EFFECTMAKERS BMS

GETTING STARTED

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Introduction

Set up BMS in 10 easy steps

BMS is a software tool for Business planning and Trade promotion management. The solution is easy to implement and in this guide we will show you how to get started.

This document is a 10 step-guide that will aid you in setting up the system for the first time. After completing the procedures described here you will have a powerful solution for managing your promotion cycles and general business planning.

The intended audience for this guide is the people who signed up for our 2 month free trial and those who seek to set up the software for the first time. If you are not familiar with our trial concept, please visit this page and sign up to get full advantage of this document.

In the following we will go through 10 basic and necessary steps in order for BMS to work. These steps span across three categories as represented below:

Master data:	*Planning:*	*Configuration and Reporting:*
ⓘ Customers	ⓘ Planning boards	ⓘ Dashboards & Reports
ⓘ Products & Prices	ⓘ Trade promotions	ⓘ Preparing your data for import
ⓘ Trade terms		ⓘ Set up P&L
ⓘ Listings		

Each step in the guide will have a short description with screenshots when needed, required action and supplementary information.

> **Required action: Read this page carefully**

Note that in order to keep this document short and simple, various steps mention aspects of the application worth exploring beyond this guide. To help you, we will link to the relevant Quick-guides when necessary. Make sure to discover all the possibilities of different processes to find a perfect fit for your business and approaches.

BMS onboarding process

Once singed up, we give you everything you need to fully use our software on your own. We are confident that you can set up the system and have a working solution in a matter of days by only using this guide and any additional documentation you may need. In other words, you are able to implement our system fully according to the Assisted Implementation.

Within the free 2 months we expect you to validate a proof of concept and give an insight of BMS to your organisation. If you commit to stay with us, you get unlimited support and standard interfaces setup to help you.

Effectmakers also offers the Enterprise Implementation of BMS to accommodate big companies with high requirements. These services come at extra cost and guarantee you a fast, custom and seamless implementation of the software.
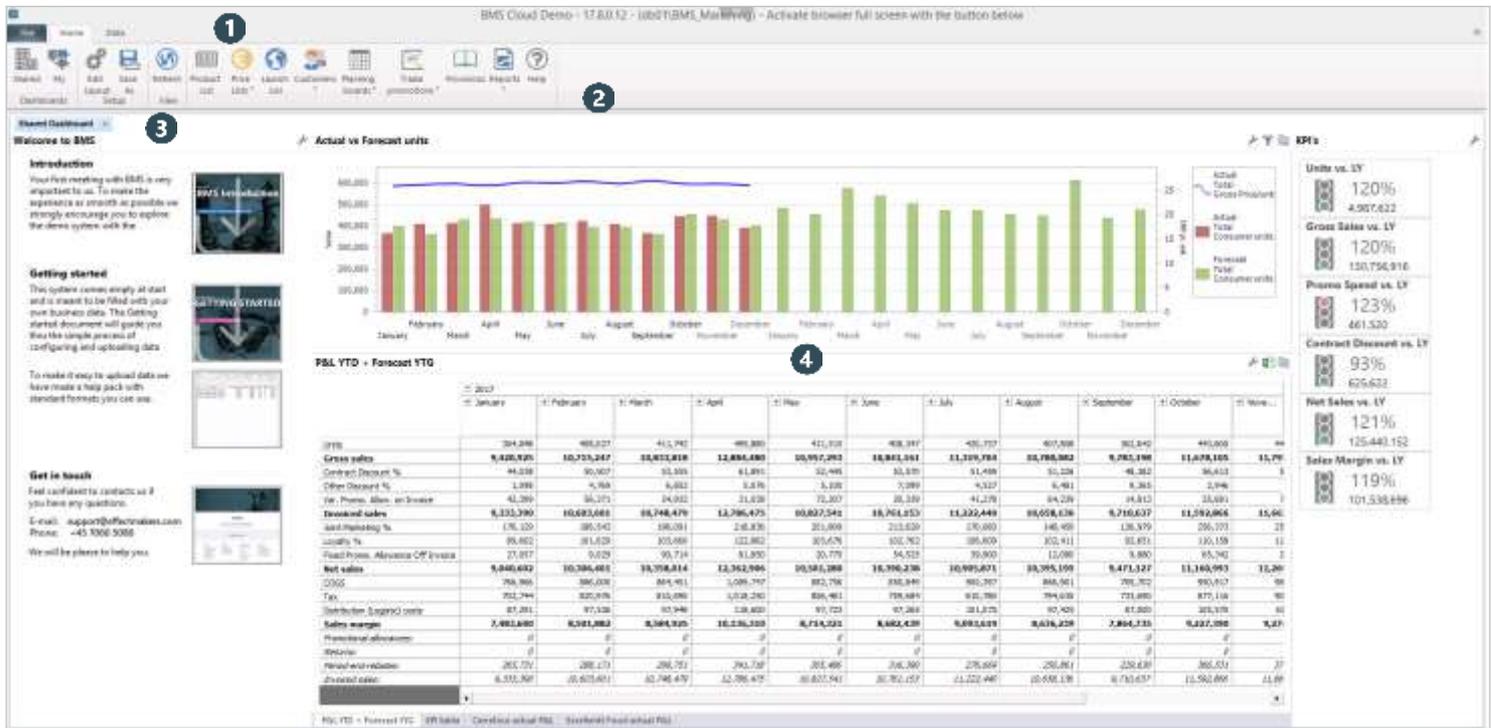

