

Creating customers

Introduction

This Quick guide will show you how to create a new customer. The data that needs to be filled in is; customer name, number, customer type, settlement, calculation method and delivery profile. In the end you have a new customer in BMS.

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.

1 Add new customer

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



2 Name the customer

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

Basic Data | Promotion Settings | Rules | Market and Spaces | Stores | Acc

Master data

ID: Active

Customer name:

Customer number:

3 Define customer

Enter Customer type:
 Top level customer = Wholesaler
 Banner = A chain below a wholesaler.
 If banner is selected, select the top level customer in the drop-down list.
 Check Use tradeterm from top level, if no specific trade terms are valid for the banner.
 Other settings are company specific.

Customer hierarchy

Customer type: Top level Banner in this top level customer:

Use Tradeterm from "Top level"

4 Promotion Settings

Settlement: Select Sell in, if variable promotion allowances are based on sell in. Alternatively, select Sell out.

Settlement: Sell in Sell out

Define default start and end date for promotion with the customer by using the arrows.

Start day:

End day:

5 Define settings for promotion allowances

- If you are using:
- 1) Variable promo allowance on invoice: Define default calculation method in drop down (here "% of Gross" is defined) and enable if discount can be given as % or amount.
 - 2) Variable off invoice %-promotion allowance: Define default calculation method in drop down (here "% of Invoice" is defined) and enable discount as %.
 - 3) Variable off invoice €-promotion allowance (fixed amount/unit): Define default calculation method in drop down (here "Amount" is defined) and enable discount as amount.
 - 4) Default Fixed allowances – here defined as Off invoice.

Tip: You can enable other options if they are used on the customer.

Basic Data | Promotion Settings | Rules | Market and Spaces | Stores | Account Numbers |

Promotion settings:

Convert sell in/out when typing, with ratio:

Settlement: Sell in Sell out

Start day:

End day:

Default calculation methods

Var. Promo. Allow. on Invoice:

Enable: Amount % of Gross % of Invoice % of Chain Price

Variable Promotion Allowance 1:

Enable: Amount % of Gross % of Invoice % of Chain Price

Promotion Bonus to Customer:

Enable: Amount % of Gross % of Invoice % of Chain Price

Fixed Promo. Allowance Off Invoice:

Enable: On Invoice Off Invoice

Sales tax:

6 Set default promotion delivery template

Forecast for every promotion will be allocated to a delivery week. Promotion in store week is week 0, and -1 is the week before. -2 is 2 weeks before. In the example, default delivery is set to 80% 2 weeks before and 20% 1 week before for SKU. For display default delivery is 100% 2 weeks before. Need for more weeks: Right click in table and select Add to first or Add to last.

Week	SKU	Display
-2	0	0
-1	100	100

Week	SKU	Display
-2	0	0
-1	1	

- Add to first
- Remove from first
- Add to last
- Remove from last

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Questions & Answers



How do I add a week to the delivery profile?

Go to Settings, and under Promotion Settings, you find the Delivery profile template for new promotions. Right-click within the area and choose Add to first.
You can also remove a week by clicking Remove from first instead.



Where do I maintain the customer's item number?

Go to listings and find the Customer item number in the menu of the listing.