



# BMS Features List

Trade Promotion Management & Optimization

Customer Business Planning

# Trade Promotion Management and Optimization

## Create promotions

Create promotions on the customer or banner level

Define promotional tactics with customizable pick lists for promotion purposes, type and media

Make your own workflows with customizable promotion states

Add products by choosing individually chosen SKUs or displays to promotions in one operation Default restriction to listed products, but optionally override to choose between all products

Add products by product hierarchy groups or predefined promotion groups

Enter volume forecasts by product or let BMS allocate a total input down to SKUs by allocation rules

Promote names and notes for collaboration, e.g. messages to the sales force

Automatically generate promotion letters for your customers based on your own Excel templates

Color code by the brand

## Copy, move, and update promotions

Copy a promotion from a promotional window, promotion list or promotion calendar

Move a promotion in the promotion calendar with drag and drop

Support for product replacement process is provided by replacing SKUs or reallocating forecast if promotion groups are changed. This can be done on multiple promotions in one simple operation

Mass update promotion state, tactics and delivery profiles are given

When a promotion is changed, the impact on forecast and P&L is calculated in realtime

## Pre-evaluation of promotions

Fully customized P&L is provided for total promotion and individual products

Offered promo KPIs: ROI, Net uplift, Trade margin, Total investment %, and Gross to net %

Traffic light indicators of profitability are supplied

Automatic calculation of the Trade margin is provided

At the time of the creation, the full promotion of the P&L including allowance is available for analysis and reporting



## Post-evaluation and settlement

Enter the actual sales figures as sell in and/or sell out

Automatic calculation of the actual P&L from sell in and/or sell out is provided

Compare the actual P&L with the forecasted P&L and make your evaluation notes to capture what you have learned

Supports your settlement process with the promotion state, customer invoice number, and payment state

Prepares custom integration into your payment system

An option is provided to calculate the unpaid allowances for past unsettled promotions to have an exact estimate and risk assessment

Automatically changes the promotional state from "Planned" to "Settled"

## Promotion forecast

There is a promotion forecast per SKU and/or displays per delivery week - real-time is available for the supply chain

Enter a forecast per product or let BMS allocate a total forecast based on allocation keys

Listings secure promotion planning to authorized products only

A delivery profile is automatically inherited from the customer to match typical purchase preferences. This can be adjusted on each promotion

There is a delivery profile in percent per week or for specific delivery dates

Weeks across months can be allocated 100% on Monday or split by 5 or 7 days

Delivery settings are supplied in percent per week with an automatic split on weeks across months or the option to set specific dates

You can easily modify delivery percentages to match specific numbers or actual deliveries

## Promotion overview

Promotion calendars are generated with graphic overview promotions as a day-level calendar

Promotion lists are provided with key figures, KPIs, and filtering, sorting, and search capabilities

Make individual lists to support the way you work

A promotion list is also shown on each product and customer for easy access to promotions

Color code for promotions (by brand)

A traffic light profit indicator is provided

Export promotion lists to Excel with one click

## Optimize promotions

Full access to past promotions are supplied at the time of creation of a new promotion. The promotion history is shown as a graph in the promo window

Pre-and post promotional P&L and capture notes for understanding

Analyze and define cannibalization and the halo effect

Promotion analysis is provided with ranking and bubble analysis

Analyse promotions in the Promotion list by setting up customized views to show preferred KPIs

## Promotion allowance

Input 2 different variable costs per product on the invoice as an amount per unit or % of sales

Input 1 variable cost per product on the invoice as an amount or % of sales

The variable allowances can be reduced/lifted by a factor if, individually, you expect a bill-back not to match the forecasted number of units

Input multiple fixed allowances which can be allocated to specific products, brands or automatically to all products

All allowance is automatically accounted for according to the delivery profile

You always have a correct picture of your promotion spending-open and future promotions

## Promotion reporting

Promotion data can be included in reports as tables, P&L views or graphs

Promotion ranking reports are provided

Include a promotion bubble diagram in your reports

All data is available in the Microsoft Analysis Server as a cube to use for Excel pivot reporting

## System integration

Integrate the planned promotion volume into your supply chain system

Integrate the promotion plan into your fields sales system



# Customer Business Planning

## Bottom up plan with full P&L

Promotions & other trade costs

Baseline

Launches

Returns

Everything is planned directly on SKUs or allocated down to the SKU by BMS allocation rules

## Trade terms and P&L

Valorization of all the planned units ends up the same as those in a full commercial P&L

Actuals can be loaded with the same full P&L to have an updated rolling estimate in BMS

The P&L is customizable from gross sales down to sales margins with all accounts and sums

Trade terms can be done on flexible levels from the SKU and product hierarchy to total customer

Trade terms are applied automatically or set specifically to each product by the listings

Trade terms can be on the customer or banner level

Trade terms are time bound, and valorization will use the trade term valid on the delivery dates

## Baseline planning

A baseline is planned for each customer or banner

Planning levels are defined centrally – they can be brand, sub-brand or a group of SKUs

The unit input is real time valorized into a full P&L on listed SKUs by the use of allocation keys and trade terms

In the planning windows, you can directly include gross, invoice, and net sales, as well as the sales margin

Planning results are shown from the customer total down through 4 levels to the input mask – and further by drilling down to the SKU levels. Columns for totals can be set up independent of the input area

Suggested baselines are based on historic sales with an advanced model that splits actual sales into promotion, launch, returns, & baselines

Type in the forecasted units or use smart-update functions to insert a prediction or a trend you define

Supporting information and KPIs are available, integrated in the screen for an improved forecast quality. For Example: Y-1; predicted baseline, open orders, and sell-out units

