EFFECTMAKERS BMS

INTRODUCTION

GUIDED TOUR THROUGH THE BMS DEMO SYSTEM

Effectmakers

VERSION 17.8

Welcome to the BMS Introduction

What is BMS?

BMS is a business planning and trade promotion management solution for companies across many industries. We focus on delivering a simple and user-friendly, yet very powerful solution. It provides all the functionality your organization need for business planning and trade promotion management.

The software is highly configurable and can be integrated with all ERP systems. We are using Microsoft Azure for a cloud solution, but if your organization's policy does not allow cloud based solutions you can get BMS on premise.

Who are we?

Effectmakers is a software vendor dedicated to business planning and trade promotion management. We work closely with our clients to continuously improve the software so they can optimize their business.

What is BMS Introduction?

This introduction guide will introduce you to some of the system's key features. Use the guide alongside with your BMS demo system and navigate around in the system while reading.

If you have not signed up yet, please go to www.effectmakers.com and complete the signup. The first 2 months is free and without any further commitment.

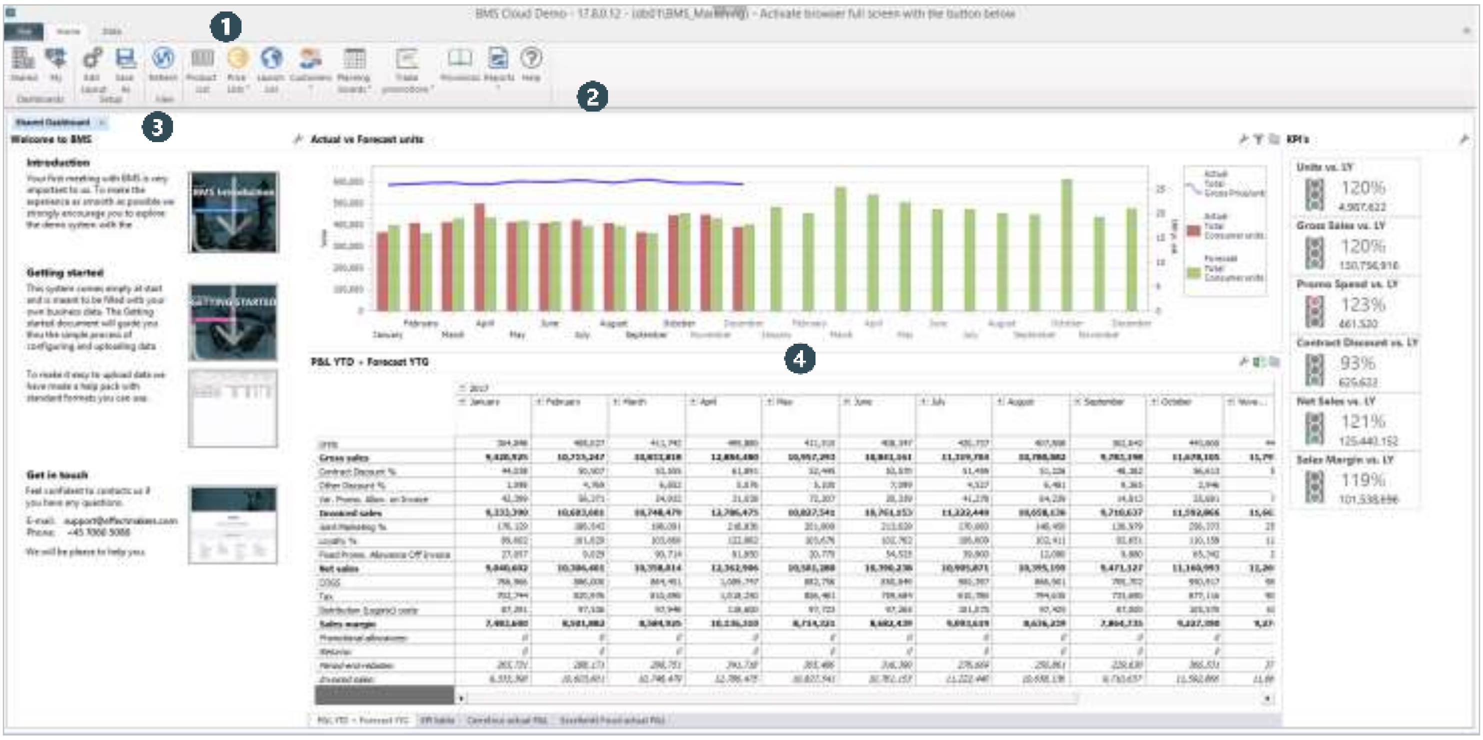
Do not hesitate to contact us for any questions at
support@effectmakers.com
We will be happy to help you!

Getting started

This part will cover the general layout of the application and how the navigations works.

Log into the system and click around the described items

You should now see the following window:



1 **The Ribbon** provides access to all the functionality for both configuration and for the daily use.

"Home" is the most important and will be the one you will use mostly in the demo. From here you have access to both your master data, customers and planning areas.

"File" let's you close the application (which eventually also is important) and gives you access to areas like Security settings and system configuration.

"Data" provides access to a number of system tasks which and this is not part of the guided tour, but maye become relevant depending on how you end up implementing your solution.

2 **The ribbon changes** according to the selected tab. In the example above, the left part of "Home" shows tools for managing the Shared Dashboard. If you open the product lists, it will show the product related functions and so on.

3 **In the left part** you have easy access to this document and the Getting started guide. So you can always find your way back. Also there is a quicklink to downloading a simple package of Excel templates you can use for preparing master data and uploading into your own system.

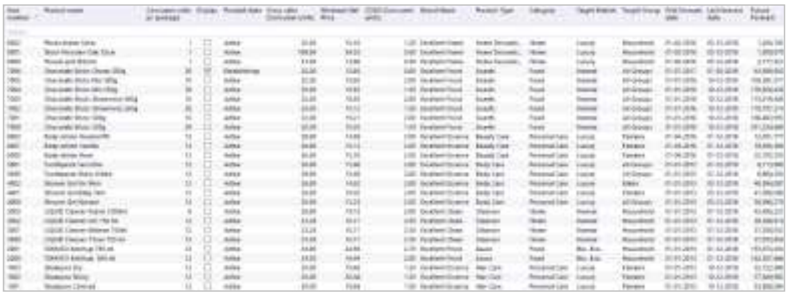
4 **The working area** always shows the Shared Dashboard on startup. When you access the other parts of the system, the working area will keep the Shared Dashboard open in it's own Tab behind the new window you opened.

