

# Setting up planning board

Planning boards in BMS are a multi-use tool for Baseline, Forecast, Actuals, Returns and Costs planning. An easy to build board that can be segmented by Customers and Planning Board Sections.

Planning boards are recommended and mend to be used and displayed per customer view. But when you define the board configuration structure it will be done in a holistic customer view of the planning board.

## Introduction

This Quick guide will show you how to setup a planning board.

## Quick guide concept

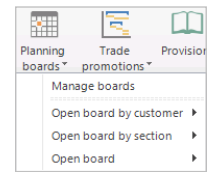
Through a number of easy steps you learn how to use the software.

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.

## Open a planning board

### 1 Open a planning board

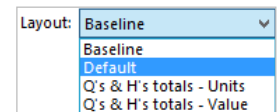
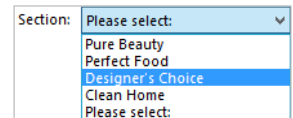
Open a planning board by Customer or by Section or bulk open it.



### 2 Define the Section and Layout

Choose an option from the Section drop-down list (if you have not already opened the board by Section) and select a layout for the board.

The board is ready to work with.



## Setup Board configuration

Board configuration is the mode where you create the structure and hierarchy of the Planning board. Here you add masks/products, rules, group level totals and grand totals.

The structure in this mode has to be precise in order to create a Planning board with correct calculations.

There are two different ways to build the board. One way is to add all the masks/products and after the group level totals and grand totals. The other way is to create it level by level. Meaning that you will add only the masks and group level totals that are under a specific group, and then the other group's masks and group level totals, and so on until you complete the board.

Both ways are recommended, as well as, import from EXCEL file is possible.

For this demonstration we will follow the first way.



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



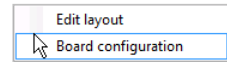
Tips and tricks are marked with an Info-icon.



Questions & Answers note relevant to the topic at hand.

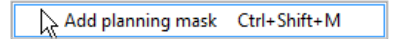
## 1 Open Board configuration

Click on the wrench icon and select Board configuration.



## 2 Create planning masks

Add the Planning masks in the board. One line for every product you include in your masks will be created following the setup of the mask while created.



