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.

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.

CatMan Solution is a POS data management software.

You can transfer two types of data elements to CatMan: promotions and product master data.
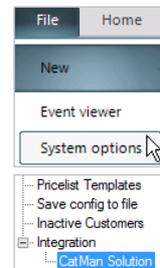
The idea is that you update the information to CatMan nightly.
You can send the data to yourself to check that it is the right information you are transferring to CatMan.

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

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.

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.

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(i) 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.

(i) 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.

Update promotions

(i) 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.

(i) 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.

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