Product list

A functional overview of your products.

The product list gives an overview of all your products and the relevant product data. It is highly flexible and can be easily configured to show the preferred columns. The window can also be used to import/export the product list and filter the view.

*From the ribbon click on the **Product list.***



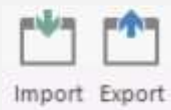
The functions relevant to the Product list are located in the top ribbon.

1 **A functional overview**. The window gives a fast and substantial overview of your basic product data. Click on a column name to filter your product list by the choses parameter.

- Item number
- Product name
- Consumer units per package
- Display
- Product state
- Gross sales
- Prices
- Brand name
- And many more

Right-click and choose Field Chooser to add more columns. Note that the previously deleted columns will appear here. This way the product list is a highly configurable window.

2 **Import and export** your product list by using the respective buttons in the top ribbon.



Apart from manual entry, a majority of master data in BMS can be added using automatic interfaces and importing from Excel. The Import/Export functionality here refers to Excel importing and exporting. The use of this function is described in the Getting Started guide and in one of our Quick-guides. The automatic interfaces are available upon purchasing BMS.

3 **Edit mode** gives you an opportunity to edit a subset the product master data directly in the product list.

Find the Edit part of the top ribbon and enable the Edit mode. Now you can edit the data concerning your products by clicking on the fields you want to change.

4 The list always shows the active products, but you can **Show hidden** and **inactive** products also.

These options can help you display and track products that are not active the particular time in the system, meaning that they might be "retired", not yet active, dummy, etc.

Product master data

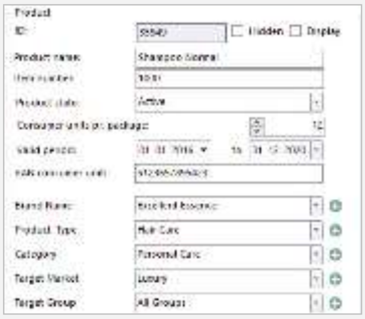
Correctly maintained product data is a foundation for your planning.

BMS can easily work with various ERP solutions in order to keep your product list updated. However, there is also a manual import/export function available. In the following we show how to configure your products and maintain them manually in BMS.

*From the ribbon click on the **Product list** button and open a product by double clicking.*

On the left side you will see a navigation tree. Click on the nodes and follow the number to read about each topic.

1 **In Master data and Properties**, product name, product number, product hierarchy, as well as, various product details can be defined.

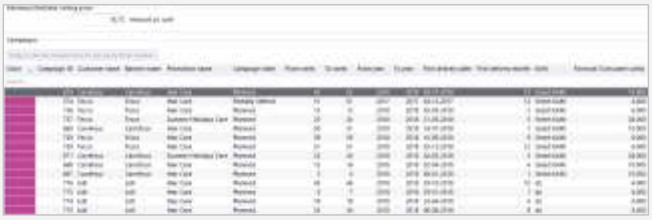


It is possible to add various details for your products. This will help you create even more detailed planning, thus, it will make the use of the application even more valuable. A well defined product hierarchy, name, item number, EAN code, valid period, product state, will provide the needed information for better planning and assignments of the product. On the other hand, information of consumer units per box/pallet etc, can provide the flexibility for the different ways of planning.

2 Defining **Listings** will give an overview of where the product is listed, the state and it will define the listing price for every customer.

Listings give you an overview of in which customers your products are listed. You can see the price for every customer, and the different listing states it has as well.
Listings can easily be edited by right-clicking or by clicking on the Edit icon on the ribbon. For top-level customers with banners, you can also choose to list the product on banners.

3 **Promotions** give you an overview of which promotions are created for the specific product.



Promotions display several details about all promotions including the product. You can for instance see which customers the promotions are set to, the promotion week and much more.
You can set the minimum selling price in the top of the window to make a general minimum promotion price.
In this promotion window you can see what promotions collapse with each other, so you can be prepared for this.
This window will by default show all current still running and future promotions. If you also want to see fully settled or ended promotions, here it can be done by checking the corresponding selection on the ribbon. Also, in this mode you can check the selection on the ribbon to get a preview of a specific promotion.

4 To get an overview of all the figures concerning the product, you can enter **Gross price**, **Tax** and **Cost**.

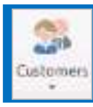
It is possible to enter your gross prices, taxes, and costs in different sections and keep better control of them.
In Gross Price tab you can add retail price to add a standard retail price per product, as well as, you can add a minimum net price per product.
The lists in Tax tab shows you what taxes the product contains. You can add or delete taxes as you prefer.
Cost tab displays what costs are related to the product. Here you can add a distribution cost, and you can add or delete costs as you want just like with taxes.

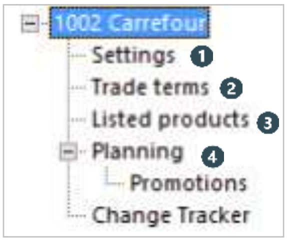
Customers

All the planning you do will be with the focus on your customers.

The customer area of BMS gives you easy access to planning, listings, trade terms, master data and default settings. After you click the customer name in the menu, a new tab will open. The window shows a simple overview of the planned units and actuals of the specific customer you opened.

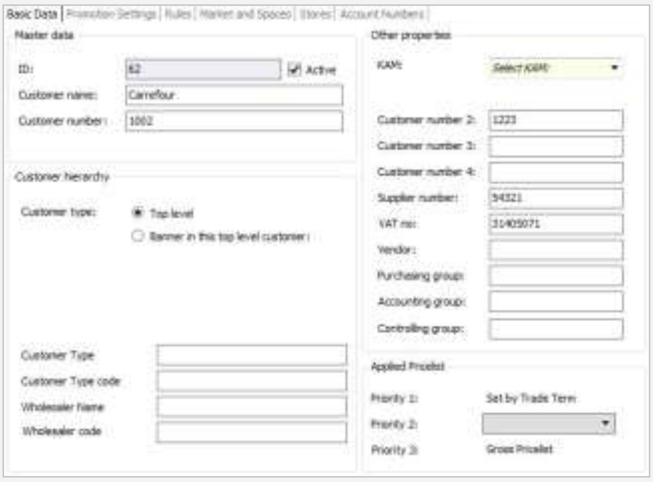
*From the ribbon click on the **Customers** button and select any customer.*





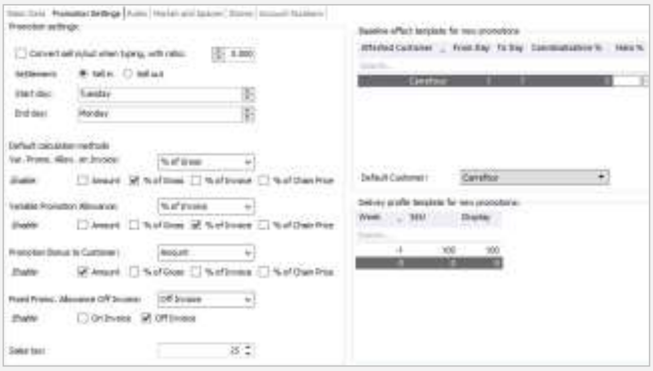
On the left side you will see a navigation tree. Click on the nodes and follow the number to read about each topic.