Edit the product's mask if you want to add rules to include or exclude specific products or groups of products.

The board should look like the next picture.

Board configuration - Baseline 2018											
Section: Beauty & Health Board configuration - Baseline 2018											
Configuration											
Row no	Name	Row type	Tag	Sum of	Stream	Business alert	Product	Rules	Store	Customers	
1	Body-lotion Neutral PH	Input mask			Baseline		6002 Body-lotion Neutral PH			Carrefour, Lidl	
2	Body-lotion Rose	Input mask			Baseline		6000 Body-lotion Rose			Carrefour, Lidl	
3	Body-lotion Vanilla	Input mask			Baseline		6001 Body-lotion Vanilla			Carrefour, Lidl	
4	Body lotion target	Input mask			Target					Carrefour	
5	Shampoo Colored	Input mask			Baseline		1001 Shampoo Colored			Carrefour, Lidl, Tesco	
6	Shampoo Dry	Input mask			Baseline		1003 Shampoo Dry			Carrefour, Lidl, Tesco	
7	Shampoo Normal	Input mask			Baseline		1000 Shampoo Normal			Carrefour, Lidl, Tesco	
8	Shampoo Shiny	Input mask			Baseline		1002 Shampoo Shiny			Carrefour, Lidl, Tesco	
9	Shampoo target	Input mask			Target					Carrefour	
10	Shower Gel Baby Skin	Input mask			Baseline		4001 Shower Gel Baby Skin			Carrefour, Lidl, Tesco	
11	Shower Gel for Men	Input mask			Baseline		4002 Shower Gel for Men			Carrefour, Lidl, Tesco	
12	Shower Gel Normal	Input mask			Baseline		4000 Shower Gel Normal			Carrefour, Lidl, Tesco	
13	Shower gel target	Input mask			Target					Carrefour	
14	Body Cream Antiage	Input mask			Baseline		10004 Body Cream Antiage			Carrefour	
15	Body Cream Bed time	Input mask			Baseline		10009 Body Cream Bed time			Carrefour	
16	Body Cream Hydrating	Input mask			Baseline		10001 Body Cream Hydrating			Carrefour	
17	Body Cream Lifting	Input mask			Baseline		10005 Body Cream Lifting			Carrefour	
18	Body Cream Makeup 2in1	Input mask			Baseline		10003 Body Cream Makeup 2in1			Carrefour	
19	Body Cream Man	Input mask			Baseline		10006 Body Cream Man			Carrefour	
20	Body Cream Neutral PH	Input mask			Baseline		10002 Body Cream Neutral PH			Carrefour	
21	Body Cream No perfume	Input mask			Baseline		10008 Body Cream No perfume			Carrefour	
22	Body Cream Sensitive	Input mask			Baseline		10007 Body Cream Sensitive			Carrefour	
23	Body cream target	Input mask			Target					Carrefour	
24	Toothpaste Sensitive	Input mask			Baseline		5001 Toothpaste Sensitive			Carrefour	
25	Toothpaste Shiny White	Input mask			Baseline		5000 Toothpaste Shiny White			Carrefour	
26	Toothpaste target	Input mask			Target					Carrefour	