Implementation

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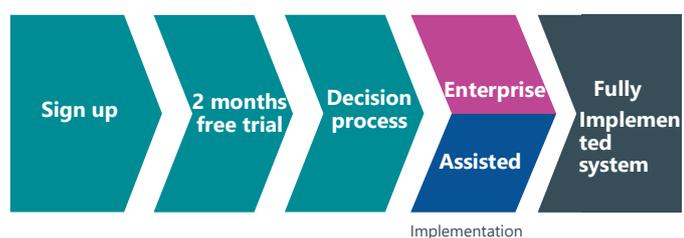
Getting started

To keep up with the following, you need to be able to navigate around in the system. This part will cover the general layout of the window and where the different items are located.

Log into the system and click around the described items

Your window should look like the one below.

1 **The Ribbon** provides access to all the functionality for both configuration and for the daily use.

"Home" is the most important and will be the one you will use mostly in the demo. From here you have access to both your master data, customers and planning areas.

"File" let's you close the application (which eventually also is important) and gives you access to areas like Security settings and system configuration.

"Data" provides access to a number of system tasks which and this is not part of the guided tour, but maye become relevant depending on how you end up implementing your solution.

2 **The ribbon changes** according to the selected tab. In the example above, the left part of "Home" shows tools for managing the Shared Dashboard. If you open the product lists, it will show the product related functions and so on.

3 **In the left part** you have easy access to this document and the Getting started guide. So you can always find your way back. Also there is a quicklink to downloading a simple package of Excel templates you can use for preparing master data and uploading into your own system.

4 **The working area** always shows the Shared Dashboard on startup. When you access the other parts of the system, the working area will keep the Shared Dashboard open in it's own Tab behind the new window you opened.

Decide whether to upload master data in Excel format

There are three ways of getting your master data into BMS: with interfaces, by creating them manually and by uploading. In this document we suggest you to use the Import templates (it is described in Appendix A), otherwise you can create your master data manually. Interfaces are available once you decide staying with us.

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Customers

Now that you have your data ready or wish to create it manually, we move on to the second step. Here you will get an introduction to how to create and manage a customer. This is an important step as all planning in BMS is carried out on/cascaded to single customers. Creating customers is thereby a mandatory and manual step.

Push the "File" button and create a customer

1 Create a customer

Go to "File" and create a customer from the "New" section.

2 Add basic data to a customer

It is mandatory to add some basic information such as name, number etc. Upon creating a customer you will automatically enter the customer settings overview, where you can find and fill the fields you intend to use.