1a **In Settings**, **Master data,** like name, number & customer hierarchy is defined once when you create the customer.



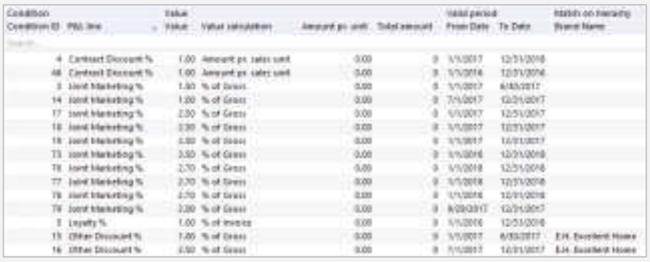
Customers can be defined as independent customers or as indirect customers belonging under one umbrella. Planning can be done on both levels - you can plan baseline on the top level and trade promotions on indirect customers. Each customer has numerous different configurable and fixed fields, like groups, customer numbers, accounting group, that can be used for settings up reporting and integration.

1b Defining **Promotion Settings** for delivery, baseline effect and allowances will make it faster to create new promotions.



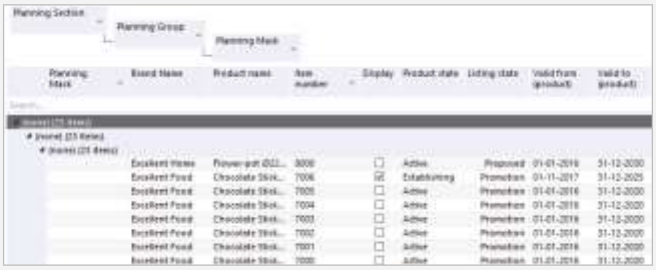
Sell in/out settlements can be defined in Promotion Settings of each customer. Furthermore, you can define some default calculation methods for promotion allowances, as well as, setup baseline effects for the customer and define a delivery profile for the promotions.

2 In the **trade term** tab you define discount rates you assign to specific customers, and your P&L will be defined globally in your system.



Here you create conditions/trade terms, that correspond to the specific customer. The conditions cannot be applied for more than one top level customer at a time, but can be applied for the indirect customers under his umbrella. Conditions can be assigned from a holistic customer level down to SKU level from the match to hierarchy fields.

3 **Listings** make it easy to maintain the authorized product list for each customer.



Listings can be defined with listing states, workflows, listing dates and listings filters. It is easy to list products to customers and listings can help you for a faster creation of promotions. For top level customers that have indirect customers under their umbrella, when define listing on the top level you can choose if the listed product will de listed also or not to the indirect customers.

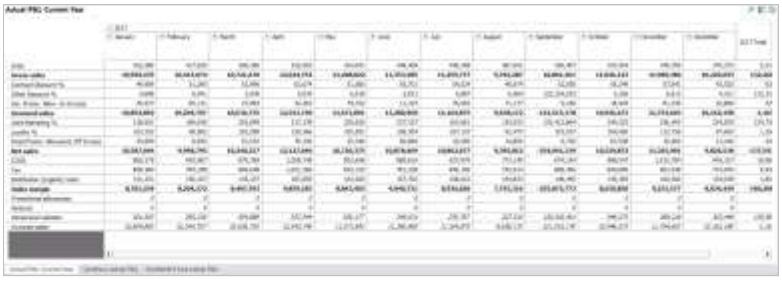
4 From the customer navigations tree you have short cuts directly to the **trade promotion** module and the **planning boards**. These we will describe later in the Introduction guide.

Your profits & losses

With our P&L calculations you will always be up to date with your finances.

The P&L in BMS is a highly accurate tool that interconnects and joins the system to one solution. It can be used as for reporting and as a planning companion. A well functioning P&L is connected to the trade terms and represents a company's financial processes. This ensures the calculations to be accurate and providing fast insights.

*Go to **Shared Dashboard** and turn your attention to the P&L reports available.*



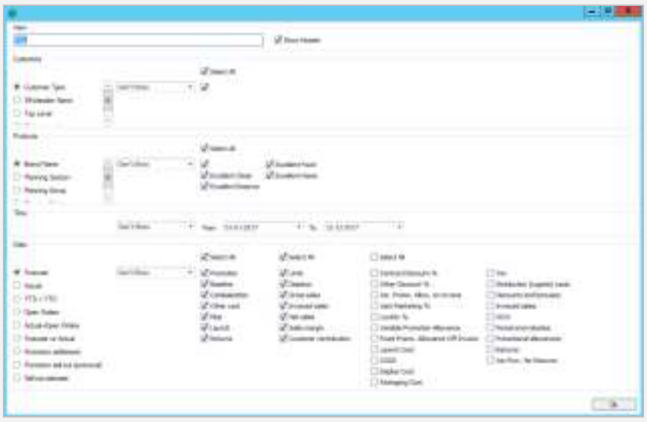
In the bottom of the P&L window you will see three tabs to navigate between different P&L reports.

1 **The structure of the P&L** is defined in the system options and is very flexible.

