mask

Right-click the planning level and click Add new mask.

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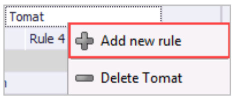
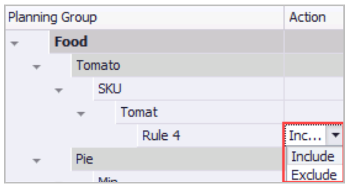
6 Add rule

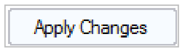
Now, define rules for the masks you have created.
Right-click the mask and select Add new rule.
In action, select whether the rule should be included or excluded. By including or excluding dimensions you define how detailed the rule will be.





7 Save changes

Click Apply Changes above the table when you are done adding and editing the planning hierarchy to save the changes.

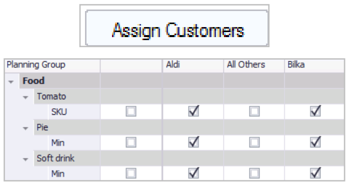


Show preview

You can see what products that matches the rules belonging to a mask, by clicking the mask and then click Show Preview in the bottom of the window.

8 Assign customers

Assign the customers to the planning section by clicking Assign Customers in upper right corner of the window.
Check the first box next to a planning level to choose all customers.

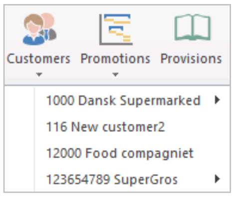


Listing filter

If the column Listing Filter is not in the table: Right-click and choose Field Chooser.
In Field Chooser: Find Listing Filter and pull this to the table headline in the table.
Right-click in the table/ Layout/Save to save the layout.

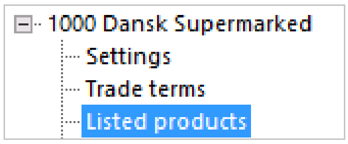
1 Open customer

Click Customers in ribbon and choose the customer.



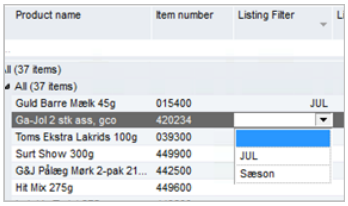
2 Listed products

In the table Listed products: Find the column: Listing Filter.



3 Add listing filter to product

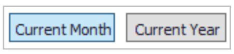
Choose the product that needs to be included in a season.
Click in the column Listing filter and choose the relevant season in the drop-down list.

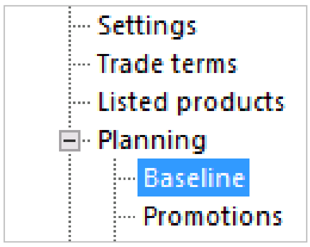


4 Go to Baseline

Click Baseline in the menu to the left of the screen.

Current Month is the default view:





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5 Define additional period

Decide for which period BMS should display the season.

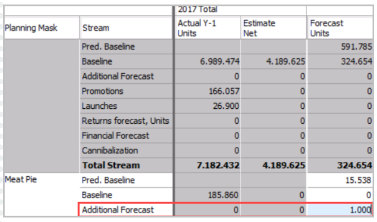
Enter start and end date. It will be possible to make a season forecast in the chosen period.

Close the window by clicking Save layout in the ribbon.

6 Enter additional forecast

Enter season forecast for every product in the given periods.

NB: Current Month is set up by system administrator with the relevant periods for the relevant season.



		2017 Total		
Planning Mask	Stream	Actual Y-1 Units	Estimate Net	Forecast Units
	Pred. Baseline			591.785
	Baseline	6.989.474	4.189.625	324.654
	Additional Forecast	0	0	0
	Promotions	166.057	0	0
	Launches	26.900	0	0
	Returns forecast, Units	0	0	0
	Financial Forecast	0	0	0
	Cannibalization	0	0	0
	Total Stream	**7.182.432**	**4.189.625**	**324.654**
Meat Pie	Pred. Baseline			15.538
	Baseline	185.860	0	0
	Additional Forecast	0	0	1.000

Section header here

In planning stream there are:

- Baseline
- Returns in units
- Additional forecast
- Sell out estimate

These streams can be added or removed from the baseline layout in Edit layout in the ribbon.

The streams are setup by a super user in System options.

Questions & Answers

Can I plan on SKUs?

Yes, set this up in system configuration.

How do I add a listing filter?

Go to Edit layout in Baseline and mark the listing filter you want in Listing filter. This will ensure that only those products with the chosen filter will be displayed in the baseline.

NB: This only functions if the planning mask is set on SKU level.