

Creating products manually

Introduction

This Quick guide will give you an overview of how to create products manually in BMS. After this guide you will be able to create your own products and know how to keep them updated.

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.

You can create a new product manually or by importing from an Excel file (See *Quick guide Uploading and importing files on cloud*).

When you create a new product it is automatically saved in the systems' product list, even if you do not enter any information about the product BMS will automatically create an ID for the product.

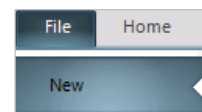
The optimal way to create your products in BMS is to create one product manually, export it as an Excel file and then mapping the template and use it to import all of your products.

It is recommended to have a well updated product list in the system, as products are one of the most important factors to be able to work with the system.

Create a new product

1 Click New

Click on File in the upper left corner of the screen and click on New below.



2 Create a product

Click on Product. A new tab will be created and now you are ready to start entering your new Product's information.



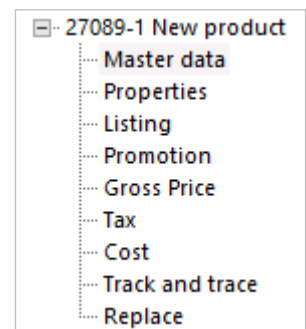
You have the option to create a new product but not enter information about it. The system will create an ID for this product and will keep it in the product list. Thus, you can always have a dummy product, where you can update the information.

The Product module

Options

To the left, a list has been shown with the options:

- Master data: In this part you write basic information about the product.
- Properties: In this part you write all the peculiar properties of the product.
- Listing: In this section you are listing the product with your customers.
- Promotion: In this field all the promotions this product has been and will be listed are displayed.
- Gross price: In this part the different prices that are applied in this product are displayed.
- Tax: Here the taxes that may follow this product are displayed.
- Cost: In this section you can add any kind of costs that follow this product.
- Track and trace: In this part you can track all data-types this product has been included.
- Replace: Here you can replace in specific planning masks of the product with another product.



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.



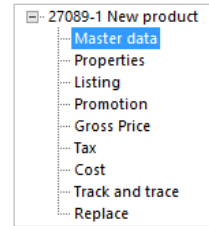
What is a dummy product? Dummy products are products that do not exist in ERPs yet. Dummy products can be created in BMS by creating a new product with no information at all.

Master Data

Here you add information about your product. You must fill in as many fields as possible, otherwise the product will be considered as a Dummy product.

1 Open the corresponding tab

Click on Master data in the list to the left.



2 Product information

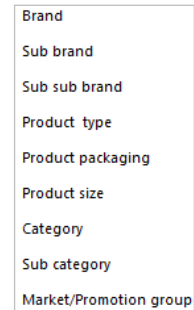
Enter the necessary information about the product:

- ID: Product ID is generated by BMS and is unique for each product.
- Hidden: Check or uncheck the box to either hide or show the product by default on the product list.
- Display: Check or uncheck the box to indicate whether the product is a display or not.
- Product name: It is the name/title of the product.
- Item number: It is the product's unique item number, which is also the key that can link the product to other systems.
- Product state: Here you can choose what the state of the product is or will be.
- Consumer units per package: Is the number of product items included in one sales unit per package.
- Valid period: The period the product will be operating.
- EAN consumer unit: European Article Number, Barcode, for a consumer unit.

ID:	35956	<input type="checkbox"/> Hidden	<input type="checkbox"/> Display
Product name:	TOMATO Ketchup 500 ml		
Item number:	1007		
Product state:	Active		
Consumer units pr. package:	6		
Valid period:	01-01-2010	to	31-12-2025
EAN consumer unit:	5123657895430		

3 Additional product information

In this field will be displayed the Product hierarchy dimensions. These dimensions are pre-configured from your organization in order to describe the product more in details. *(The picture is an example of the dimensions).*



4 Add component if existing

In the component field you can add the component products. This field is only editable, when the checkbox Display is checked. Use the ribbon buttons or right-click in the field to start editing.

Display	Consumer un...	Item number	Product name	Consumer units...	Gross Price (Co...	COGS	Brand
Search...							

5 Add Notes

The Notes field is placed to the right of the tab. Here you can write down important notes about the product if needed.

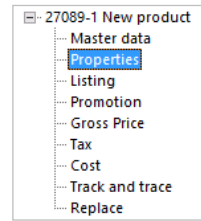


Properties

In this section you add detailed information about the product.

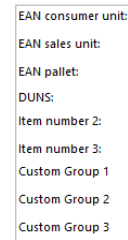
1 Open the tab

Click on Properties in the list to the left. Now you have opened a new tab and you are ready to start entering your product's information.



