

Setting up planning board

Planning boards in BMS is 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 meant 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.

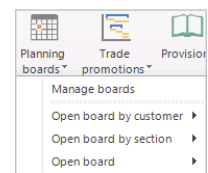
Each step is numbered and defines a phase. Each phase contains a short description and an illustration to show how to navigate or operate in the software.

On the last page it is described how to set up the Security to activate, view and edit the described tool.

Open a planning board

1 Open a planning board

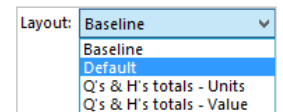
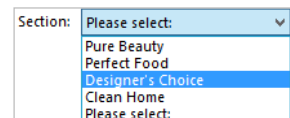
Open a planning board by Customer or by Section or bulk open it.



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.



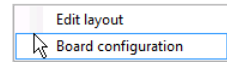
Tips and tricks are marked with an Info-icon.



Questions & Answers note relevant to the topic at hand.

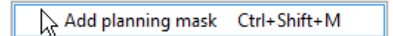
1 Open Board configuration

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
5	Body Lotion	Group 3		2 to 5						
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
11	Shampoo	Group 3		7 to 11						
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
16	Shower Gel	Group 3		13 to 16						
17	Bath & After Care	Group 2		2 to 16						
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
28	Body Cream	Group 3		19 to 28						
29	Beauty Care	Group 2		19 to 28						
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
33	Toothpaste	Group 3		31 to 33						
34	Dental Care	Group 2		31 to 33						
35	Pure Beauty	Group 1		2 to 33						

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.

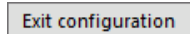
The previous board, now included the Grand total lines, should look like the next picture.



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
1	Grand total	Grand total		2 to 33						
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
6	Body Lotion	Group 3		2 to 5						
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
12	Shampoo	Group 3		7 to 11						
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
17	Shower Gel	Group 3		13 to 16						
18	Bath & After Care	Group 2		2 to 16						
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
29	Body Cream	Group 3		19 to 28						
30	Beauty Care	Group 2		19 to 28						
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
34	Toothpaste	Group 3		31 to 33						
35	Dental Care	Group 2		31 to 33						
36	Pure Beauty	Group 1		2 to 33						
37	Grand total	Grand total		2 to 33						

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 soon 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	2018	1	2	3	4	5	6	7	8	9	10	11	12	Q4	TOTAL	Target					
	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Value	YTD + YTC %				
Grand total - total	106,400	108,000	116,100	130,500	108,500	107,600	118,600	134,700	120,500	121,000	118,600	166,100	101,600	98,400	100,100	300,100	1,325,400	41,966,593	1,584,000	83.67 %	83.67 %
Body lotion - total	5,500	5,500	6,500	17,500	5,500	5,500	7,000	15,000	7,000	7,000	7,000	21,000	5,000	4,500	5,000	14,500	71,500	1,480,237			
Body lotion Rose	5,500	5,500	6,500	17,500	6,000	5,500	5,500	17,000	6,500	7,000	7,000	20,500	5,000	5,000	5,000	14,500	68,500	1,490,592			
Body lotion Vanilla	5,500	5,500	8,200	19,200	5,500	6,500	7,000	18,000	7,200	6,500	5,500	19,200	5,000	4,500	5,000	14,500	71,500	1,504,182			
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	25,000	25,000	300,000					
Body lotion - total	16,500	16,500	21,200	54,200	17,000	17,500	19,500	54,000	20,700	20,500	19,500	64,700	14,500	14,000	15,000	43,500	212,400	5,625,060	308,000	70.80 %	70.80 %
Shampoo - total	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	6,500	20,500	95,000	2,338,417			
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	6,500	20,500	92,500	2,336,468			
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	8,000	23,000	98,000	2,514,687			
Shampoo Shiny	7,500	7,500	8,500	23,500	9,000	7,500	8,000	24,500	8,000	8,500	8,000	24,500	6,500	6,500	6,500	19,500	92,500	2,321,687			
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	35,000	35,000	400,000					
Shampoo - total	30,500	30,500	34,000	95,000	32,000	30,500	34,500	94,000	35,000	35,000	35,000	104,500	29,500	27,000	27,000	83,500	378,700	11,261,248	420,000	90.17 %	90.17 %
Shower Gel - total	8,000	8,500	8,500	25,000	8,000	8,000	8,500	24,500	8,500	8,500	8,500	25,500	7,500	7,500	8,000	23,000	98,000	2,395,387			
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	25,500	7,500	7,500	8,000	23,000	97,000	2,368,883			
Shower Gel for Women	9,000	9,500	9,500	28,000	9,000	9,000	10,000	28,000	10,000	10,000	10,000	29,500	8,500	8,500	9,000	28,500	111,000	3,016,480			
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	30,000	30,000	360,000					
Shower Gel - total	25,000	26,500	26,500	78,000	25,000	25,000	27,000	77,000	27,000	27,000	26,500	86,500	23,500	23,000	24,000	79,500	306,000	8,183,900	360,000	85.00 %	85.00 %
Bath & After Care - total	72,000	73,500	81,700	227,200	74,000	73,600	80,000	227,000	82,200	82,300	80,500	245,400	67,500	64,000	66,000	197,500	897,100	24,832,848	1,088,000	83.06 %	83.06 %
Body Cream - total	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	2,300	6,900	35,500	1,364,875			
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	3,000	9,000	38,000	1,370,500			
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	2,300	6,900	28,300	1,111,195			
Body Cream Lifting	3,000	3,000	3,000	9,000	3,000	3,000	3,200	9,200	3,200	3,200	3,200	9,600	3,000	3,000	3,000	9,000	36,800	1,446,800			
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	4,500	13,500	56,000	2,308,000			
Body Cream Men	1,500	1,500	1,500	4,500	1,600	1,700	1,500	4,800	1,200	1,200	1,000	3,400	1,200	1,500	1,500	4,200	16,900	798,275			
Body Cream Hydrating 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	3,000	9,000	37,000	1,482,600			
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	2,500	7,500	32,000	1,432,000			
Body Cream Sensitive	2,300	2,300	2,300	6,900	2,300	2,300	2,700	7,800	2,700	2,700	2,700	8,100	2,300	2,300	2,300	6,900	31,200	1,396,200			
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	30,000	30,000	360,000					
Body Cream - total	24,400	24,500	24,400	73,300	24,500	24,600	28,600	77,700	28,300	28,300	28,100	84,700	24,100	24,400	24,100	72,600	308,300	13,796,425	360,000	85.64 %	85.64 %
Beauty Care - total	24,400	24,500	24,400	73,300	24,500	24,600	28,600	77,700	28,300	28,300	28,100	84,700	24,100	24,400	24,100	72,600	308,300	13,796,425	360,000	85.64 %	85.64 %
Beauty Care - % of grand total	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	1,298.00 %	1,208.00 %	100.00 %	100.00 %
Grand total - total	106,400	108,000	116,100	130,500	108,500	107,600	118,600	134,700	120,500	121,000	118,600	166,100	101,600	98,400	100,100	300,100	1,325,400	41,966,593	1,584,000	83.67 %	83.67 %
Grand total - accumulated	106,400	214,400	330,500	330,500	439,000	546,600	665,200	665,200	785,700	906,700	1,025,300	1,025,300	1,126,900	1,225,300	1,325,400	1,325,400	8,697,400	274,881.4			

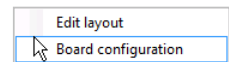
Delete masks, level totals & grand totals

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) to delete

Select the line(s) you want to delete, 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