Integrated graphics for spotting trends two years back on any level or to compare with last year

You can also plan your returns in the same window

## Flexible planning window

With a few clicks you can set up the planning window to suit personal or company-wide needs

Up to 10 different planning views for different planning horizons are provided, i.e. current month, next month, current year, next year, and a rolling 12 months

Views can be managed centrally

Customize planning levels to the company's needs with rules that the group's products are based on the product hierarchy or individual SKUs

Planning levels can be customized to different types of customers e.g. detailed levels for large customer; less detailed for smaller customers

## Product listings

Listings are used for overview, customer specific pricelists and to ensure that planning is based on customer authorized products only

You can maintain listings bottom-up from banners to the customers

You can maintain listings top down from the wholesaler to banners or even across customers in one go for central listing management

Each listing has listing states from a customizable picklist

2 different customer item numbers are provided for each listed product

Recommended retail prices for each listed product (or globally shared for all customers)

Mass updating of listing states are provided for easy maintenance

Create and list new products in BMS even before they are created in your ERP system

Action lists that help to adjust the listings and are planning based on actual sales. One click will list or de-list

## Launch planning

Centrally managed launch templates per SKU. Each template can cover multiple customers

Import launch templates from Excel

The launch period is from 1 to 6 months

The launch volume is split into a pipeline month and the following 5 months

KAM can adjust volumes and timing prior to approval for their customers

Approved launch products will be listed automatically

BMS stores both the original volume suggestions and the volume approved by the KAM



## Other costs planning

(costs not related to planned volume)

Up to 10 different views for lump-sum planning of promotion allowances or other P&L accounts are provided for each customer

The same user interface is used as the one for the baseline window

Input is allocated down to the SKU per week in the same way as the baseline

Planned value is in real time and included in the P&L valorization

These allowances have no impact on the volume forecast

## Price lists

Each customer has a predefined pricelist view, based on the listings and the trade terms and graphical presentation of price and condition changes

Historical prices are integrated as graphics for SKUs or the average of selected SKU to offer an easy way to check the configuration and price changes

The pricelist can be exported with your own Excel templates in a DTP-like format for your clients

## Rolling estimate

A rolling estimate with the sum of actual sales year-to-date and year-to-go plan is in BMS

The estimate is always up-to-date when planning is adjusted or new actuals are uploaded

The estimate includes the full P&L lines in total or split into promotion, baseline, returns, and launches

## Carry over management

An automatic calculation of the carry over balance (forecasted units minus actually delivered) for promotion displays is offered

With one click you can open the promotion to adjust the future forecast of the delivery time

## Security

Use an integrated Windows login: log in with same credentials as logging in to the computer

Unlimited number of user roles, e.g. Key Account Manager; Demand planner; Controller

Define each role's access to different functionalities in BMS

Define each role's rights to access, edit, update, and delete information

Restrict access to specific customer(s) for each user

Allow admins to impersonate any user for support issues related to user-specific configurations

There is a full revision track on all data

# Reporting & Analysis

## Dashboards & built-in reporting

A company shared dashboard is always shown on the front page to ensure a common understanding on your business temperature. The dashboard is easily customized by your super users

My Dashboard gives each user a fully customizable personal dashboard with a quick-access button

The built-in report generator is made for business people - No programming skills are required

All planning data is available in real time

Dashboards and reports are built by using the same technology, based on predefined report items

A built-in tutorial is provided to learn reporting in minutes

Reports are using a unique aggregation technology to render reports in seconds, no matter the size of your business

Share reports with co-workers or make personal reports

Predefined items are available as follows:

- P&L by customer, products, time, and/or data streams

- Table layout for showing key figures by customers and products

- KPIs panels: traffic lights and gauges

- Charts as bars, splines, and lines

- Promotion Ranking

- Promotion Overview

- Promotion Analysis by bubble diagramming

- Accruals

- Listing & distribution

- Forecasts

- Information texts

- External link to information

- Planning quality

Each report item contains a separate user-friendly customization window for choosing data, layout and filters etc.

You can build unlimited numbers of reports

Export tables to Excel

## Report packs

Download predefined report packs to suit different business needs

Save and load report configurations from files to move reports or report packs between systems



# Technical features

## Microsoft Analysis Cube

Make your own reports and analysis with Microsoft Excel or any 3rd party reporting tools

All data in BMS is available to allow for advanced reporting and business intelligence

Fully documented and organized according to your own P&L and terminology

Using the Cube you get extremely fast reporting on big data

The Cube is updated every 5 minutes

## Integration

BMS contains the following standard ERP input interfaces:

- Products
- Displays
- Gross prices
- Cost prices
- Taxes
- Actual sales

BMS contains the following standard output interfaces:

- Forecast (SKU and displays)
- Field sales (promotions and listing with prices)
- Temporary price reductions for promotion discounts on the invoice

We offer custom development of interfaces

## Hierarchies & master data

The product master data contains all common properties and a 9-dimension hierarchy

Flexible rule-based planning hierarchy allows you to plan for the details you want and keep the convenience of a strict product hierarchy

Customers can be related on wholesaler/banner relationships for integrated planning

Customers can be reported in groups for automatic reporting aggregation for regional or purchasing structures etc.

Gross prices, cost price, taxes and trade terms are time bound



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Effectmakers ApS

Flæsketorvet 68, 1.  
1711 Copenhagen V  
DK-Denmark

Phone: +45 70 60 50 80

Mail: [support@effectmakers.com](mailto:support@effectmakers.com)

[www.effectmakers.com](http://www.effectmakers.com)