

Dummy planning

Introduction

This Quick guide will show you how to do dummy planning. It is possible to do this for products, customers, and stores.

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.

This topic is relevant for users who use an automatic interface with an ERP system and when it comes to maintaining master data. It is useful if you want to plan on products, customers or stores that are not yet registered in your ERP system.

This guide will take you through the processes of planning dummy products, dummy customers and dummy stores, as well as the process of upgrading from dummy to actual.

Setting up a dummy product

1 Add new dummy product

Select Data in upper left corner and click on Manage dummy products. Choose Create dummy product in the drop-down list.



2 Name the product

Enter Product name and Item number (identical to number in ERP system).

Product name:	New product
Item number:	20170725-092606



You can upload the product(s) from Excel, if you already have it.

3 Set Product state

Select the state of the dummy product.

Product state:	Active Dummy
	Active Dummy
	Inactive Dummy

4 Fill in details

Fill in details about the dummy product.

Consumer units pr. package:	12
EAN consumer unit:	569877425255

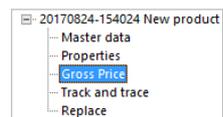
5 Define hierarchy

Define the product hierarchy for your new product in the drop-down lists. We strongly advise you to define the hierarchy levels required by the trade terms you usually use.

Brand	BODY	+
Sub brand	ECO	+
Sub sub brand	Creme	+

6 Add the price

Click Gross price in the menu to the left. Enter Retail price and Minimum net price.



Retail price	8,00	Amount pr. unit
Minimum Net Price	10,00	Amount pr. unit



The guide *may* contain important general notices. These will be marked with an exclamation icon.



Tips and tricks are marked with an Info-icon.



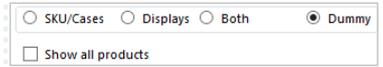
Questions & Answers note relevant to the topic at hand.

Using the dummy products

Generally, the use of dummy products does not differ from the use of actual products. You can launch them, as well as plan baseline and promotions.

1 Locate the Dummy filter

Once you choose products in a Browse window relevant to a planning procedure, you will be presented with a Dummy product filter to access the dummy products easier.



2 Add the products

Select the products you want and click Add to add them one-by-one or multi-select them and click Add and close.



Upgrading a dummy to actual product

1 Open dummy products list

Click Manage dummy products, and choose View dummy products in the drop-down list.



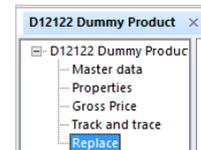
2 Open dummy product

Double-click on the dummy product in the list to open it.

20161027-122955	New product	1	<input type="checkbox"/>	Active Dummy
20161129-150213	New product	1	<input type="checkbox"/>	Active Dummy

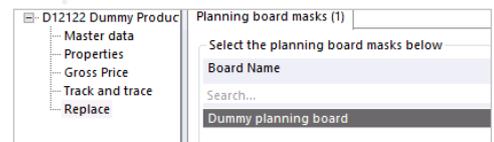
3 Open Replace

Click on Replace in the menu to the left of the tab.



4 Select the planning board

Select Planning board, where the Dummy product exists.



5 Replace the Dummy product

Click Browse to open the list of all the product and select and Add in the field and click Replace. The Dummy product will be replaced automatically.

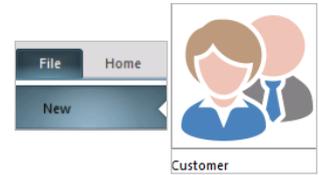


Planning on new customers

Creating and planning on a dummy customer functions the same way as creating and planning on a regular new customer. Therefore, the procedure is the same.

1 Add a new customer

Select File/New in upper left corner and click on Customer icon. A new customer window opens up automatically.



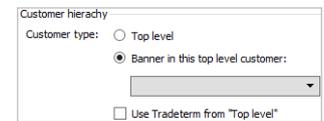
2 Name the customer

Enter Customer name and Customer number (identical to number in ERP system).



3 Define the customer

Define the relevant properties of the customer such as: customer type, settlement, and promotion settings.



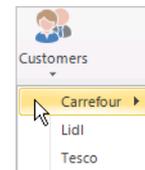
When a dummy customer enters your ERP system and becomes regular, make sure to synchronize the customer numbers. In order to work seamlessly they need to match.

Planning on new stores

Store level planning is available using planning boards. The dummy stores and regular stores only differ by the way you name them.

1 Open a customer

Click Customers in the ribbon and select the customer you want to plan on.



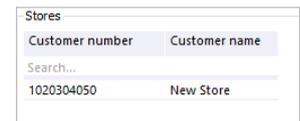
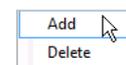
2 Go to Stores

Click Settings in the menu to the left of the screen, and then click Stores in the top menu that now appears.



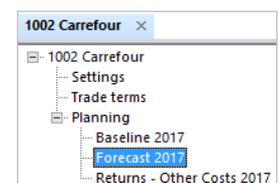
3 Create a dummy store

Right-click in the field and click Add. Enter Customer name and Customer number.



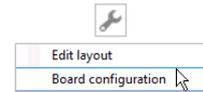
4 Open a planning board

Click on the planning board from the planning menu to the left. A new tab will open with the selected planning board.



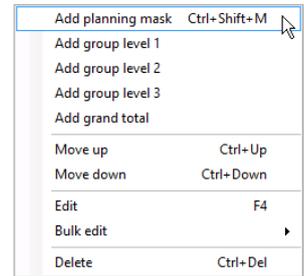
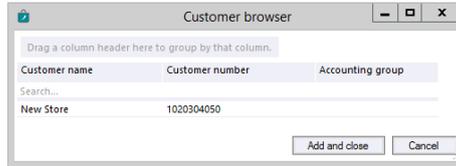
5 Open board configuration

Click on the wrench icon in the top right corner and click Board configuration.



6 Add planning mask

Right-click in the field and click Add planning mask. Assign the dummy store to the mask in Stores.

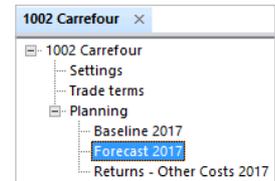


Replace a dummy store with an actual store

When you have a regular store created in your ERP, you can replace your dummy with the regular in BMS .

1 Open a planning board

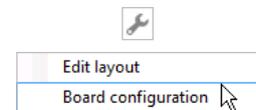
Click on the planning board in the menu to the left.



Make sure your real store is created, before you replace it with your dummy store.

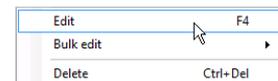
2 Open board configuration

Click on the wrench icon in the top right corner and click Board configuration.



3 Edit planning mask

Right-click on the planning mask you have assigned the dummy store to and click edit.



4 Remove the dummy store

In stores field, right click on the dummy store and select Remove to delete the store from the mask.



5 Replace with actual store

In stores, click browse and find the replacement store and add it. BMS will recalculate the mask and allocate the planning to the actual store.