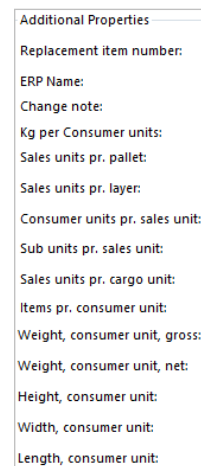
2 Properties

- EAN codes: European Article Number, Barcodes.
- DUN code: Distribution Unit Number.
- Item number 2 & 3: These are the products' second or third item number, which are also the keys that can link the product to other systems.
- Custom groups: These fields can be configured by your organization to add more information groups about the product.



3 Additional product properties

- Replacement item number: This item number is used by the Auto-substitution function.
- ERP name: The original created name of the product by the interface.
- Change note: This is shown in the planning window on SKU's.
- Kg per consumer unit, Sales units per pallet, Sales units per layer, Consumer units per sales unit, Sub units per sales unit, Sales unit per cargo unit: Quantity measure unit fields.
- Base unit: The fundamental unit that is defined arbitrarily and not by combinations of other units.
- Items per consumer unit: The number of items one consumer unit contains.
- Weight, Height, Width, Length: Measurements of a consumer unit.



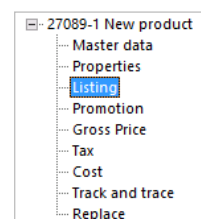
Listing

In this field, you can see the listing details of the selected product for all customers and their underlying banners.

Here you have the option to edit a list for the specific product, customizing listings in one place instead of on every customer separately.

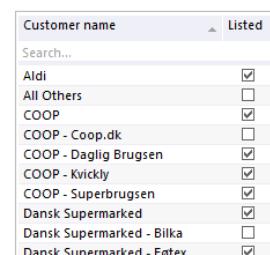
1 Open the tab

Click on Listing in the list to the left. Now you have opened a new tab and you are ready to start listing your customers with the product.



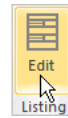
2 Customer

Choose the customers from the list by clicking the box.



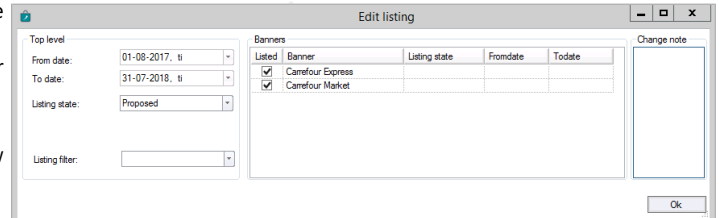
3 Edit the selected customers

In the ribbon, click on Edit and a new window appears on the screen.



4 Enter the listing information

- From date: The starting date that the listing state should take effect from.
- To date: The end date the listing state should take effect.
- Listing state: Select a listing state from the drop-down list.
- Listing filter: Select a listing filter from the drop-down list.
- Banners: Select Banners if exist.
- Change note: Notes that follow the listing.



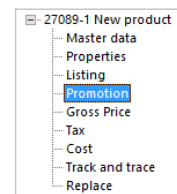
Click on Ok, when you are done.

Promotion

The promotions, this product will be operating on, will appear on the promotion screen.

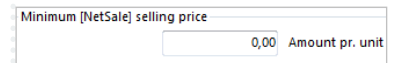
1 Open the tab

Click on Promotion in the list to the left.



2 Add Selling price

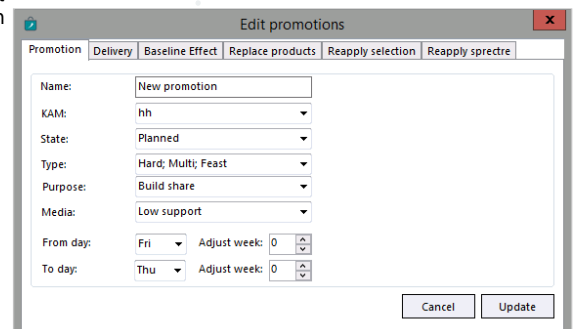
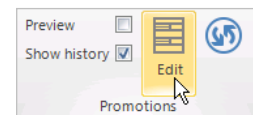
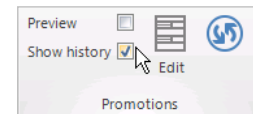
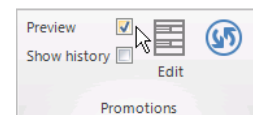
Add a Minimum (NetSale) selling price.



