Quick guide for BMS

Managing listings

Introduction

This Quick guide will show you how to add listings. The data that needs to be filled in is; customer item number, listing state and trade terms. In the end you can indicate your ability to sell your products to the customer.

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.

On the last page it is described how to set up the Security to activate, view and edit the described tool.

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

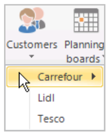
Tips and tricks are marked with an Info-icon.

Questions & Answers note relevant to the topic at hand.

Add listings manually

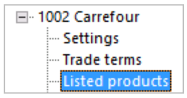
1 Select a customer

Click on the *Customers* icon to select a customer.



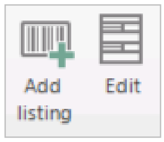
2 Go to Listed products node

Click on *Listed products* in the left navigation panel.



3 Add listing(s)

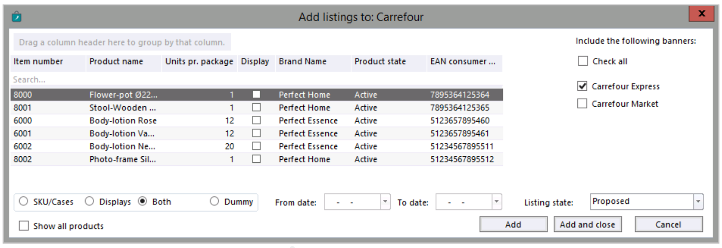
In order to start, click on Add listing in the ribbon.



Select the listing you want to add and click on Add and close or Add, if you want to add several listings step by step.

To add the needed listings at once, simply select the listings you want and click on Add and close.

BMS will assign the default listing states to the products you added. These can be adjusted by selecting a product and using the Edit function in the ribbon.



If you add a listing on a top level customer, you can include different banners on your listings.
Click on Check all to select all banners for the listing, or mark the banners separately to include them.

BMS allows you to select From and To dates and Listing states directly in the Add listing window.

There is a flexible add or delete functionality for the underlying banners. You can select one or more lines and Right-click to edit the listed products from the Add to banner or Delete listing(s) options.

Listing states and dates have acquired from bottom to the top logics. This means that the changes in listing states and dates on banner levels automatically update the equivalent fields on top-level.

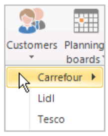
Quick guide for BMS

Import listings

Another option for adding listings is for you to import listing information from an external Excel file.

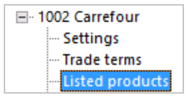
1 Select a customer

Click on Customers (icon in ribbon) – select customer.



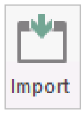
2 Go to Listed products node

Select Listed products in the left navigation pane and click the product.



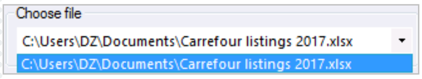
3 Open the Import window

Click Import in the ribbon to import products for your listing.



4 Select file

Below Choose file, select a file you want to import to the listing in the drop-down list.
Follow the Import steps *(See at: Upload to BMS cloud Quick Guide)* and Import your listings.

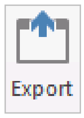


You can overwrite already existing listings by importing.

Export listings

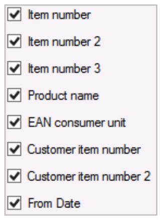
1 Export listings

Click Export in the ribbon to export the listings to your computer. By doing this, you can import it again later as a template for future use.



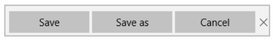
2 Select the data for export

In the pop-up window, check the elements you want to export and click Export.



3 Save the listing file

Now you can select what to do with the document. This looks different depending on your browser. (Here we use Microsoft Edge).
Click Save to select a folder where you want to save the listing, and now you have to save it like you save any other document on your computer.



Quick guide for BMS

Edit listings manually

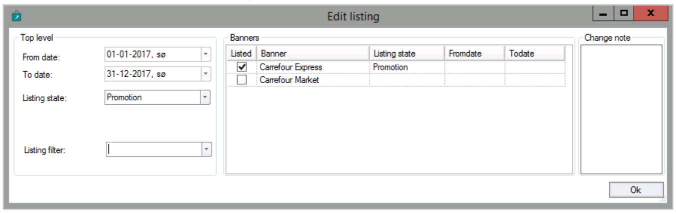
1 Open the Edit listings window

Click on the Edit icon in the ribbon.

2 Choose the field(s) you want to edit

The fields available here are: From and To dates, Listing state, Trade Terms and Listing filter.

If you are working with a top level customer, you are able to work with your banners in the editing window.

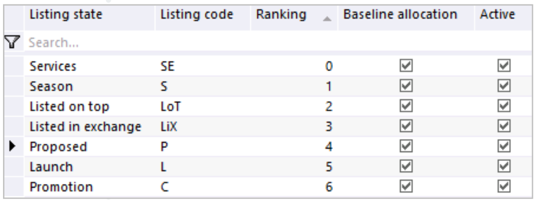


3 Finish editing

When you are done editing the fields of interest, click on Ok and the system will save the changes.

