

EFFECTMAKERS BMS

Promotion Starter for CatMan

GETTING STARTED GUIDE

CREATE PRODUCTS

CREATE CUSTOMERS

CREATE LISTINGS AND INVOICE PRICES

CREATE PROMOTIONS



Effectmakers

INTRODUCTION

Welcome to the Promotion Starter for CatMan

Promotion Starter for CatMan is a downscaled edition of Effectmakers BMS and is targeted at CatMan Solution users only. The software provides an easy promotion planning and upload to CatMan Solution.

The Getting started guide is divided into sections;

The first sections show how you set up BMS and create a basic promotion.

- Product
- Customer
- Listings and Invoice prices
- Promotion

The next section will provide you with additional useful information about functionality.

- System maintenance

Each section will, step by step, take you through the actions needed in order to understand the process and the setup of the promotion. Relevant screenshots for easy navigation and quick overview are provided on the right side of the document. The grey bar to the left is for important notes and information.

After finishing this guide, you will be able to create promotions by yourself and have a solid understanding of how the software works.

If you should encounter any problems, you can contact our DK/UK support on support@effectmakers.com

At the end of the guide we have added a small teaser telling which other benefits and features you will get if you upgrade BMS to the full version.

Enjoy

Effectmakers
Copenhagen 2017



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



Tips and tricks are marked with an Info icon.

How to Login



BMS Promotion Starter is a cloud solution where you login to the Effectmakers server.

Effectmakers validate and send your access codes directly to your e-mail.

Have you not received your access codes, please contact your BMS administrator or support@effectmakers.com

- 1 Open your browser and go to www.effectmakers.com.
The **"Login"** button is located in the upper-right corner. Click on it and a new page will open.
- 2 The new page shows there are two ways to login to BMS - dependent on the program version you are running.
Click on the **BMS Promotion Starter for CatMan** edition.
- 3 Enter **"User Name"** and **"Password"**. To continue click **"Log on"** or press **"Enter"** on your keyboard.
- 4 Select the BMS version you use by clicking on its icon and the next window will open. Select BMS 15.5
- 5 Type the **"Database"** name you are using in order to continue and login.
Once you have entered the Database name, click on the **"Arrow"** or press **"Enter"**.

Login



BMS v. 15.5

BMS Promotion Starter for CatMan



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BMS Login

User name:

Password:

Log on

BMS 15.5

Login

☒ Windows integrated login

Database

Keyboard

Version 15.5.2.10



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- 6 The BMS program opens and the start screen shows 4 icons at the top bar. You are now ready to start.



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PRODUCTS

This section describes how you setup products in BMS. You create a new product by entering all necessary information or by importing an existing product/product list from your existing ERP system in the form of EXCEL files.

CREATE PRODUCTS



On the Left, a new list has been shown with the options of "Master data", "Listing", "Promotion" and "Cost".



What is a "Dummy" product? "Dummy" products are products that do not exist in ERP's yet. "Dummy" products can be created in BMS by just creating a new product with no information at all.



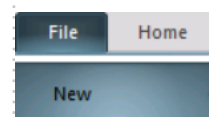
From the first moment you create a new product it is automatically saved in the system's product list, even if you do not enter any information about the product. This happens for every new creation in the system, as it automatically creates an "ID" for it. Thus, you can always have a "Dummy" product, where you can update the information about.

You create a new product by entering all necessary information into BMS or by importing from an EXCEL file.

The optimal way to create your products in BMS is to create one product manually, export it as an EXCEL file and then mapping the template and use it to import all of your products.

Creating product in BMS

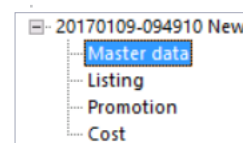
- 1 Click on the **"File"** icon on the upper left corner and click on **"New"** icon below.
- 2 Click on **"Product"** icon. A new tab will be created and now you are ready to start customizing your new Product's information.



Master data

Here you add information about your product. You must fill in as many fields as possible, in order to create a product. Otherwise, the product will be considered as a **"Dummy"** product.

