Configuring baseline planning groups

Introduction

This Quick guide will show you how to setup baseline planning groups.

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.

In BMS you can plan your baseline on different levels: by SKU pr. customer, brand by customer or total baseline by customer.
Configuration of the planning groups is where you define the input-planning masks that the users will have for inputting baseline for the customers.

Before you start setting up the planning hierarchy you should prepare a draft and discuss the impact on your organization with the sales management team.

Planning all your customers on SKU level by week may seem to be the most accurate way of planning. However, if the workload of planning gets too high, it will most likely reduce the quality of the planning. So, in general, you need to consider a number of factors before deciding on the planning hierarchy:

- How many people will do baseline planning and how much time can they spend?
- How is the split of customers between the employees who will do the planning? The levels of planning can de defined differently for each customer or group of customers.
- Do you have groups of products that follow a consistent split between variants? In that case it may be better to plan them as a group and let BMS do a split to SKU level based past actual sales.

The structure of the planning hierarchy is as follows:
Sections: This is the top level and is used for generating the navigation menu in the baseline window.
Planning groups: Grouping input lines. Can be used for display sub-totals in the baseline window.
Planning levels: This level is invisible to the users – however, this is where you can assign different sets of input masks to different customers. If you add/remove levels you always need to pay attention to the customer's assignment to levels.

Planning masks: This is where you define the input-rows in which the user enters the baseline. Notes:

- Default behavior for a mask is to generate one input line and allocate the input to all SKU's as per rules below, based on listings states, time and product states.
- Other option is to define it as "Split by SKU". The system will generate one input mask for each listed product that belongs to the customer.
- Display: makes it possible to generate an input mask for inputting the forecast of a display (follows the same rules as defined for displays on promotions).
- Rules: The rules define which products belong to the planning masks. The rules are based on the product hierarchy dimensions 1-9 and specific products. Rules can either include or exclude products.

One thing to remember about the rules is, that one product can only belong to one mask per customer. However, if the rule is defined in a way that more than one rule applies to the same product, BMS will always assign it to the first mask from the top. In other words, the order of the masks controls the appearance and the logic of linking products together within the masks. Use the "exclude" mode of the rules to manage a specific sort order of the rules. This way simply exclude the products from the first mask – then they will be assigned to the next in the sequence from the top.
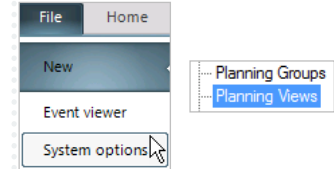
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If the column Listing Filter is not in the table: Right-click and choose Field Chooser.
In Field Chooser: Find Listing Filter and pull this to the headline of the table.
Right-click in the table/ Layout/Save to save the layout.

Set up Planning views

In BMS the Planning Views give user different views to work with the baseline. In the views the window layout can be different and in order to give the user flexibility to plan baseline in different ways. For example, have a full detailed view of the current month, or have a simplified view to start working on the next year´s planning.

1 Open Planning views set up window

Click *File* and *System options* on the top left menu. A new window will open and from the tree menu on the left select the *Planning Views* option to open it in the window.
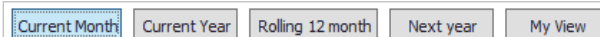
2 Define planning views set up

From the *Settings* you can choose the type of values in which the user can plan baseline– SKU, sales units or by KG.
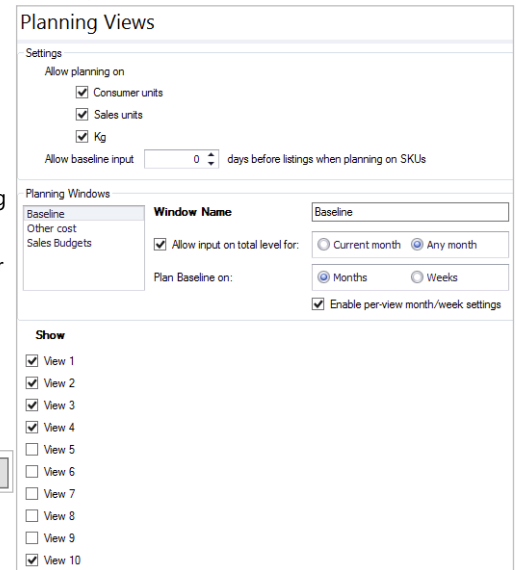
Allow baseline input X days before listings when planning on SKUs defines how many days in advance you can start planning baseline on products listed in the future.

In *Planning Windows* you can select which windows to have for planning, define the name, timeframe for input on total level (current month or any month), and planning frequency- by months or weeks.

In the *Show* you can choose to activate how many views you want to have.
This will give you the following result:

When the set up is finalized, just close the *System Options* window and settings will be saved automatically.
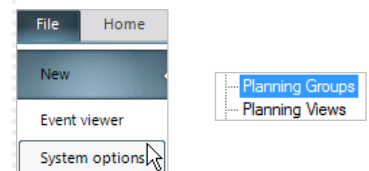
Set up planning groups

Planning Groups provide user with different planning sections to work with the baseline. Sections can be defined as different product groups, where the window set up can differ too. This way user has the flexibility to plan baseline in different ways for every group of products.

