

# Managing trade terms

## Introduction

This Quick guide will show you how to manage your Trade Terms and Conditions. You will learn how to create and maintain Trade Terms and Conditions.

## 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.

In BMS you can manage your Trade terms in three different ways. Manage them as a set of discounts, as individual conditions or load them from a custom interface (usually similar to the individual conditions functionality).

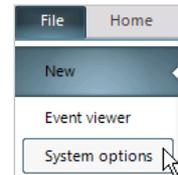
To choose the way you want Trade terms to be handled in BMS, is easy defined from the System options of the application.

Moreover, Trade terms are defined individually per customer.

## Define Trade Terms

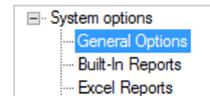
### 1 Open System options

Click on File and then select System options to open. The System Options window will open on the screen.



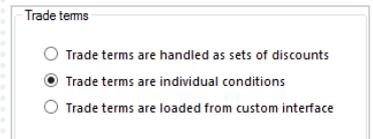
### 2 Open General options

On the tree-menu click on General Options to open the corresponding tab on the main window.



### 3 Select Trade terms

From the Trade Terms section mark the way you want to display your Trade Terms.

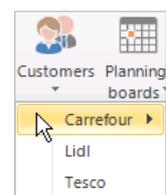


Close the System Options window, the changes are saved simultaneously.

## Create Trade terms as a set of discounts

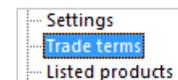
### 1 Select customer

Click on Customers in ribbon and select customer in the drop-down list.



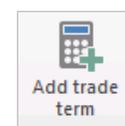
### 2 Go to Trade terms

Click on Trade terms in left navigation pane. The corresponding tab will open.



### 3 Create a new trade term

Click on Add trade term in ribbon: A new term is created in the field below. The new Trade Term has a unique ID number and default Name. Click on the line of the new Trade Term to select it and to open the conditions field on the right of the tab.



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.

#### 4 Edit the Trade Term

Name the Trade Term on the top field.  
 Enter the discounts for the trade term in the chart below the name.  
 Type in Percent directly or use the arrows.  
 More options in the Contracted Allowance field to fill if there are banners under the customer you created the Trade Term.  
 Choose Calculation Method.

Selected trade term

General Terms incl. Banners

Discount name	Percent	Amount
Contract Discount %	31,00 %	Amount pr. sales unit 31,00
Other Discount %	5,00 %	% of Gross 5,00
Logistic rebate %	0,00 %	% of Balance 0,00
Range	0,00 %	% of Gross 0,00
<b>= Invoiceprice</b>		<b>64,00</b>
Joint Marketing%	3,00 %	% of Invoice 1,92
Loyalty %	0,00 %	% of Invoice 0,00
Range/Choice%	0,00 %	% of Invoice 0,00

**Contracted Allowance**

Customer	Share	Discount %
<b>1002 Carrefour</b>	<b>100,00 %</b>	<b>2,00 %</b>
100202 Carrefour Express	60,00 %	2,00 %
100201 Carrefour Market	40,00 %	2,00 %

Calculation Method: % of Invoice

**= Netprice** 62,08

Royalty 1,00 % of Net ex. fix. allow.

Gross: 100,00 Discount value: 1,00 Consumer units: 6

#### ! Discount names

The discount names are setup in system options under P&L setup.  
 If you want to change these, go to file above the ribbon, choose system options, and then you choose P&L setup.

#### 5 Set date

Set a From Date for trade term.  
 When you create a new promotion, BMS by default will set the field of the To Date blank. No To Date = infinity.  
 When you will create another new trade term period, BMS will create a To Date for the previous trade term based on the From date of the new Trade Term.

ID	Trade term	From Date	To Date
226	General Terms incl. Banners	01-01-2010	31-08-2015
226	General Terms incl. Banners	01-09-2015	31-10-2015
226	General Terms incl. Banners	01-11-2015	14-05-2017
226	General Terms incl. Banners	15-05-2017	

#### 6 Assign trade terms to products

When you need to match the specific Trade Term to a product, you have to define Apply to dimension. Here you choose the product property, whether you want to match it with a brand, category or another group of hierarchy.

Then you have to define Apply to key. Here you match the product property with a key. This could e.g. be the product line (Hair, Liquid etc.).

Trade term

From Date	To Date	Default	Apply to dimension	Apply to key
01-11-2015	14-05-2017		<input type="checkbox"/>	
15-05-2017			<input checked="" type="checkbox"/>	Brand Name Perfect Home

Brand Name

- Custom Group 5
- Item Number
- Item Number 2
- Item Number 3
- Product type
- Sub Brand
- Target Group
- Target Market

Apply To dimension Apply to key

Brand Name Perfect Home

### Maintaining a set of Trade Terms

#### 1 Change Trade Term when you have to adjust a term after customer negotiations

You can add a change to a Trade term from a specific date.  
 Select the Trade term, right-click and select New period on trade term.

New tradeterm

New period on tradeterm

#### 2 Change start date and adjust %-discounts

BMS will create a copy of the term. Change the from date to the 1<sup>st</sup> valid date of the adjusted terms. BMS will automatically change the current terms end date (visible next time the window is opened).  
 Adjust the terms accordingly by changing the discount % as above.