### 3 Add Group level totals

There are three Group Level totals you can add in the board. Level 1 (one) summarizes the Level 2 totals, Level 2 (two) summarizes the Level 1 totals, and, Level 3 (three) summarizes the Masks.

- Add group level 1
- Add group level 2
- Add group level 3

Mentionable is that, each Level summarizes all the lines, above or below it, till the line before finding a same Group Level total.

You can add as many Group Level Totals as you need to create the Hierarchy structure you want for your Planning board. Each Group Level should be represented with a specific color, defined from the Layout of the Planning Board. If not, edit the Layout to define the colors.

The board should look like the next picture.

Board configuration - Baseline 2018										
Section: Beauty & Health		Board configuration - Baseline 2018								
Configuration										
Row no	Name	Row type	Tag	Sum of	Stream	Business alert	Product	Rules	Store	Customers
1	Body-lotion Neutral PH	Input mask			Baseline		6002 Body-lotion Neutral PH			Carrefour, Lidl
2	Body-lotion Rose	Input mask			Baseline		6000 Body-lotion Rose			Carrefour, Lidl
3	Body-lotion Vanilla	Input mask			Baseline		6001 Body-lotion Vanilla			Carrefour, Lidl
4	Body lotion target	Input mask			Target					Carrefour
<b>5</b>	<b>Body Lotion</b>	<b>Group 3</b>		<b>2 to 5</b>						
6	Shampoo Colored	Input mask			Baseline		1001 Shampoo Colored			Carrefour, Lidl, Tesco
7	Shampoo Dry	Input mask			Baseline		1003 Shampoo Dry			Carrefour, Lidl, Tesco
8	Shampoo Normal	Input mask			Baseline		1000 Shampoo Normal			Carrefour, Lidl, Tesco
9	Shampoo Shiny	Input mask			Baseline		1002 Shampoo Shiny			Carrefour, Lidl, Tesco
10	Shampoo target	Input mask			Target					Carrefour
<b>11</b>	<b>Shampoo</b>	<b>Group 3</b>		<b>7 to 11</b>						
12	Shower Gel Baby Skin	Input mask			Baseline		4001 Shower Gel Baby Skin			Carrefour, Lidl, Tesco
13	Shower Gel for Men	Input mask			Baseline		4002 Shower Gel for Men			Carrefour, Lidl, Tesco
14	Shower Gel Normal	Input mask			Baseline		4000 Shower Gel Normal			Carrefour, Lidl, Tesco
15	Shower gel target	Input mask			Target					Carrefour
<b>16</b>	<b>Shower Gel</b>	<b>Group 3</b>		<b>13 to 16</b>						
<b>17</b>	<b>Bath &amp; After Care</b>	<b>Group 2</b>		<b>2 to 16</b>						
18	Body Cream Antiage	Input mask			Baseline		10004 Body Cream Antiage			Carrefour
19	Body Cream Bed time	Input mask			Baseline		10009 Body Cream Bed time			Carrefour
20	Body Cream Hydrating	Input mask			Baseline		10001 Body Cream Hydrating			Carrefour
21	Body Cream Lifting	Input mask			Baseline		10005 Body Cream Lifting			Carrefour
22	Body Cream Makeup 2in1	Input mask			Baseline		10003 Body Cream Makeup 2in1			Carrefour
23	Body Cream Man	Input mask			Baseline		10006 Body Cream Man			Carrefour
24	Body Cream Neutral PH	Input mask			Baseline		10002 Body Cream Neutral PH			Carrefour
25	Body Cream No perfume	Input mask			Baseline		10008 Body Cream No perfume			Carrefour
26	Body Cream Sensitive	Input mask			Baseline		10007 Body Cream Sensitive			Carrefour
27	Body cream target	Input mask			Target					Carrefour
<b>28</b>	<b>Body Cream</b>	<b>Group 3</b>		<b>19 to 28</b>						
<b>29</b>	<b>Beauty Care</b>	<b>Group 2</b>		<b>19 to 28</b>						
30	Toothpaste Sensitive	Input mask			Baseline		5001 Toothpaste Sensitive			Carrefour
31	Toothpaste Shiny White	Input mask			Baseline		5000 Toothpaste Shiny White			Carrefour
32	Toothpaste target	Input mask			Target					Carrefour
<b>33</b>	<b>Toothpaste</b>	<b>Group 3</b>		<b>31 to 33</b>						
<b>34</b>	<b>Dental Care</b>	<b>Group 2</b>		<b>31 to 33</b>						
<b>35</b>	<b>Pure Beauty</b>	<b>Group 1</b>		<b>2 to 33</b>						

#### 4 Add Grand totals

The Grand Total is the line where the summarize of the whole board is displayed.

You can add as many Grand Totals as you want, the displayed calculation will be always the same, no matter where it is placed. Grand Total should be represented with a specific color, defined from the Layout of the Planning Board. If not, edit the Layout to define the colors.

In our example we added two Grand Total lines, one on the first and one on the last line of the board.

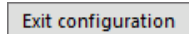
The previous board, now included the Grand total lines, should look like the next picture.