3 Explore the customer window

Click around the window to explore all the settings and possibilities in the customer window. Note that the "Planning" section of the tree menu to the left shows different planning activities for the selected customer.

For additional information or guidance around Customers, please use the following Quick-guide:

ⓘ   *Creating customers*

Products & Prices

The third step is to provide BMS with your products and prices. This can be done manually or by importing as described in step one. The following section will cover the manual approach.

Push the "File" button and create a product

1 Create a product

Go to "File" and create a customer from the "New" section.

2 Add basic data to the product

It is mandatory to add some basic information such as name, number etc. Upon creating a product you will automatically enter the customer settings overview, where you can find and fill the fields you intend to use. If a product is a display or a part of a display, this is where you set it up as well.

3 Add the price

The tree menu to the left provides a great overview over a product's setting and activities. At this point it is important to add a price to your product/display. Go to the "Gross Price" in the tree menu and enter the prices to be able to use BMS fully.

The created products data and prices are saved in the product list. Access this list to make changes, get an overview or do other product related work. You will find the "Product list" icon in the top ribbon any-time.

For additional information or guidance around products and prices, please use the following Quick-guides:

ⓘ   *Creating products manually*

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Setup P&L

Once customers, products and prices are taken care of, turn our attention to the planning processes. The success of planning in our system relies heavily on the financial calculations and overview through the P&L. This section will thereby describe how to set up the P&L to fit your needs and calculating approaches.

Push the "File" button and go to "System options" and select "P&L setup"

1 Enable the P&L lines you want to use

The setup of your P&L is very flexible and configurable in BMS. P&L generally consists of on– and off-invoice discounts together with a number of other lines available for use. Your task here is to the P&L lines you want to use.

2 Customise the text to fit your organisation

The P&L lines have both standard and custom names. Define the custom names to fit the terminology used within your business. Note that only the custom names will be visible in your system.

3 Edit the calculation methods

P&L lines are calculated based on the methods defined in the P&L setup. Make sure to use the settings appropriate to your company's approaches and routines.

4 Explore additional settings

Besides the previously described settings you will find options for visibility, promo discounts and more. Make sure to get familiar with all the possibilities.

To get a full insight into P&L, the settings and possibilities, we advice to use the following guides:

ⓘ *Reference Guide*
ⓘ *Setting up P&L*

Trade terms

When your P&L is set up and ready, it is time to link it to trade terms. Trade terms are rules that represent rebates, discounts, etc. specified in a contract with each of your customers. Our next step is to lay a framework for your business by adding trade terms.

Push the "Customers" button in the top ribbon and select a customer. Follow up with choosing "Trade terms" in the tree menu to the left.

1 Add conditions

Add a number of conditions that correspond to the contract with a particular customer.

2 Assign P&L lines and calculation methods

Every condition is linked to a particular P&L line that is previously defined. The next step is to define how the condition will be calculated. This is done under "Value", where the process is very similar to the one in P&L setup.

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3 **Assign relevant products and define a time period**

A condition can affect all products, a group of products or a single product. This is managed by linking to different levels of product hierarchy. Moreover, there is a time period where a certain condition can be valid. If you do not edit this period the condition will be in effect for a wrong time period.

For a more detailed walkthrough of trade terms, please read:

ⓘ *Managing trade terms*

Listings

It is now time to link products with customers through listings. BMS supports many ways of working with listings as you can work both from customer and product or import listings Excel files. This sixths step will describe the principles of manual managing of listings, while the import method is described in step one of our guide.

Push the "Customers" button in the top ribbon and select a customer. Follow up with choosing "Listings" in the tree menu to the left.

1 **Add the listings**

Using this approach, you add listings to the customer, and so you have to add a listing for every product you want to be listed on the customer.

2 **Define the listing states**

To provide flexibility and better overview BMS supports using of states. These are configurable through system options and unlimited in their number.

3 **Enter a valid time period**

This function lets you choose a time period, where a particular listing is valid.