- 1 Click on **"Master Data"** in the list to the left. Now you have opened a new tab and you are ready to start entering your product's information.



2

Start typing information:

"ID": Product ID is generated by BMS and is unique for each product created.

"Hidden": Check or uncheck the box to either hide or show the product by default on the product list.

"Display": Check or uncheck the box to indicate, whether the product is on a display or not.

"Product Name": It is the name/title of the product.

"Item Number": It is the product's unique item number, which is also the key that can link the product to other systems.

"Product State": Here you can choose what the state of the product is or will be. The state options BMS offers are:

"Active" - The product is active.

"Delisted" - It is an inactive product.

"Consumer units per package": Is the number of product items included in one sales unit per package.

"EAN consumer unit": European Article Number, Barcode, for a consumer unit.

3

More in detail/specialized product information.

"Brand" - The field will describe the brand name as it is given by the company to characterize the product, e.g. brand name (Olympus) or product category (Cosmetics) etc. By clicking on the green plus button a new window will appear on the screen named **"Add new Brand"**. In this way you can add a **"Code"** and **"Name"** for the new created entry. After clicking ok, you have a new **"Brand"** listed in the selected option of the field.

Notes: To the right in the tab is the notes window where you can keep important notes about the product if needed.

IMPORT PRODUCTS USING EXCEL FILES



In order to have a ready template fitting with the system, you can create a product in the system, export it as an EXCEL file and then use the template to match the columns' data with your existing file columns' data. Use this file template to import your listings.



All the files you upload to the system will exist for seven days until the system automatically delete them. This is helping you to keep only the latest uploads and keep clean the system at the same time.



If you have not completed the first three steps, when you try to import, the system will give you a warning message that you have not uploaded any files.

Creating products/product list by import EXCEL files

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

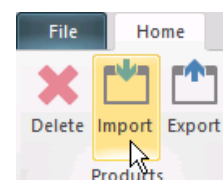
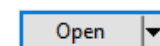
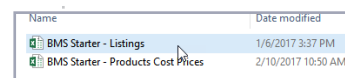
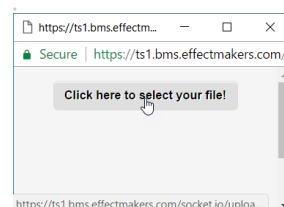
- 2 Click on the icon **"From PC to Server"**.

- 3 A new window pops up on the screen. Click the **"Click here to select your file"** and now you are ready to choose and upload files into the system.

Choose the files you want and click on **"Open"**. The files are saved automatically.

- 4 Go to **"Home"** ribbon and click on **"Product List"**.

- 5 The **"Product List"** tab now appears on the screen. Click on the **"Import"** icon to open the **"Import Products"** tab.





You can scroll back and forward with the “Back” and “Next” buttons in the bottom right side of the “Import Products” tab.



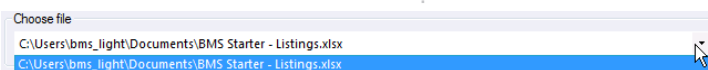
The option “Automatically create missing dimensions” is used to create your dimensions’ names in the system. But, next time you import you have not to make spelling mistakes because you will create data that are incorrectly informed.



In Fields Mapping you cannot skip it with empty fields in a row. Fill in with zero (0) in numerical or alphabetical fields if needed.

6

In “**Choose File**” field you can choose from the drop down list the file you want to import. In this drop down list, all your files you have uploaded previously from the PC to the server, are listed.

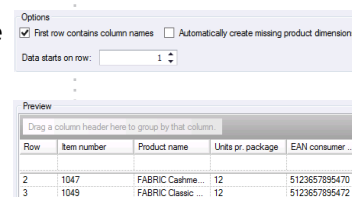


7

Select the file you want to import and then click “**Open**”. You can only select one file at a time.