ID	Trade term	From Date	To Date	Default
343	Super deal	18-01-2017		<input type="checkbox"/>
341	New tradeterm	31-04-2017		<input type="checkbox"/>
332	Deal	16-01-2017	16-01-2017	<input checked="" type="checkbox"/>



When you change names for trade terms with the same ID, BMS will change both of their names, as the system sees them as the same trade term but in periods.

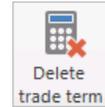
## Quick guide for BMS



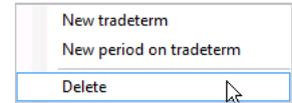
You can only delete one trade term at a time. If you want to delete more trade terms at once, you can do this when importing trade terms and selecting Delete existing data. In this way you delete the already existing data.

### 3 Deleting trade term(s)

If you want to delete a trade term, either right-click on it or click Delete trade term in ribbon. A box pops up asking if you want to delete. Click yes.

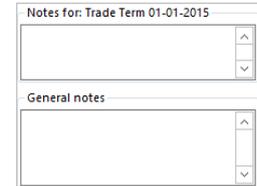


Be careful when deleting Trade Terms with the same ID. If choose to delete an old/expired Trade Term the system will ask you to delete also the underlying (with same ID) Trade Terms.



### 4 Keep Notes

Keep Notes in the fields at the down side of the Trade Terms tab.



## Set of Trade Terms layout maintenance

### 1 Edit layout

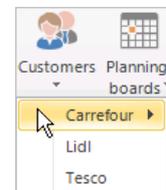
Check or uncheck the Allow sort box to allow the sort option when you select a column name. Check or uncheck the Show current only to display on the list only the Trade Terms that are currently active.

Tip: use the filter rows to filter on dates, etc.  Allow sort  Show current only

## Create Trade terms as individual conditions

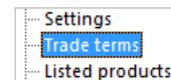
### 1 Select customer

Click on Customers in ribbon and select customer in the drop-down list.



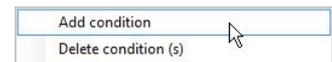
### 2 Go to Trade terms

Click on Trade terms in left navigation pane. The corresponding tab will open.



### 3 Create a new trade term/condition

Click on Add condition button or right-click and select Add condition. A new term is created in the field below. The new condition has a unique ID number.



### 4 Edit the individual Trade Term

Choose a P&L line to set to condition. Select a Value calculation to set the calculation method of the condition. Choose From Date and To Date to set the validity period of the condition. Add the Value of the condition. The value corresponds to the way of the calculation method you chose in Value calculation.

Condition ID	P&L line	Value calculation	From Date	To Date	Value
3	Joint Marketing%	% of Invoice	01-01-2017	31-12-2017	5
4	Contract Discount %	Amount pr. sales unit	06-01-2017	31-12-2018	5
5	Loyalty %	% of Invoice	01-01-2016	31-12-2018	10

## 5 Assign conditions to products

Assign every condition to specific hierarchy groups or individual products. Each condition acts individually, thus you can have infinite combinations of conditions in your Trade terms.

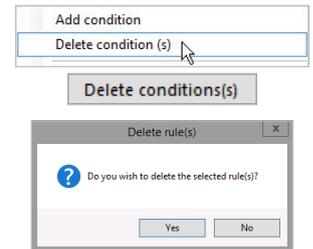
Condition ID	P&L line	Value calculation	Amount pr. unit	Total amount	Total amount auto re-booking	Brand Name	Sub Brand	Product type	Category	Target Market	Target Group	Apply to dimension	Apply to key	SpendingBudget
3	Joint Marketing%	% of Invoice	0	0	<input type="checkbox"/>	Perfect Clean		Cleanser	Home	Luxury	Household	Item Number		0
4	Contract Discount %	Amount pr. sales unit	0	0	<input type="checkbox"/>	Perfect Food		Sweets			All Groups	Item Number		0
5	Loyalty %	% of Invoice	0	0	<input checked="" type="checkbox"/>	Perfect Home		Home Decora...	Home	Luxury	Females	Item Number		0

## Maintaining individual Trade Terms/conditions

### Delete condition(s)

Select one or multiple conditions and Right-click and select Delete condition(s) or click on the Delete condition(s) button.

A confirmation window will ask for your approval of this action.



## Export Trade Terms

### 1 Export trade term data to an Excel file

Click on the Export icon in ribbon.

In the opening window select the data you want to export and click on Export button.

An Excel file opens, and you are able to save the document in the same way, you would save an Excel file on your computer.



## Import

To import your trade terms files you need to follow the same steps of the Uploading to BMS cloud - Quick Guide.

### 1 Import file to BMS

Click Import from the ribbon.

In the new window open the Choose file dropdown list and select your file.

Do the Fieldmapping of the data and then move to Import tab and click on Import button to finalize the action.



You can use the Excel file as a template for formatting the import of the trade terms.

## Managing trade terms

### Questions & Answers



*How do I edit the discount starting from next month?*

You have to add a new trade term period and change the discount on the new period.



*How do I name my set of trade terms?*

You mark the trade term and go to the right side of the window to change the name.



*How do I create a trade term for a specific brand?*

Go to trade term line, click on apply to dimension, select brand, click on apply to key, type in brand name.



*How do I define the price list for the trade term?*

Go to trade term line, click in the pricelist field of the product and click the drop-down list. Here you can select the pricelist you want to.