Push the "Product list" button in the top ribbon and open a product. Follow up with choosing "Listing" in the tree menu to the left.

1 **Check the customers you want to list the product on**

Add the checkmark next to the customers that list the product.

2 **Edit the listing to adjust states and dates**

Do a right click on an active listing to adjust the listing state and the valid time period.

Find more information in the following quick-guide:

ⓘ *Managing listings*

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Trade promotions

If you have gone through the previous steps and set up your system accordingly, this is where fun begins. This step will cover the basics of managing a life-cycle of promotions.

1   Create a promotion

Click "New promotion" button to create a new promotion.

2   Fill out the promotion header

The top part of the promotion window is called promotion header. Here you enter the basic data about every promotion. Such data includes: customer, state, name, etc. in addition to promotion mechanics. Promotion mechanics help you evaluate and compare promotions in the future.

3   Add products

Add products to the promotion by right-clicking in the "Products" area and selecting "Add products". Note that the products that are available reflect the listing on the customer(s) specified in the promotion header.

4   Forecast and other planning

Plan the details of your promotion by forecasting, adding promotion allowances, discounts, baseline effect, delivery, price etc. Note that the P&L is updated simultaneously after any relevant change of values.

5   Settlement & Evaluation

As the life-cycle of your promotion progresses, these functions become relevant. The settlement and evaluation processes are accessible by using the tabs in the top-right corner of the promotion window. To learn these processes in detail, please turn your attention at the linked quick-guides in the end of this section.

6   Provisions

BMS supports the process of managing provisions by passing them on to your bookkeeping department. Learn all about it in our Quick-guide in the end of this section.

Apart from creating and deleting promotions, the promotion list provides you with functions such as: Copying, Recalculating, Editing and Importing according to the process described in the first step of our guide.

Overview

The Promotion calendar is a strong supplement to your overview. The filters to the left provide a fast segmentation of your promotions by time, customers and promotion mechanics.

Fast functionality

Copying and basic edit of promotions is easy in the calendar view, as you can simply drag and drop promotions and copy them without opening a singe promotion.

Get acquainted with the quick-guides relevant to this section:

- ⓘ *Creating promotions*
- ⓘ *Evaluating promotions*
- ⓘ *Settling promotions*

- ⓘ *Managing provisions*
- ⓘ *Working with promotions*

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Planning boards & Business planning

Business planning in BMS is easy using the Planning boards. A well structured Planning board can be used to plan baseline, forecasts, actuals, returns, other costs, and much more. Planning boards can be further segmented by Sections and Layouts. Sections can be described as product groups and layouts can be described as measures of data displayed in a planning board.

Push the "Planning boards" button and select "managing planning boards"

1   Create a planning board

Right-click in the list area and select "New".

2   Define the planning board

This next step depends heavily on the intended use of the planning board. It is at this point you define the name, period, customers, streams and input type of your planning board. If you feel unsure at this point, please review our demo for inspiration and get more information through our quick-guide in the end of this section.

3   Configure the planning board

Once you created and defined a planning board it is time to configure it. To configure a planning board, you need to open it from the list. Click the wrench in the top-right corner and choose "Board configuration".
To configure a planning board means to divide your products into planning levels that represent your planning routines. BMS supports the following levels: Grand total, Group level 1-3 and a planning mask level. To learn more, read a relevant quick-guide in the end of this section.

4   Edit layout

By editing the layout of a planning board you can manage many different settings. Among others are mask columns, colors, visible values and metrics, targets, streams and more. These settings are generally the same as when you defined the planning boards, but include many more options. To get full insight into planning board options, please use the relevant quick-guide.

NB: Planning boards are a very flexible functionality that can be used to make any sort of business planning easy and efficient. However, to do that you need to be up to date with the possibilities. Please review our demo for inspiration and use the following quick-guides:

ⓘ   *Configuring planning boards*
ⓘ   *Setting up planning boards*

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Dashboards & Reports

The last step of our guide is to set up some useful and automatic dashboards and reports. These can be placed on your default dashboard or saved as a report that can be retrieved at any time. To get some inspiration review our demo, where the "Shared dashboard" presents you with some of the many possibilities possible. Apart from a shared dashboard, any user can create their own dashboard.