3 Campaigns

Edit the fields:

- Campaigns: Here you have the list with all the campaigns the product displays. When accessing the promotion details for the product, you have access to specific promotion options from the Promotion ribbon. The Promotion ribbon allows you to work with the selected product in the promotion window.
- Preview: Check or uncheck to preview the selected promotion. This will open a window at the bottom of the screen enabling you to view details for the selected promotion.
- Show history: Check to view all promotions past as well as future. By default, only future promotions are displayed.
- Edit: Click to edit one or several promotion(s) in the window that opens. But, first, you have to select at least one promotion from the Campaign field.



Quick guide for BMS



You can right-click on the fields and add or delete lines, as well as do some extra functions with your lines.



Once you delete something, you cannot undo it.

Gross price

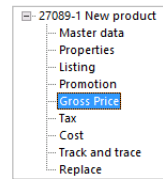
In this field, you can add several gross prices for your product.

1 Open the tab

Click on Gross price in the list to the left.

2 Add prices

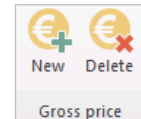
Add a Retail price and a Minimum net price in the fields.



Retail price	<input type="text" value="0,00"/>	Amount pr. unit
Minimum Net Price	<input type="text" value="0,00"/>	Amount pr. unit

Add Gross prices

You can add several lines in the field and maintain the data every time as you want. Click New or Delete on the ribbon to add or delete lines.



Gross price						
Drag a column header here to group by that column.						
Pricelist name	From Date	To Date	Gross Price (Consumer ...	Gross Price (Sales units)	Retail price (Pricelist)	
Search...						

Tax

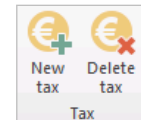
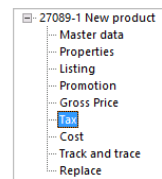
In this field the tax cost is displayed. You can add several tax prices for your products' cost.

1 Open the tab

Click on Tax in the list to the left.

2 Add tax

Click New or Delete in the ribbon to add or delete lines.



Tax					
Drag a column header here to group by that column.					
Origin	Total tax (sales unit)	Total Tax (Consumer units)	From Date	To Date	Tax 1
Search...					

Cost

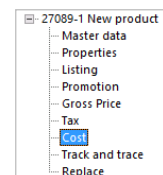
In Cost, you can view the cost prices for the selected product. In this window, you can see the cost price history over a given period of time.

1 Open the tab

Click on Cost in the list to the left.

2 Add costs

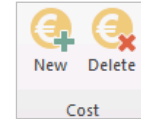
Add Distribution (logistic) costs and Obsolete.



Distribution (Logistic) costs	<input type="text" value="0,00"/>	Amount pr. unit
Obsolete	<input type="text" value="0,00"/>	% of Net Sale

3 Add Product cost

You can add several lines in the field and maintain the data every time as you want. Click New or Delete on the ribbon to add or delete lines.



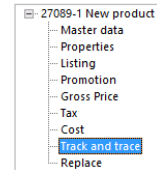
Product cost				
Origin	COGS (Consumer units)	From Date	To Date	COGS (Sales units)
Search...				

Track and trace

All the activities this product is being involved in will be displayed in this field.

1 Open the tab

Click on Track and trace in the list to the left.



2 Monitor the data

Click on Datatype to extent the display of the activities. *(The picture is an example).*

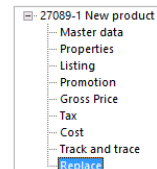
Scenario	
Datatype	Customer
Search...	
▷ (none) (2 items)	
▷ Actual (31 items)	
▷ Forecast (51 items)	
▷ Orders (8 items)	
▷ Predicted baseline (9 items)	
▷ Promo Eval POS (6 items)	
▷ Promo Eval Sell-In (6 items)	

Replace

All the activities this product is being involved in will be displayed in this field.

1 Open the tab

Click on Replace in the list to the left.



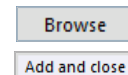
2 Select planning board

Select from the list of the Planning boards this product exists. This is where the product will be replaced with another.

Planning board masks (1)	
Select the planning board masks below	
Board Name	
Search...	
Sell-in planning 2017	

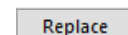
3 Find replacement product

Click Browse to open a new window will all the product in the system. Find the product of replacement and Add and close to add it to the field.



4 Replace

Click on replace and the product will be replaced simultaneously in every planning board you selected.



Creating products manually

Questions & Answers



What is a Dummy Product?

Dummy Products are products that do not exist in ERP's yet. Dummy Products can be created in BMS by just creating a new product with no information about it.



How do I delete a product?

You can delete a product in two different ways. Delete it while displaying it, by clicking the delete button on the products' ribbon. Delete it from the Product List, by selecting the product and click on Delete button on the ribbon. But, if you want to delete a product from the system, you have to be careful as you cannot undo it. A better solution is to mark the product as Delisted or Hidden.