	2017			
	January			
	Carrefour	Lidl	Tesco	January Total
	Actual	Actual	Actual	
Units	202,890	93,084	126,306	422,280
Gross sales	**5,031,648**	**2,402,567**	**3,516,220**	**10,950,435**
Contract Discount %	17,318	8,394	24,197	49,909
Other Discount %	0	0	4,698	4,698
Var. Promo. Allow. on Invoice	36,728	2,349	1,860	40,937
Invoiced sales	**4,977,602**	**2,391,825**	**3,485,466**	**10,854,892**
Joint Marketing %	129,206	41,695	47,700	218,601
Loyalty %	47,699	22,878	32,775	103,352
Fixed Promo. Allowance Off Invoice	18,750	3,395	3,750	25,895
Net sales	**4,781,947**	**2,323,856**	**3,401,241**	**10,507,044**
COGS	391,330	198,877	276,068	866,275
Tax	338,370	194,964	274,950	808,284
Distribution (Logistic) costs	78,610	22,291	30,350	131,251
Sales margin	**3,973,636**	**1,907,724**	**2,819,873**	**8,701,234**
Promotional allowances:	*0*	*0*	*0*	*0*
Returns:	*0*	*0*	*0*	*0*
Period-end rebates:	*176,905*	*64,577*	*80,475*	*321,953*
Invoiced sales:	*4,977,602*	*2,391,825*	*3,485,466*	*10,854,892*

The P&L lines correspond to trade terms are set up to calculate Gross sales, Invoiced sales, Net sales and Sales Margin. The calculation of the P&L lines is very flexible and can be calculated in any way fits business and the user.

2 **Automatic P&L reports** can be generated and added to your dashboard.



In Shared Dashboards, click on Layout and add a P&L element. The next window will present you with many different options to choose from.

The P&L is an important and central part of our software and therefore will be touched upon on various occasions throughout the document. P&L is useful in promotion planning, launch planning, reporting, dashboards, settlements, business targets and many more.

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Trade promotion calendar

Trade promotion calendar helps you to get an overview of your promotions.

The promotion calendar contains a graphical overview of all promotions in BMS. You can scroll back and forth in the calendar to be able to see promotions in different time periods.

*From the ribbon click on the Trade promotions button and open the calendar by clicking **Promotion calendar**.*

Most of the navigation takes place in the main field of the promotion calendar as you see a screenshot of to the right. Click on the nodes and follow the number to read about each topic.

1 The **Calendar** allows you to see all promotions.

In the calendar overview, you can see the calendar setup being divided into months, weeks, and days.
The small colored square is the promotion profit indicator. This changes color depending on the promotion profit. The promotions expand graphically through the time period they are valid within. In this way it is easier for you to see for how long your promotions vary.
You can change the names of the promotions by clicking on the current promotion name. The promotions are colocoded by brand, which can be helpful if you want to see what brands you have promotions for.

2 Calendar **overview** lets you copy promotions directly in the calendar, and you can easily move promotions.

With the calendar overview you can easily copy promotions within the calendar. This is helpful if you want to copy promotions fast without entering the same information more times and without exporting to an Excel file to import again later.
You can copy all customers to next year of the calendar.
Another function is the drag-and-drop functionality. This allows you to "grap" one promotion and drag it to wherever you want to paste it in the calendar. This lets you move promotions to new dates in few seconds.

3 You can easily check for **conflicts** in the promotion calendar by filtering the promotions.

It is fast to check for collisions in the promotion calendar. Filter on customers and brand and then you can see if there are any promotions with the same product setup to competing stores.

4 **Preview** lets you see important information about the promotion.

Activate the preview feature to display a small section with details about the promotion directly in the promotion calendar. You can also double-click a promotion to open the promotion in a new tab.

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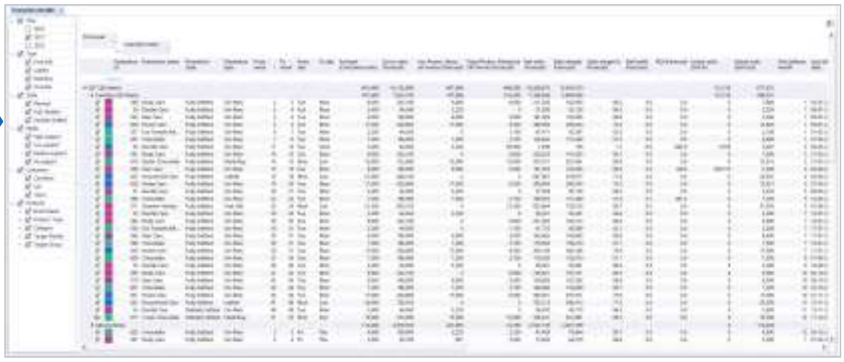
Promotion list

Promotion list provides a listed overview of your promotions.

The promotion list is organized the way you get a listed view of your promotions. You can filter the promotions as with the promotion calendar, but you can also filter different KPIs in the actual list.

*From the ribbon click on the Trade promotions button and open the **Promotion list** by clicking on it.*



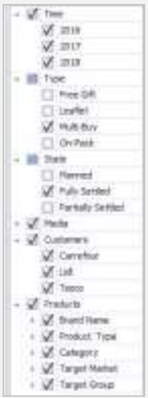
Most navigation takes place in the main field of the promotion list. Click on the nodes and follow the number to read about each topic.

1 In Promotion list module you can monitor and track the **flow** of the promotions.

	Promotion ID	Promotion name	Promotion state	Promotion type	From week	To week	From day	To day	Forecast (Consumer units)	Gross sales (Forecast)	Var. Promo. Allow. on invoice (Forecast)	Fixed Promo. Allowance Off invoice (Forecast)	Net sales (Forecast)	Sales margin (Forecast)	Sales margin % (Forecast)
	631	Home Care	Fully Settled	On-Pack	45	46	Tue	Mon	17,000	428,860	17,000	8,500	384,561	291,811	75.9
	632	Household Care	Fully Settled	Leaflet	47	48	Mon	Sun	29,000	738,010	0	0	705,313	546,413	77.5
	34	Dental Care	Partially Settled	On-Pack	48	49	Tue	Mon	2,400	64,560	3,228	0	56,970	48,170	86.3
	617	X-mas Chocolate	Partially Settled	Multi-Buy	51	52	Mon	Sun	15,000	372,000	15,000	15,000	326,231	261,881	80.3

Identify and control promotions by Promotion states. You can assign promotion states depending on how far your promotions are in their lifecycle. Such states can be: settled, planned, agreed, cancelled, evaluated and many more. The states can be configured as well.

2 Listing specific promotions based on specific criteria from the **filter** options on the left of the promotion list window.

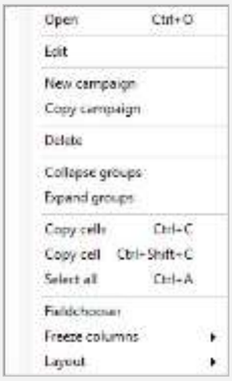


It easy to click and select the filters you want to apply for your list. You can monitor promotions for over/under performance of Actual sales, Net sales, Sales margin, Gross sales, ROI, Promotion discounts, and much more. Moreover, filter per customer, year, key account manager, delivery time, past/future/current period promotions, etc.
The example above shows a filtered list of all the multi-buy promotions for the previous and current year, sorted by promotion week and by sales margin from low to high.