Push the "File" button and create a new report

1 **Create a new report**

When you click to create a new report you will get a window, where you can choose a report element you want to add.

2 **Define the element**

Depending on the element you choose, there will be a number of options and settings you can apply to the element. To add more elements, click "add an element" in the top ribbon.

3 **Save the report**

When you are done with placing and adding the elements you want, click "Close edit layout" and push the "Save as" button. The newly created report can be found under "Reports" in the top ribbon.

Note that the procedure of changing the layouts of shared an my dashboards is the same. Furthermore, Microsoft Cube reports are not built in BMS and should be used through Excel. Learn how to use Microsoft Cube through our quick-guide "Connecting to BMS cube". The description above is very brief, so if you want to learn more about each element and how to correctly configure them, use the following guides:

ⓘ *Dashboards & Reports*
ⓘ *Charts*
ⓘ *KPI tables*
ⓘ *P&L*

ⓘ *Traffic light & gauge*
ⓘ *Listing overview*
ⓘ *External link*
ⓘ *Info text*
ⓘ *Connecting to BMS cube*

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Importing master data to BMS

The general file format requirements are thoroughly described in the Import templates Quick-guide, while it is enough to use the import templates for the purposes of this guide. This procedure is identical for all standard data imports available in the system.

Format your data according to templates and follow the steps below to upload

The procedure of formatting your data is thoroughly described in the quick-guide:

ⓘ *Import templates*
ⓘ *Download .xlxs Import templates files*

1 **Open the basic-function bar**

Go to the top middle of BMS browser window and click on the grey arrow to show the basic-functions bar for the application.

2 **Open the upload window**

Click on the icon From PC to server. A new window pops up on the screen.

3 **Select and open your files**

Click on "Click here to select your file" and now you are ready to select and upload files into the system.

ⓘ If you have problems with this process try to use a different browser.

Once data is on our server, you can proceed to the next steps. In the following we have not specified the file we import, as the procedure is general for any master data available for import.

4 **Open the Import window**

Click on the Import icon to open the import window.

5 **Open the drop-down list of uploaded files**

Choose file presents a drop down list. Where you can select the file you want to import. The files existing here are the ones you have uploaded previously from the PC to the server.
Select the file you want to import. You can only select one file at a time. The file is automatically loaded in the window.

6 **Adjust the imported data**

In the Source file template you find the Options field with some options of how you can adjust the file you want to import. Below Options, you have the Preview field, where you can see all changes you make in Options.

7 **Make the field mapping**

Go to Fields mapping tab to configure and match the Source field names with the Destination field names. You can do it simply by clicking on the field in Destination field column next to the name of the Source field column and choose the new name from the drop-down list.

8 **Analyse the file for errors**

Go to the Import tab in order to see the Analysis of the file. In this tab you can see the results of the import and if there are any errors in the data, you will get a message here.

9 **Import the file**

As soon as you are done with the changes, you can click on the Import button and your data will be imported into BMS.

Find Excel pack

You can find the Excel pack three different places: In the e-mail we sent you when you signed up, on our website under Support, and in the BMS application.

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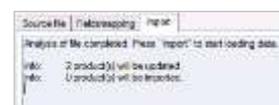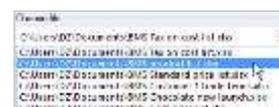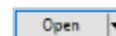
Import templates

The Import templates for BMS are an Excel pack that help you upload and import fast and easy your master data in the database.

The templates have been created with simple yet important fields that need to be enter in BMS in order to create a useful database. For more detailed data import in the database you can make an export of the file you want; then use the exported file as a template for mapping more detailed data import.

All the template files, in order BMS to match the data, need to have the correct *Product Name* and *Product Item number*.