Here user defines if the baseline planning will be done individually per SKUs or on total level per SKU groups. For example, have some high volume products planned per SKU and some low volume products planned on SKU group level.
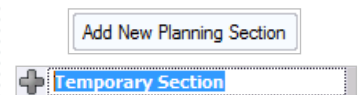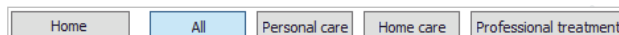
1 Open Planning Groups set up window

Click *File* and *System options* on the top left menu. A new window will open and from the tree menu on the left select the *Planning Groups* option to open it in the window.
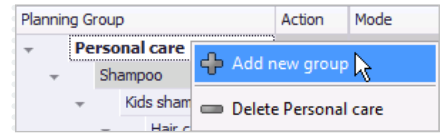
2 Add a planning section

Add a planning section for your planning groups. Click *Add New Planning Section*, a new line will be created where you can enter a name for the section.

Every planning section you add you will get the following in baseline window:
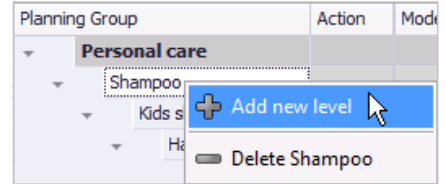
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3 Add a planning group

The planning group is one level below the planning section. Select the planning section you want to create a planning group and right-click on the planning section and select *Add new group*. A new sub line will be created where you can edit the name.

4 Add a planning level

The planning level is one level below the planning group. Select the planning group you want to create a planning level and right-click on the planning group and select *Add new level*. A new sub line will be created where you can edit the name.
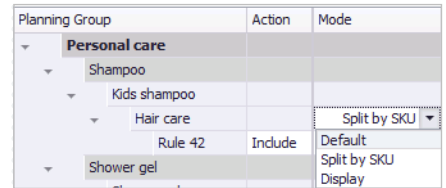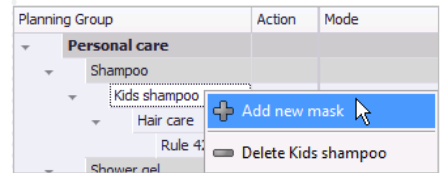
NB! On this level you assign the customers. So, every time you add/edit this level you should always go to *Assign Customers* and edit.

5 Add a planning mask

The planning mask is one level below the planning level. Select the planning level you want to create a planning mask and right-click on the planning level and select Add new mask. A new sub line will be created where you can edit the name.

On the Planning mask line you have the option to select *Mode*. *Mode* defines how the products will be grouped in the next rule you will create: *Default, Split by SKU* or compose a *Display*.
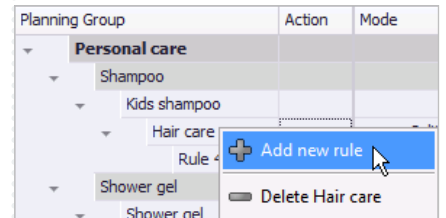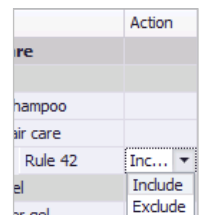
6 Add a rule

The rule is one level below the planning mask and the level where the included products will be defined. Select the planning mask you want to create a rule and right-click on the planning mask and select Add new rule. A new sub line will be created with a unique Rule ID number.

On the rule you have to select the action, *Include* for including the products you will define in the line, or, *Exclude* for excluding products you will define in the line.

On the line of the specific rule you need to select to assign products. The options are based on the product dimension hierarchies you set up in the system and also you can select single products. Click on the corresponding cell and find the selection from the drop down list.

	Action	Mode	Brand Name	Product Type	Category	Target Market	Target Group	Product
re								
ampoo								
r care		Split by SKU						
Rule 42	Include			97745 Hair Care				

7 Assign customers

When you are done with the set up of the planning sections you can assign the customers to the planning section by clicking Assign Customers in the upper right corner of the window.

The window view will change to display Planning groups down to the level of planning masks in row and customers in columns

Assign Customers

Planning Group		Carrefour	Carrefour ...	Carrefour ...	Lidl	Tesco
Personal care						
▾ Shampoo						
Kids shampoo		✓	✓	✓	✓	✓	✓
▾ Shower gel						
Shower gel		✓	✓	✓	✓	✓	✓
▾ Body cream						
Body cream		✓	✓	✓	✓	✓	✓

Check the first box next to a planning level to choose all customers, or, choose one by one to select only the customers that you want to plan baseline with the specific planning group.

8 Apply changes

Click *Apply Changes* above the table when you are done adding the Planning Groups.

NB! Depending on the changes you did, this might take a while to apply the changes to the system.

Apply Changes

ⓘ Show preview

When the changes are saved you can see which products match the rules belonging to a mask, by clicking the mask and then click *Show Preview* in the bottom of the window.

Show Preview

Maintain Planning groups

ⓘ Move lines

You can change structure of the lines by selecting a line and click *Move Up* or *Move Down* in the right side of the window to move it to where you want it.

Move Up

Move Down

ⓘ Delete lines

You can delete lines by selecting the line you want to remove and right -click selecting "Delete X-name".

NB! When deleting a line with sub-lines, everything will be deleted from the lower levels.

Delete Personal care

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Can I set up planning hierarchy for reporting?

Yes. All data will be displayed in accordance with the planning hierarchy no matter which stream & scenario they are coming from.