

BMS to CatMan® Solution interface

Introduction

This Quick guide will give you an overview of how to transfer data to CatMan. You can transfer products and promotions. In the end you know how to transfer data to CatMan.

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.

CatMan Solution is a POS data management software.

You can transfer two types of data elements to CatMan: promotions and product master data.

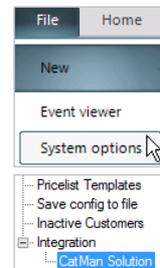
The idea is that you update the information to CatMan nightly. You can send the data to yourself to check that it is the right information you are transferring to CatMan.

It is your own responsibility to contact CatMan to make sure they setup your data correctly.

Introduction

1 Open System options

Click File in upper left corner of the screen. Click System options in the menu to the left. In the pop-up window, find CatMan solution in the bottom of the menu to the left and click on it.



2 Enter information to update

Enter the information you want to transfer into the matching fields in the window.

The different options will be described on the following page of this guide.

! Put yourself as Cc

In Email profile, you can check Cc to write your own email. If both Send to and Cc is checked, you will get a copy of the data you send to CatMan.

If you only check Cc, you can check if it is the correct data in Excel, before sending it to CatMan.

 Send to: data@catmansolution.com
 Cc:

3 Activate the transfers

It is intended that BMS updates information to CatMan nightly.

If you e.g. only want to update product master data, you can uncheck the box for Upload promotions nightly.

 Upload product master data nightly
 Upload promotions nightly

4 Click Send

When you have entered the relevant information, it is important to click Send. You can transfer both product master data and promotions to CatMan.

i Preview data

You can also click Preview data to check what data you are about to transfer. You can do this before sending.



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.

Section header here

Filtering

You can choose to filter what you update to CatMan. Check what you want to update in both drop-down lists. Check the product hierarchies you want to update. In Product state, check the product statuses you want to update.

Filtering	
Brand	<no value>, HAIR , CLEAN , SOFT Drink, MUTARDE , TOMAT...
Product state	Active, Delisted, Establishing, Delisting next window, New n...

Choose product data to update

Enter:

- Product: Click Blank if you do not want to update any specific information about the products or check Product name if you want to update Product names.
- Supplier: Select in the drop-down list if you want to update a product hierarchy in your supplier.
- Main brand: Select in the drop-down list if you want to update a product hierarchy as your main brand.
- Brand: If you want to update a product hierarchy to your brand, select in the drop-down list.
- Product type: Select in the drop-down list, the product hierarchy you want to update as product type.
- Size: Select whether you want to update a product hierarchy as size and select the product hierarchy in the drop-down list. Or you can select Base unit.
- Weight: Check either Blank or Kg depending on what you want to update to CatMan.
- Weight unit: Enter the weight unit.

Mapping	
CMS field	BMS
EAN code	Mandatory
Product	<input type="radio"/> Blank <input checked="" type="radio"/> Product name
Supplier	Brand
Main brand	
Brand	Sub brand
Product type	
Size	<input checked="" type="radio"/> Product size <input type="radio"/> Base unit
Weight	<input checked="" type="radio"/> Blank <input type="radio"/> Kg
Weight unit	Kg

Update promotions

Filtering

Here you can choose to filter which promotions you update.

- State: Check the statuses of the promotions you want to transfer.
- Type: Check the types of promotions to transfer.
- Media: Check the execution of the promotions you want to transfer.
- Purpose: Check the purposes you want to transfer.

Filtering	
State	Planned, Await forecast approval, Internal approved, Send to Chain, Approved b...
Type	Leaflet, Instore, Priority, Sales cycle, Customer theme, Co-promotion, Buy 3, pay 2...
Media	High support, Medium support, Low support, No support
Purpose	Build share, Keep distribution, Launch new products, Demanded by customer, Cr...

Choose product data to update

Enter:

- Promotion type: Select the type of promotions you want to update.
- Position: Select the position of promotions you want to transfer.
- List price: You can either click Blank if you do not want the list price(s) to be updated. Or you can choose the list price; Blank, Invoice price, Net price or Chain price.
- Cost price: Click Blank, if you do not want the costs prices to be updated, or check Cost price and/or Tax to update both or just one of them.
- Units: Click Blank to not update units or click; Forecast, Settled, Promotion volume or Automatic to select the measurement of units.
- Unit discount: Click Off invoice promotion discount pr. Unit if you want this discount to be transferred.
- Subsidy: Click Fixed allowance pr. EAN code to transfer this subsidy to CatMan.

Mapping	
CMS field	BMS
Promotion ID	Mandatory, ID of promotion
Chain	Mandatory, customer name
EAN Code	Mandatory, SKU EAN Code
Product	Mandatory, name of product
From date	Mandatory, first instore date
To date	Mandatory, last instore date
Promotion state	Mandatory, state of the promotion
Promotion type	<input checked="" type="radio"/> Type <input type="radio"/> Media <input type="radio"/> Purpose <input type="radio"/> Mechanics <input type="radio"/> Placement in store
Position	<input type="radio"/> Type <input type="radio"/> Media <input type="radio"/> Purpose <input checked="" type="radio"/> Mechanics <input type="radio"/> Placement in store
List price	<input type="radio"/> Blank <input type="radio"/> Invoice price <input type="radio"/> Net price <input checked="" type="radio"/> Chain price
Cost price	<input type="radio"/> Blank <input checked="" type="checkbox"/> Cost price <input checked="" type="checkbox"/> Tax
Units	<input checked="" type="radio"/> Blank <input type="radio"/> Forecast <input type="radio"/> Promotion volume <input type="radio"/> Settled <input type="radio"/> Automatic
Unit discount	<input type="radio"/> Blank <input checked="" type="radio"/> Off invoice promotion discount pr. unit
Subsidy	<input type="radio"/> Blank <input checked="" type="radio"/> Fixed allowance pr. EAN Code