Quick guide for BMS

Introduction

This Quick guide will show you how to setup and work with baseline planning windows layouts.

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.

Working with baseline layout

In BMS to start working with Baseline planning, first you have to set up the planning layout of the window and define the Planning Groups from the System options.

NB! When you work with the definition and the baseline planning windows set up, make sure that no other user is planning baseline or editing settings at that moment .

Edit baseline window layout



From the top navigation ribbon find *Customers* icon and click to open the list and choose the customer you want to work with baseline.

Mostly baseline planning is done on the top level customers. In the menu to the left, find Baseline under Planning.

2 Edit layout

Click the *Edit Layout* from the top navigation ribbon to open the setup of the baseline window.

A new tab window opens.

Home All Per	sonal care									ent Month Current Yea			My Vie	
Streams	View Name						Options			Totals Options	<u>is</u> ¥		>	
🖌 Pred. Baseline	Current Mont	h					 Allow input in 	n the past		Customer Totals	Group Totals			
Baseline Additional Forecast Promotion Launch	Period View Type	Current Year	▼ From 01	-01-2019	- To 31-1	2-2019	T O Mor	athe O	Weeks	⊙ Top O Bottom	⊙ Top ○ Bottom			
Other cost					10 000				WEEKS	Vear Totals	Unallocated			
Cannibalization Total Stream (no returns) Returns Total Stream	Column Op Columns	Totals Columns								⊙ Left Side ○ Right Side	⊙ Top O Bottom			
Sell-out actual Actual CY		Actual Y-1	Forecast	Actual	YTD + YTG	Open	Actual + Open	Achieved %	Remainder	Section Totals	Freeze Year/Peri	d Totals		
Actual LY Sell-out estimate	Units/Value	\checkmark	\checkmark	\checkmark						⊙ Top O Bottom				
	Gross Sale									Period Totals				
Listing filters Special Day	Invoice Sale									O Left Side				
Summer Season Winter Season	Net Sale									⊙ Right Side				
	Sales Margin													

3 Edit view name

4

In the *View Name* field you can enter the name for this specific view.

Find how to define the Views in the following pages.



Customers

Carrefour

Lidl

Tesco

⊡· 1002 Carrefour

Settings Trade terms

Listed products

Ba

D

Edit

Listing help Planning

Promotions

Launches

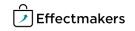
Change Tracker

In *Options* mark the checkbox *Allow input in the past*, if you want to allow edit in the past periods.

Recommended only when you start up the first time with baseline planning and need to add historic values.

Options

							-						-	-	
	Al	lo	W	in	p	ut	ir	n	tł	ne	P)a	IS	t	



Quick guide for BMS

Choose planning period 4

In the Period fields you can define what time period will be displayed in this specific planning view and you can select how you will forecast your baseline - by month or by week.

	Period												
	View Type	Current Month	▼ From	01-10-2018	*	То	04-11-2018		\bigcirc	Months	0		
		do your plannii be in monthly											
will be in wee								View T	ype	Current Mo	onth 💌		
									ľ	User Defin	ed		
	<i></i>					c.				Current Mo	onth		
		rop down list a								Next Mont			
	select User	Defined and us	se the F	rom-10 date	s to c	letin	ie			Current Ye			
the period.	the period.									Next Year 12 Months			
								Stream		ine			
								✓ Pred. ✓ Basel		ine			
5 Cho	ose the S	Streams								orecast			
								Prom	otion				
		t options of da	ta to dis	splay in the r	ows o	of th	ie i	Launch					
baseline wind	low.							Other cost					
								Cannibalization					
		eams you want	to be c	displayed in t	IC	Total Stream (no returns)							
baseline view.									Returns				
To plan basel	ine you hav	a to salact the	Bacolino	stream					out act				
To plan baseline you have to select the Baseline stream.								Actual CY					
								Actual LY					



7

Choose columns

In Column Options you can define what you want to see in the columns of your baseline view. You can define what you want to see in main window's Columns and in the Total Columns by clicking the corresponding tab to view.

To plan baseline you have to select the Forecast in Units/Value.

Column O	ptions							
Columns	Totals Columns							
	Actual Y-1	Forecast	Actual	YTD + YTG	Open	Actual + Open	Achieved %	Remainder
Units/Value		\checkmark	\checkmark					
Gross Sale								
Invoice Sale								
Net Sale		\checkmark	\checkmark					
Sales Margir								

Define where to place the totals

In Total Options choose which totals you want to be displayed in the baseline and where you want them to be placed, on top or in the bot-tom of the window. Mark the checkbox to activate the option and select where to place the total.

Totals Options	
Customer Totals	Group Totals
⊙ Top ⊖ Bottom	⊙ Top O Bottom
Vear Totals	
⊙ Left Side ○ Right Side	O Top ⊙ Bottom
Section Totals	Freeze Year/Period Totals
⊙ Top O Bottom	
Period Totals	
O Left Side ⊙ Right Side	



Quick guide for BMS



When you have finalized the setup of your layout, you need to save it. You have different options for this.

- 1. Click *Save Layout* on the ribbon to save and get back to the baseline view. The layout will be saved only for your user.
- Click Save As Default Layout. This will save the layout as a default layout for the specific baseline view for future users of the system.
- 3. Click *Load Default Layout* to overwrite the current layout. This will use the latest default layout to overwrite the layout set up.



Save As Default Layout Load Default Layout

Share layout set up with other users



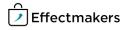
Share layout set up

If you want to share the layout set up with other users, you can do this in Security.

Save the layout as default layout (check previous section) and go to File/Security/Users. Select the user(s) you want to copy the layout set up and click the button at the bottom "Copy my settings to selected users" to share the layout as their default layout.

NB! This can be done only by the super users who have the access to security settings.





BMS	Quick	guide		

Working with baseline layout

Questions & Answers



Can I plan on SKUs?

Yes, set it up in system configuration.