Board configuration - Baseline 2018										
Section: Beauty & Health		Board configuration - Baseline 2018								
Configuration										
Row no	Name	Row type	Tag	Sum of	Stream	Business alert	Product	Rules	Store	Customers
<b>1</b>	<b>Grand total</b>	<b>Grand total</b>		<b>2 to 33</b>						
2	Body-lotion Neutral PH	Input mask			Baseline		6002 Body-lotion Neutral PH			Carrefour, Lidl
3	Body-lotion Rose	Input mask			Baseline		6000 Body-lotion Rose			Carrefour, Lidl
4	Body-lotion Vanilla	Input mask			Baseline		6001 Body-lotion Vanilla			Carrefour, Lidl, Tesco
5	Body lotion target	Input mask			Target					Carrefour
<b>6</b>	<b>Body Lotion</b>	<b>Group 3</b>		<b>2 to 5</b>						
7	Shampoo Colored	Input mask			Baseline		1001 Shampoo Colored			Carrefour, Lidl, Tesco
8	Shampoo Dry	Input mask			Baseline		1003 Shampoo Dry			Carrefour, Lidl, Tesco
9	Shampoo Normal	Input mask			Baseline		1000 Shampoo Normal			Carrefour, Lidl, Tesco
10	Shampoo Shiny	Input mask			Baseline		1002 Shampoo Shiny			Carrefour, Lidl, Tesco
11	Shampoo target	Input mask			Target					Carrefour
<b>12</b>	<b>Shampoo</b>	<b>Group 3</b>		<b>7 to 11</b>						
13	Shower Gel Baby Skin	Input mask			Baseline		4001 Shower Gel Baby Skin			Carrefour, Lidl, Tesco
14	Shower Gel for Men	Input mask			Baseline		4002 Shower Gel for Men			Carrefour, Lidl, Tesco
15	Shower Gel Normal	Input mask			Baseline		4000 Shower Gel Normal			Carrefour, Lidl, Tesco
16	Shower gel target	Input mask			Target					Carrefour
<b>17</b>	<b>Shower Gel</b>	<b>Group 3</b>		<b>13 to 16</b>						
<b>18</b>	<b>Bath &amp; After Care</b>	<b>Group 2</b>		<b>2 to 16</b>						
19	Body Cream Antiage	Input mask			Baseline		10004 Body Cream Antiage			Carrefour
20	Body Cream Bed time	Input mask			Baseline		10009 Body Cream Bed time			Carrefour
21	Body Cream Hydrating	Input mask			Baseline		10001 Body Cream Hydrating			Carrefour
22	Body Cream Lifting	Input mask			Baseline		10005 Body Cream Lifting			Carrefour
23	Body Cream Makeup 2in1	Input mask			Baseline		10003 Body Cream Makeup 2in1			Carrefour
24	Body Cream Man	Input mask			Baseline		10006 Body Cream Man			Carrefour
25	Body Cream Neutral PH	Input mask			Baseline		10002 Body Cream Neutral PH			Carrefour
26	Body Cream No perfume	Input mask			Baseline		10008 Body Cream No perfume			Carrefour
27	Body Cream Sensitive	Input mask			Baseline		10007 Body Cream Sensitive			Carrefour
28	Body cream target	Input mask			Target					Carrefour
<b>29</b>	<b>Body Cream</b>	<b>Group 3</b>		<b>19 to 28</b>						
<b>30</b>	<b>Beauty Care</b>	<b>Group 2</b>		<b>19 to 28</b>						
31	Toothpaste Sensitive	Input mask			Baseline		5001 Toothpaste Sensitive			Carrefour
32	Toothpaste Shiny White	Input mask			Baseline		5000 Toothpaste Shiny White			Carrefour
33	Toothpaste target	Input mask			Target					Carrefour
<b>34</b>	<b>Toothpaste</b>	<b>Group 3</b>		<b>31 to 33</b>						
<b>35</b>	<b>Dental Care</b>	<b>Group 2</b>		<b>31 to 33</b>						
<b>36</b>	<b>Pure Beauty</b>	<b>Group 1</b>		<b>2 to 33</b>						
<b>37</b>	<b>Grand total</b>	<b>Grand total</b>		<b>2 to 33</b>						

#### 5 Exit Board configuration

When you are done with the configuration of the board, click on Exit configuration button to exit and save the setup.





# Quick guide for BMS

## The Board display

As long as you are done with the Board configuration, the board will have the final form of display. The Planning Masks, Group Levels and Grand Totals that have been setup will be allocated to provide all the details you want to display in the Planning Board.

The final display of the Planning board should be like the next picture.