Product list template

The file **BMS Import Template** - **Product list** contains the following column fields.

Item number
1000

The item number representing the specific product

Product name
Shampoo Normal

The name representing the specific product.

Units pr. package
12

The consumer units contained in a package. (number)

EAN consumer unit
5123657895423

The EAN representing a consumer unit of the specific product.

Product Hierarchy Dimension 1 name
Perfect Essence

Product hierarchy dimensions to segment products. (Brand name in our case)

Product Hierarchy Dimension 2 name
Hair Care

Product hierarchy dimensions to segment products. (Sub-Brand name in our case)

For more column fields, go to "Product list" in the application and select "Export". Use the exported file to create your own template.

Product cost price list template

The file **BMS Import Template** - **Product Cost price list** contains the following column fields.

Item number	Product name	Cost	From Date
1000	Shampoo Normal	2,45	20150101

The **Item number** is the same for all files. **Product name** is not a mandatory field as long as the **Item number** is correct.

Cost - is the monetary cost of the specific product. (number)

From Date - is the starting date of the price of this specific product. (date number YYYYMMDD)

For more column fields, go to "Price lists" in the application and select the "Cost prices" and then click "Export". Use the exported file to create your own template.

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Product Standard price list template

The file **BMS Import Template** - **Product Standard price list** contains the following column fields.

Item number	Product name	Gross Price	Retail price	From Date
1000	Shampoo Normal	30	24,95	20170101

The **Item number** and the **From Date** are the same for all files. **Product name** is not a mandatory field as long as the **Item number** is correct.

Gross Price - is the monetary gross price of the specific product. (number)

Retail price - is the monetary retail price of the specific product. (number)

For more column fields, go to "Price lists" in the application and select the "Standard prices" and then click "Export". Use the exported file to create your own template.

Product Tax list template

If you have not included in your cost prices the tax, here you can add it to the database with this file. The file **BMS Import Template** - **Product Standard price list** contains the following column fields.

Item number	Product name	Tax 1	From Date
1000	Shampoo Normal	2,5	20150101

The **Item number** and the **From Date** are the same for all files. **Product name** is not a mandatory field as long as the **Item number** is correct.

Tax - is the monetary total cost of taxes on the specific product. (number)

For more column fields, go to "Price lists" in the application and select the "Taxes" and then click "Export". Use the exported file to create your own template.

Trade terms (conditions) list template

The file **BMS Import Template** - **Trade terms & conditions list** contains the following column fields.

Account	Product Hierarchy Dimension 1 name	Product Hierarchy Dimension 2 name	Value
Joint Marketing %	Perfect Essence		1,5
Contract Discount %			5
Joint Marketing %		Hair Care	1
Other Discount %			5
Other Discount %			7,5
Joint Marketing %			5,5
Joint Marketing %			6,5
Joint Marketing %			7,5

The **Product Hierarchy Dimension names** are the same for all files.

Account - is the name defining the condition. It needs to fit the name with the P&L setup in System Options.

Value - the percentage value of the condition. (number)

The product hierarchy dimension columns serve the purpose of allocating special conditions that follow specific brands and products.

For more column fields, go to "Customers" in the application and select to open one, then click "Trade terms" on the tree menu and click "Export". Use the exported file to create your own template.

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Thank you for reading the guide

We hope now you have a better understanding of what BMS can do for you and your company. It's an easy to use, and yet powerfull tool to handle your business planning and trade promotion activities. You don't need to use all functions, but you can select the functionalities that makes most sense for your company.

Please use the two-month free trial to get familiar with BMS and experience the system. This is the best way to decide if BMS lives up to your expectations.

If you decide to implement BMS, you can continue using the set-up you have created or you can get a new ready-to-build system.

Try BMS yourself, and if you are in doubt of anything, read our Quick guides and if you cannot find what you are looking for in these, you can contact our support at:
Email: **support@effectmakers.com**
Tel: **+45 70605080**

We hope you enjoy your experience and choose to work with us soon.

Best Regards,
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