Listing ranks

The different listing states are ranked. The logic behind is that the top level customers follow the listing states of its banners. The top level customer will get the same listing state as the banner with the highest ranked listing state (lowest number).
For instance, based on the example in the picture, if both top level customer and all banners have the listing state launch, and now you change one of the banners to listed on top, the top level customer will also get that listing state.
You can configure the different listing states and their ranks in System options in Listing states in the menu to the left.

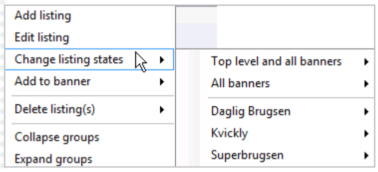


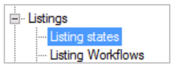
Listing state	Listing code	Ranking	Baseline allocation	Active
Services	SE	0	☑	☑
Season	S	1	☑	☑
Listed on top	LoT	2	☑	☑
Listed in exchange	LiX	3	☑	☑
Proposed	P	4	☑	☑
Launch	L	5	☑	☑
Promotion	C	6	☑	☑

Edit listing states

In order to edit listing states for listings, you have two options. The first is, when you click Edit. Here you have the option of selecting a listing state as previously mentioned.

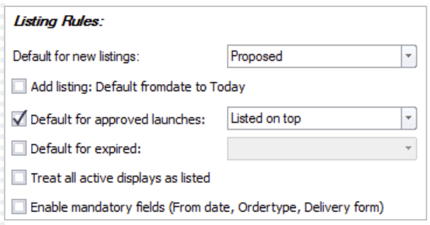
Also, you can right-click any listing in the table and select Change listing states. Here you can choose what listing states, you want for the listing.





Listing rules: Mandatory fields

In order to make sure all mandatory details have been filled in, there is an option in BMS to *Enable mandatory fields.* Go to *File -> System Options -> Listings -> Listing states*



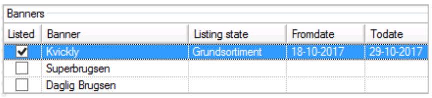
Listing workflows

The workflows are also company-defined and unlimited in their number, but they only apply to Spaces. Every workflow is connected to a certain listing state. This means that when you have a space connected to a customer (top-level or banner) and you define a workflow for the space, the system will assign the connected listing state to that customer.

In order to use this function, you need to define the workflows and have the Automatically update workflows function enabled in the System options under Listing workflows.

Add to banner

If you are in a listing state for a top-level customer, you can add different banner level customers to this. To do this, you have two options.

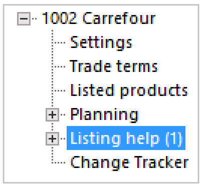


First, you can click Edit, and in the pop-up window, you can put a check mark for the banners, you want to include for this particular product. Here you can also set From and To dates for the different banners. This is efficient, if you select more products at the time, but you can also use the Edit functionality, if you only edit one product.

Maintaining listings

Listing help

Listings help is a feature that helps the account manager to maintain listings and avoid inconsistency.



The inconstancies can happen when:

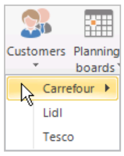
- The actual sales data contains sales on a product that is not listed on the customer
- A KAM has a forecast on a product, but then later delists it intentionally or unintentionally
- There are listed products without any recent sales. The sales data comes from actual sales

Whenever there is a problem, the system will highlight the listing help function using red color.

Listing help

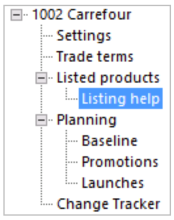
1 Select a customer

Click on Customers (icon in ribbon) – select customer.

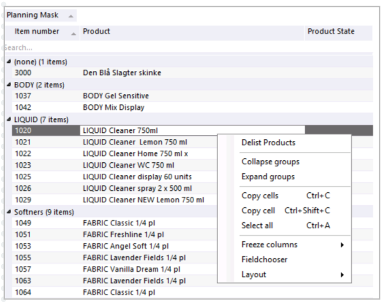


2 Locate the Listing help

The Listing help function is located in the navigation panel.



3 Identify the suggestions from BMS



Listed products without sales:

If there are any products listed here, it means that the system tells the KAM that there are products listed on the customer, but without any sales. The system then suggests to delist the products on the list.

Sales on non-listed products:

This list contains all the products that are being sold according to the actual sales data, but are not listed on the customer. The system suggests to list the products.

Forecast without listing:

Analogously here you have a list of products that are not listed on the customer, but have forecast on them. The system suggests to list the products.

Managing listings

Questions & Answers

What is the difference between a Product state and a Listing state?	The difference between the two statuses is that a product state refers to the status of a product at the warehouse, while a listing state refers to the status of a product with the customer.
Why do I miss some of my listings?	Go to In effect, click the arrow, and select Clear. Then it shows all of your listings, no matter from and to date.
How do I delist?	Right-click on the chosen listing and select Delete listing.