Mask	1	2	3	4	5	6	7	8	9	10	11	12	Q4	TOTAL
	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast
Name	Units	Units	Units	Units	Units	Units	Units	Units	Units	Units	Units	Units	Units	Value
<b>Grand total - total</b>	<b>106,400</b>	<b>108,000</b>	<b>116,100</b>	<b>130,500</b>	<b>108,500</b>	<b>107,600</b>	<b>118,600</b>	<b>134,700</b>	<b>120,500</b>	<b>121,000</b>	<b>118,600</b>	<b>166,100</b>	<b>101,600</b>	<b>1,325,400</b>
Body lotion Herbal PH	5,500	5,500	6,500	10,500	5,500	5,500	7,000	10,000	7,000	7,000	7,000	21,000	5,000	4,500
Body lotion Rose	5,500	5,500	6,500	10,500	5,500	5,500	7,000	10,000	7,000	7,000	7,000	21,000	5,000	4,500
Body lotion Vanilla	5,500	5,500	6,500	10,500	5,500	5,500	7,000	10,000	7,000	7,000	7,000	21,000	5,000	4,500
Body lotion target	25,000	25,000	25,000	25,000	25,000	25,000	25,000	25,000	25,000	25,000	25,000	25,000	25,000	360,000
<b>Body Lotion - total</b>	<b>16,500</b>	<b>16,500</b>	<b>21,200</b>	<b>54,200</b>	<b>17,000</b>	<b>17,500</b>	<b>24,000</b>	<b>20,700</b>	<b>20,500</b>	<b>19,500</b>	<b>14,500</b>	<b>43,500</b>	<b>43,500</b>	<b>212,400</b>
Shampoo Colored	7,500	7,500	8,500	23,500	7,500	7,500	9,000	24,000	9,000	9,000	9,000	27,000	7,500	6,500
Shampoo Dry	7,500	7,500	8,500	23,500	7,500	7,500	9,000	24,000	9,000	9,000	9,000	27,000	7,500	6,500
Shampoo Normal	8,000	8,000	8,500	24,500	8,000	8,000	8,500	24,500	9,000	9,000	9,000	27,000	7,500	7,500
Shampoo Shiny	7,500	7,500	8,500	23,500	7,500	7,500	9,000	24,000	9,000	9,000	9,000	27,000	7,500	6,500
Shampoo target	35,000	35,000	35,000	35,000	35,000	35,000	35,000	35,000	35,000	35,000	35,000	35,000	35,000	450,000
<b>Shampoo - total</b>	<b>30,500</b>	<b>30,500</b>	<b>34,000</b>	<b>95,000</b>	<b>32,000</b>	<b>30,500</b>	<b>36,000</b>	<b>34,500</b>	<b>35,000</b>	<b>34,500</b>	<b>34,500</b>	<b>104,200</b>	<b>27,000</b>	<b>27,000</b>
Shower Gel Baby Skin	8,000	8,500	8,500	25,000	8,000	8,000	8,500	24,500	8,500	8,500	8,500	25,000	7,500	8,000
Shower Gel For Men	8,000	8,500	8,500	25,000	8,000	8,000	8,500	24,500	8,500	8,500	8,500	25,000	7,500	7,500
Shower Gel Normal	9,000	9,500	9,500	28,000	9,000	9,000	10,000	28,000	10,000	10,000	10,000	29,000	8,500	8,500
Shower gel target	30,000	30,000	30,000	30,000	30,000	30,000	30,000	30,000	30,000	30,000	30,000	30,000	30,000	360,000
<b>Shower Gel - total</b>	<b>25,000</b>	<b>26,500</b>	<b>26,500</b>	<b>78,000</b>	<b>25,000</b>	<b>25,000</b>	<b>27,000</b>	<b>77,000</b>	<b>27,000</b>	<b>26,500</b>	<b>26,500</b>	<b>79,500</b>	<b>23,000</b>	<b>23,000</b>
<b>Bath &amp; After Care - total</b>	<b>72,000</b>	<b>73,500</b>	<b>81,700</b>	<b>227,200</b>	<b>74,000</b>	<b>73,600</b>	<b>80,600</b>	<b>227,000</b>	<b>82,200</b>	<b>82,200</b>	<b>80,500</b>	<b>245,400</b>	<b>67,500</b>	<b>64,000</b>
Body Cream Aftershave	2,300	2,400	2,300	7,000	2,300	2,300	3,000	9,600	3,000	3,000	3,000	9,000	2,300	2,300