Moreover, you can easily list promotion by state, like planned, approved, fully settled etc.

It is possible to set up different equations to your column filters to create an ever more specifically detailed list of promotions. All can be set up by a simple click.

3 **Manage** and **maintain** one or more promotions by one click.



Manage fully the promotions; create new, copy existing, bulk & mass edit (with “Edit” button from ribbon), adjust promotion days, delivery and baseline effect. With these options you can maintain your own list display by choosing the column fields from the “Fieldchooser” and then save the layout from the layout options.

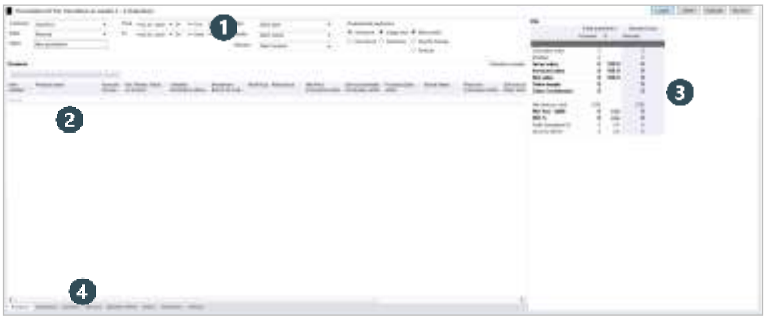
There is a big variety of options of maintenance in the promotion list module that can help you create the best most corresponding to your business list for a confident and optimal use.

Creating a promotion

Creating a promotion in BMS is fast and easy.

The promotion window is well organized to give you a functional overview, live P&L and a design that lets you create a promotion in a few clicks.

*From the ribbon click on **File** button and create a new **promotion.***

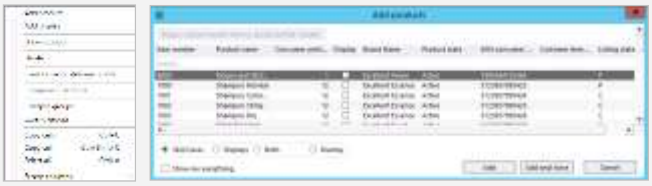


Most navigation takes place in the main field of the promotion list. Click on the nodes and follow the number to read about each topic.

1 **Promotion header** is the first thing you need to define. Here you enter the basic info and decide the promotion mechanics.

In the promotion header it is mandatory to define the customer, state, name and valid dates of the promotion. Secondary, you can select type and purpose of your promotion. The media of a promotion refers to the way you get the promotion awareness. Promotional mechanics are definitive elements of a promotion and mandatory as well. The promotional mechanics will serve as a great aid in the evaluation process of your promotions.

2 **Adding products & displays** is a fundamental step. Once you have chosen a customer for your promotion you can add the listed products & displays to the promotion.



Right-click in the products area will give you a menu where you can manage the products. Click on Add products to select products for your promotion. The adding window has several filtering options that can be used to access the right products faster.

3 **Live P&L** is your true companion through the whole planning process. The P&L will calculate your financial values instantly after any change in your planning.

The P&L is intended to show a full picture of your finances, when you create and plan a promotion. The P&L lines and calculation methods are fully configurable to accommodate your business.

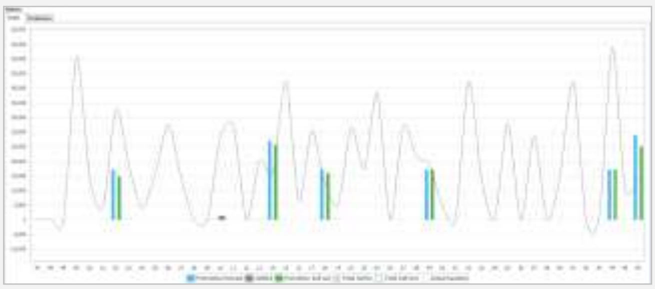
4a **Input forecast & Allowance** are the quantitative planning part of your promotion.

Once you added the products you want to have in your promotion, it is time to forecast the values. Once added, each product will get several planning columns such as Forecast (Consumer units)/(Sales units), Variable promotion allowance on/off invoice and more. These columns are configurable to accommodate your planning routines.
The fixed promotion allowance can be managed from the Allowance tab in the bottom part of the window.

4b **Delivery profile** is also one of the important aspects of promotion planning. This process is fast, easy and intuitive using BMS.

Access the Delivery tab in the bottom of the promotion window to edit the delivery profile.

4c Recall the **history** of previous sales. A part of the future performance can be anticipated from the history of the product's sales.



Access the History tab to explore the history of sales concerning the products you chose for your promotion.

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Promotion lifecycle

BMS supports managing of the full promotion lifecycle.

The promotion window in BMS is design to support a promotion from the early planning stages to settlement and evaluation. These processes are configurable, as is the rest of the window to accommodate each unique business.

*Go to **Promotion list/calendar** and open a promotion.*

Navigate between the relevant tabs in the bottom of the promotion window or in the top-right corner.

1. BMS offers **Execution support** for your promotions through automatic promotion letters and by providing history of sales.

You can create and design the letters as you see fit. They are initially created in Excel and thereby can be adjusted every time you use them.

3. Go to Evaluate part of the promotion window to do **Post-evaluation** and **sell out** analysis. The actual sell out data can be entered manually, imported or through custom interfaces with various ERP systems.

Analyse the your initial forecast, actual sell out and evaluated values. As through the whole process, our flexible P&L is there to assist you in your finance calculations.

2. Once the promotion is executed, it is time to **settle** the financial aspects. By default it can be done by going to the settle part of the promotion window.

Click on Settle in the top-right corner of the window and settle your promotion by adding fixed and variable allowance settlements.

4. Make **Evaluation notes** to save your learnings and improve the performance of future promotions.

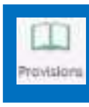
To improve the future performance of your promotions, you can use Evaluation notes, the history of performance or predictions made by BMS.

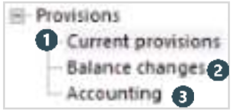
Provisions

Provisions module keeps track of your debt.

BMS automatically calculates provisions for the variable and fixed promotion allowances on your promotions. The provisions can easily be exported and integrated into your ERP system.

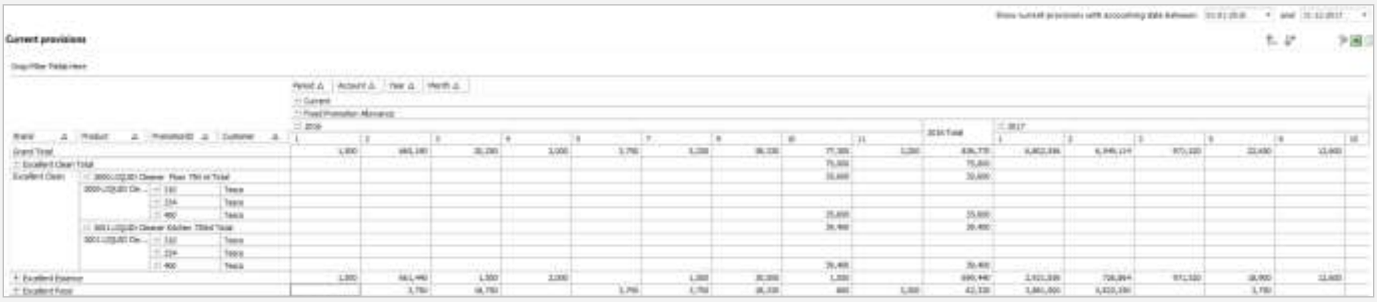
*Click on **Provisions** in the top ribbon to enter the provisions module.*





The tree menu has three choices of functionality connected to provisions. The possibilities each represent different routines of working with debt and provisions.

1 **Current provisions** is a part, where you can segment and analyse the total current provisions in details. The functionality makes you able to track down your debt.



Using this window, you can find old unsettled promotions. There are various filtering options by periods and different columns. Furthermore you can export the results as an Excel file.

2 **Balance changes** allows you to track changes in your debt by periods.

This part of the provisions lets you track the changes in your debt in detail. You can identify where and when the financial values change in connection to your fixed and variable allowances.

3 Using **Accounting,** you close the month ending by simply clicking a button. BMS creates a frozen picture of the provisions on that exact time you choose. From here you can download a csv file for manual upload into your ERP and booking systems.

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Planning boards

Plan Baseline & Forecast, Launches, Returns and Promotion offerings.

Planning boards make planning in BMS easier and more flexible as they let you create several highly configurable planning windows in your system. By using this tool you can plan on different levels of input, periods and be in control of every aspect of the planning.

From the ribbon click on the ***Planning boards*** *button and open a product a board or select Manage boards and double-click on a board to open.*

The Planning board will open, follow the numbers to read about each part.

1 Planning board **Structure** is fully configurable to fit any specialized structure and make the planning easy.

Mask		2017									
		1		2		3		Q1			
		Actual		Actual		Actual		Actual		Forecast	
Name	Stream	Units	Invoiced sales	Units	Invoiced sales	Units	Invoiced sales	Units	Invoiced sales	Units	Invoiced sales
Grand total - total		**101.646**	**2.247.020**	**84.105**	**1.762.912**	**95.198**	**2.089.076**	**280.949**	**6.099.008**	**240.000**	**4.942.650**
Body-lotion Neutral PH	Baseline	4.905	124.307	4.815	129.149	4.680	130.359	14.400	383.814	13.500	357.525
Body-lotion Rose	Baseline	4.680	124.307	4.815	121.886	4.590	125.517	14.085	371.709	13.500	357.525
Body-lotion Vanilla	Baseline	4.160	110.495	4.160	113.723	4.360	109.419	12.680	333.636	12.000	317.800
Body Lotion - total		**13.745**	**359.108**	**13.790**	**364.757**	**13.630**	**365.295**	**41.165**	**1.089.159**	**39.000**	**1.032.850**

Through the mode of *Board configuration* and *Edit layout* it is possible to configure a structure with headers, masks, totals groups and columns. The planning periods can be per month and you can add on totals per quarters, halves and year total.

2 **Baseline forecasting** can be planned easily by customer and maintained for the best practice.

Mask		2018			
		1	2	3	Q1
		Forecast	Forecast	Forecast	Forecast
Name	Stream	Units	Units	Units	Units
Grand total - total		**106.400**	**108.000**	**116.100**	**330.500**
Body-lotion Neutral PH	Baseline	5.500	5.500	6.500	17.500
Body-lotion Rose	Baseline	5.500	5.500	6.500	17.500
Body-lotion Vanilla	Baseline	5.500	5.500	8.200	19.200
Body lotion target	Target	20.000	20.000	25.000	
Body Lotion - total		**16.500**	**16.500**	**21.200**	**54.200**

Baseline planning can be forecasted easily by copying the previous years board and adjust. It is possible to add on targets and build board KPIs to track on the year's total columns. Also it is possible to plan in both Units and Value, depending on your company's ways.

3 **Layouts** can be edited to reflect your business structure of the board.

From the edit layout mode you have various selections to define your own structure fitting better for your business, as well as, define the detailed information you want to display on the board and colour differentiations for specific lines and columns. All the selections are aligned with your system's setup (P&L, terminology).

4 **Configuring the board** can be done easily by defining the structure of planning masks, group totals and grand totals.

It is easy to configure the structure of the board by adding planning masks in groups of your preference , adding three different group level totals to manage the totals of your groups and adding grand totals to have the overview of the column totals. Moreover, it is easy to maintain rules, the stream type of the masks, include/exclude customers with the mask and add tags for the masks. Everything is easy to move around and edit the structure to the best fit of your business.

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Launches

Launches can be managed easily and with transparency.

BMS Launch module is a powerful tool that provides you with an easy and transparent managing of your launches. The software defines a launch as the first six months of a product life cycle. By using the module you will be fully in charge of delivery, forecast, predictions and dates. Moreover, the value of forecasted units is calculated simultaneously in correspondence with trade terms defined on the customers.

*From the ribbon click on the **Launch list** button and open a product launch by double clicking.*

Launch List

A new window will open, follow the numbers to read about each part.

1 The **Launch header** defines the basic information to identify the launch, like launch ID, name and description.

Launch

Launch ID: 25 Name: Chocolate new flavor Description: New flavor, cherry, chocolate

Similar to the way of identifying the promotions in BMS, this is the same for identifying the different launches running at the same time in your system.