Body Cream Red line	3,000	3,000	3,000	9,000	3,000	3,000	3,500	9,500	3,500	3,500	3,500	10,500	3,000	3,000
Body Cream Hydrating	2,300	2,300	2,300	6,900	2,300	2,300	2,800	7,400	2,800	2,800	2,800	8,400	2,300	2,300
Body Cream Lifting	3,000	3,000	3,000	9,000	3,000	3,000	3,500	9,500	3,500	3,500	3,500	10,500	3,000	3,000
Body Cream Makeup 2in1	4,500	4,500	4,500	13,500	4,500	4,500	5,000	14,000	5,000	5,000	5,000	15,000	4,500	4,500
Body Cream Men	1,500	1,500	1,500	4,500	1,500	1,500	1,800	4,800	1,800	1,800	1,800	5,400	1,500	1,500
Body Cream Herbal PH	3,000	3,000	3,000	9,000	3,000	3,000	3,400	9,400	3,400	3,400	3,400	10,200	3,000	3,000
Body Cream No perfume	2,500	2,500	2,500	7,500	2,500	2,500	3,000	8,000	3,000	3,000	3,000	9,000	2,500	2,500
Body Cream Sensitive	2,300	2,300	2,300	6,900	2,300	2,300	2,800	7,800	2,800	2,800	2,800	8,400	2,300	2,300
Body cream target	30,000	30,000	30,000	30,000	30,000	30,000	30,000	30,000	30,000	30,000	30,000	30,000	30,000	360,000
<b>Body Cream - total</b>	<b>24,400</b>	<b>24,500</b>	<b>24,400</b>	<b>73,300</b>	<b>24,500</b>	<b>24,600</b>	<b>28,600</b>	<b>77,700</b>	<b>28,300</b>	<b>28,100</b>	<b>28,100</b>	<b>84,700</b>	<b>24,100</b>	<b>24,400</b>
<b>Beauty Care - total</b>	<b>24,400</b>	<b>24,500</b>	<b>24,400</b>	<b>73,300</b>	<b>24,500</b>	<b>24,600</b>	<b>28,600</b>	<b>77,700</b>	<b>28,300</b>	<b>28,100</b>	<b>28,100</b>	<b>84,700</b>	<b>24,100</b>	<b>24,400</b>
<b>Pure Beauty - % of grand total</b>	<b>100.00%</b>	<b>100.00%</b>	<b>100.00%</b>	<b>100.00%</b>	<b>100.00%</b>	<b>100.00%</b>	<b>100.00%</b>	<b>100.00%</b>	<b>100.00%</b>	<b>100.00%</b>	<b>100.00%</b>	<b>100.00%</b>	<b>100.00%</b>	<b>100.00%</b>
<b>Grand total - total</b>	<b>106,400</b>	<b>108,000</b>	<b>116,100</b>	<b>130,500</b>	<b>108,500</b>	<b>107,600</b>	<b>118,600</b>	<b>134,700</b>	<b>120,500</b>	<b>121,000</b>	<b>118,600</b>	<b>166,100</b>	<b>101,600</b>	<b>1,325,400</b>
<b>Grand total - accumulated</b>	<b>106,400</b>	<b>214,400</b>	<b>330,500</b>	<b>330,500</b>	<b>439,000</b>	<b>546,600</b>	<b>665,200</b>	<b>665,200</b>	<b>785,700</b>	<b>906,700</b>	<b>1,025,300</b>	<b>1,025,300</b>	<b>1,126,900</b>	<b>1,225,300</b>

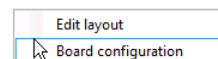
## Delete masks, level totals & grand totals

You can delete the level totals and the grand totals anytime you want. But, to delete a mask you need to make sure that the line has no data. This setup is to secure that you will not accidentally delete important data from the system.

To delete a mask, first delete all the numbers of that mask line on the planning board.

### 1 Open Board configuration

Click on the wrench icon and select Board configuration.



### 2 Select line(s) for delete

Select the line(s) you want to delete and right click and select Delete.

A window will ask you to confirm this action.

21	Body Cream Hydrating	Input mask
22	Body Cream Lifting	Input mask
23	Body Cream Makeup 2in1	Input mask
24	Body Cream Man	Input mask