2 The **Value** calculations is a P&L insight of the launch.

Value

	Forecast	
	Total launch	Selected products
Units	**98,000**	**40,000**
Gross sales	**1,460,000**	**600,000**
Invoiced sales	**1,453,700**	**596,600**
Launch Cost	50,000	20,000
Net sales	**1,364,263**	**565,234**
Avg invoiced sales	14.83	6.09
Avg Launch Cost	0.51	0.20
Avg Net sales	13.92	5.77
Approved lines selected		1

The financial impact of every change in the forecasted values will be calculated automatically and in real time. Keep an eye on this table in order to have your financials in check.

3 The **Products to launch** field contains the product(s) that are included in the launch.

Products to launch

Item number	Product name
Search...	
7006	Chocolate Sticks Cherry 250g

Here are listed all the products that are part of the launch. It is possible to add "dummy" products if they are not included yet in your ERP system and then update them with "real" data.

4 In the **Customers** field you get an overview of in which customer the product is launched.

Customers

Customer name	Customer number
Search...	
Carrefour	1002
Lidl	1001
Tesco	1003

All the launch planning is done to customer level and therefore it is highly important to include all the related to the launch customers.

5 The **Launch planning** field is where the planning of the products per customer can be done.

Approved	Listing state	Customer name	Item number	Product name	First shipping date	Launch Cost	1st month Predicted	1st month Forecast	M1 Start Date	M+1 Predicted	M+1 Forecast	M+2 Predicted	M+2 Forecast	M+3 Predicted	M+3 Forecast	M+4 Predicted	M+4 Forecast	M+5 Predicted	M+5 Forecast
	Search...																		
☑	Promotion	Tesco	7006	Chocolate Stick...	**10/30/2017**	20,000	10,000	**10,000**		10,000	**10,000**	5,000	**5,000**	3,000	**5,000**	3,000	5,000	3,000	5,000
☑	Promotion	Lidl	7006	Chocolate Stick...	**10/30/2017**	10,000	5,000	**5,000**		5,000	**5,000**	2,000	**2,000**	1,000	**2,000**	1,000	2,000	2,000	2,000
☑	Promotion	Carrefour	7006	Chocolate Stick...	**10/30/2017**	20,000	10,000	**10,000**		10,000	**10,000**	5,000	**5,000**	3,000	**5,000**	3,000	5,000	3,000	5,000

This area is where the true planning is done. To keep transparency and a simple overview here you will get a row per customer per product. The columns correspond to date, delivery, forecasted and predicted values.

Dashboards and built-in reporting

Accurate reports and KPIs to track your business development.

Built-in reports and dashboards provide a deep insight of the business through the system. Tracking down KPIs, customer actual sales, product sales, cost prices, gross profit, sales margin, etc, is fundamental for business development and future planning activities.

*Click on **Shared** dashboard or from the ribbon click on the **Reports** button and open a report file from the drop down selections.*

The report will open with a set of reports.

1 **P&L** tables have a full insight from customer level down to SKU level with the latest data available in the system.

All the P&L tables are calculated simultaneously with any change that can effect them in the system. P&L reflects with accuracy all your business and promotion planning. Furthermore, it can give you a clear view of the past, current and future status of the system. P&L tables are also included in key-points of the system to help with pre and post evaluation. These key-points are promotions, planning boards and launches.

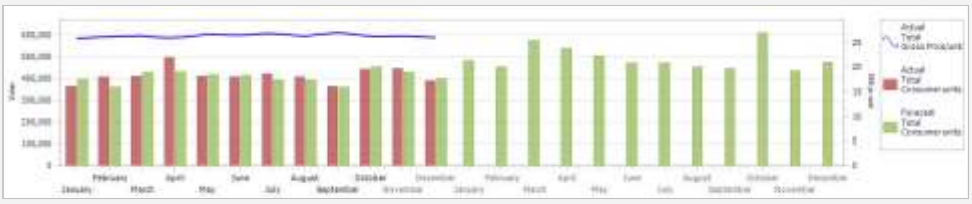
2 **Crosstabs** tables are a flexible environment, where you mix a P&L table with KPIs. These tables are additionally far more flexible than P&L, as they represent columns and rows configured by the user. However, unlike P&L tables, crosstabs are not automatic and need manual configuration prior use.

Crosstabs inherited the speed and accuracy of P&L tables, but are able to represent more than the financial values alone. You can define each the table however you want and include various KPIs.

3 **KPIs** are a bundle of tools to represent the performance of your sales. In BMS you can visualise KPIs with Traffic light and gauge graphics.

KPI graphics can be added to your reports and/or Dashboards.

4 **Graphs** are the conventional go-to tools for visualising data.



The graphs in BMs are highly configurable and can be added to your dashboards or reports.

5 **Listing and pricelist overviews** can be added to a dashboard or a report.

Other dashboard/reporting tools in BMS include text fields for notes or/and instructions together with external links to websites and documentation.

Microsoft Analysis Service Cube

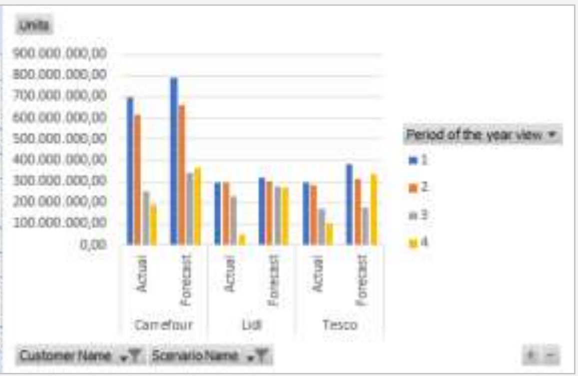
Create your business best-fitting data analysis and reports through the MS CUBE by extracting data directly from BMS.

Besides the standard reporting tools, BMS has a lot more to offer in cooperation with Microsoft Cube.
To access Microsoft Cube, you need to have Microsoft Excel installed on your computer. Once you connect to the BMS data base, there are no limits for the data analysis and reporting you can perform.

You need to have a commercial licence in order to use the Cube with BMS. But if you want to get a presentation of how this works, you can contact Effectmakers and we can arrange for you a demonstration with a demo Cube.

An example of analysing data with Cube.

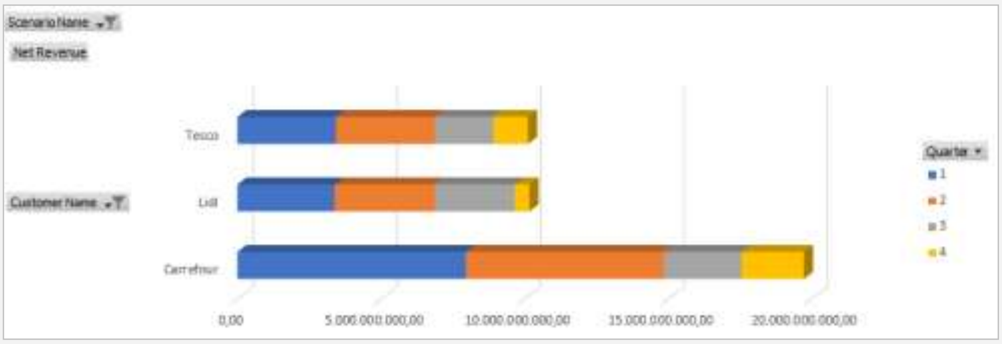
Units	Column Labels				
Row Labels	1	2	3	4	Grand Total
Carrefour					
Actual	698.698.063,66	613.251.331,22	252.840.293,38	187.659.629,86	1.752.449.318,12
Forecast	789.094.940,38	659.847.847,34	338.283.490,53	366.842.641,80	2.154.068.920,05
Carrefour Total	**1.487.793.004,04**	**1.273.099.178,56**	**591.123.783,91**	**554.502.271,65**	**3.906.518.238,17**
Lidl					
Actual	294.367.812,86	295.256.012,42	231.616.363,12	47.959.052,85	869.199.241,25
Forecast	320.126.451,75	300.579.209,30	274.588.616,90	271.447.391,05	1.166.741.669,00
Lidl Total	**614.494.264,61**	**595.835.221,72**	**506.204.980,02**	**319.406.443,90**	**2.035.940.910,25**
Tesco					
Actual	294.432.226,85	282.881.123,65	171.561.669,70	100.596.610,83	849.471.631,03
Forecast	383.635.088,96	313.028.498,30	176.453.235,77	333.803.768,54	1.206.920.595,57
Tesco Total	**678.067.315,81**	**595.909.621,95**	**348.014.909,47**	**434.400.379,37**	**2.056.392.226,60**
Grand Total	**2.780.354.584,46**	**2.464.844.022,24**	**1.445.343.673,40**	**1.308.309.094,92**	**7.998.851.375,02**

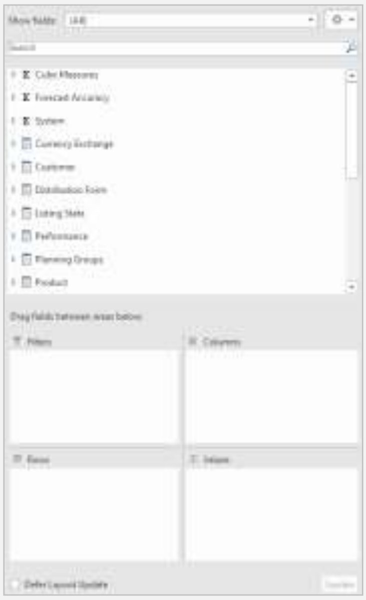


The example above exhibits three customers: Carrefour, Lidl and Tesco. The columns here are the quarters and we are interested in Forecasted values compared to Actual sales. The diagram to the right visualises the data.
The example below gives an overview of the Net Revenue over the three customers. Similarly to the above, the columns are quarters. The diagram underneath delivers an overview of the situation.

The different ways to present data.

Net Revenue	Column Labels				
Row Labels	1	2	3	4	Grand Total
Carrefour	7.962.888.628,23	6.875.684.324,89	2.736.700.335,62	2.162.553.174,82	19.737.826.463,56
Lidl	3.386.591.327,71	3.481.063.657,47	2.787.188.416,20	518.750.304,73	10.173.593.706,10
Tesco	3.434.568.424,11	3.440.705.444,56	2.042.722.872,96	1.207.759.441,52	10.125.756.183,15
Grand Total	**14.784.048.380,05**	**13.797.453.426,92**	**7.566.611.624,77**	**3.889.062.921,07**	**40.037.176.352,81**





The PivotTable fields are organized in Measurements and Dimensions. Measurements are the data you want to report and they contain your official reporting P&L. Dimensions are unmeasurable variables like customers, products, dates, etc.
By choosing from the available fields you can create different reports.

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CatMan inc. integration

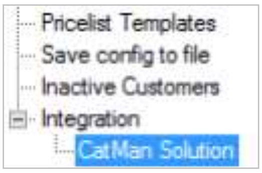
Evaluate your promotions with actual sell-out (POS data).

CatMan Solution is a POS data management solution. Full integrations can be activated in the system configuration of BMS and will provide the CatMan solution with promotion planning to allow promotion analytics down to store level. From within BMS you can download the real numbers of your promotion and get an accurate post-event P&L just after the promotion ends.

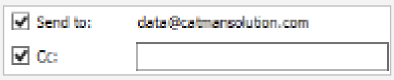
A combination of BMS and CMS is a very powerful and efficient solution. One unified solution, which provides the platform of knowledge you need when you have to prioritize and make efficient decisions in the FMCG market. CMS starts up directly in BMS CMS can be started up directly on a side in BMS with full functionality. Thus you can make your own customer or promotion plan in BMS and go to CMS without leaving the BMS solution.

The integration can easily enabled and configured.

*Go to **File**, select **System options** and select **CatMan Solution** from the tree menu on the left.*



Filter and update product and promotion data, with a simple built-in form.



You are in control of the data you share with CMS; you decide how many details you want to share. The least you can share with CMS is the EAN code of a product and you can go into more details if you want.

BMS offers you the possibility to import data from CMS for the post-evaluation of your promotions.

Data is sent to CMS by automated emails - and you can also CC yourself in the mail to keep track of the data shared.

Data from CMS is downloaded on demand by you over the internet.

Thank you for reading BMS Introduction

By now we are confident that you are capable of discovering the rest of the system on your own. However, we advise you to turn your attention to our Quick guides, if some help is needed. A number of key quick-guides is listed below.

- Creating promotions
- Evaluating promotions
- Forecasting launches
- Settling promotions
- Creating launches
- Managing listings
- Managing provisions
- Managing trade terms
- P&L
- KPI tables
- Charts
- Traffic lights & Gauges
- Configure planning boards

Download quick-guides and much more at
www.effectmakers.com/support

Please note that our support will be happy to help you in any case. Contact us from 9.00 to 16.00 CET during workdays by:

Email: support@effectmakers.com

Tel: +45 70605080

We hope you enjoy your experience and choose to work with us soon.

Best Regards,
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