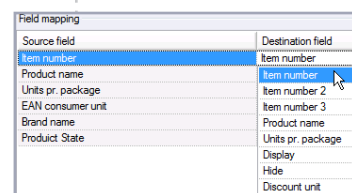
8

In the “**Source File**” template is the “**Options**” field with some options of how you can customize the file you want to import. Below options, you have the “**Preview**” field, where you can see any changes you make in the “**Options**”.



9

Go to “**Fields Mapping**” template in “**Import Products**” tab, to customize and match the “**Source Field**” names with the “**Destination Field**” names. You can do it simply by clicking in the field in “**Destination Field**” column next to the name of the “**Source Field**” column that you want to change. Choose the new name from the drop down menu. You can load if you have in the system, your already saved mappings by clicking on the “**Load Mappings**” button and find, choose and open the file in the new window that appears with the name “**Open**”.





If “Errors” or “Warnings” appear in this field, you will not be able to complete your import. They exist in order to prevent you from a wrong data import. This means that you have to work carefully with the column names and the data in each product, so you can be accurate with the data you import in BMS.

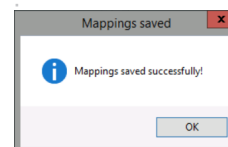


The button “Import” will only be active in the “Import” template.

10

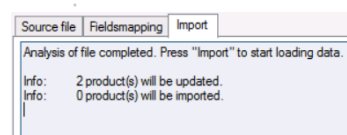
When you have completed the changes, click on “**Save Mappings**” and a new window will appear on the screen with the name “**Save As**”. Save the list in the folder and name it what you want. When you are done, click on “**Save**”. A confirmation window named “**Mappings Saved**” will appear requesting for your “**OK**” to continue.

Save Mappings



11

In the window “**Import Products**” you can go to the template “**Import**” in order to see the “**Analysis of file**”. Here is a field that automatically scans the data, from the first moment you upload a file and during the customization.



12

As soon as you are done with the changes, you can click on “**Import**” button and your products will import into BMS. Now you can find them in the “**Product List**”.

Import

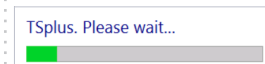
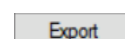
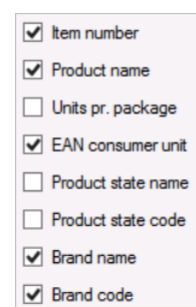
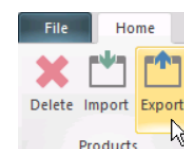
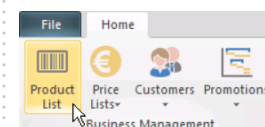
HOW TO EXPORT TO EXCEL



The saving process is different in every browser being in use, as each browser performs with a different way the downloading of files.

You can export products and products listings from the system to your local PC as an EXCEL format.

- 1 From the product list ribbon click on the **"Export"** icon. A new window will appear on the screen with the name **"Export products"**.
- 2 In this new window you can click and check the information of the products you want to export.
- 3 Click on **"Export"** button to export your data.
- 4 A window will appear on the screen displaying the loading process. When it is loaded it will automatically close.
- 5 The document now is downloaded. You can search, find and open the file.



COST



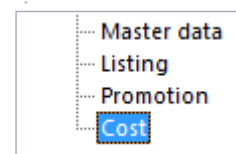
Once you delete something, you cannot undo it.



You can right-click on the "Product Cost" field and add or delete lines, as well as do some extra functions with your lines.

When clicking "**Cost**", you can view the cost prices for the selected product. In this window, it is possible to view the cost price history over a given period of time. The information displayed here is taken from the product point of view.

You can create a cost price list by adding an amount in "**Cost (Consumer Units)**" field for every product or by uploading a Cost price list. On next pages you will be guided how to import your Cost price list.



Product Cost

The field displays the information:

"Cost (Consumer Units)" - The cost per **"Consumer Unit"**.

"From Date" - The start date of the price.

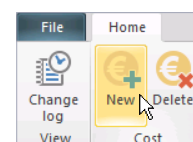
"To Date" - The end date of the price.

"Cost (Sales Unit)" - The cost per **"Sales Unit"**.

Product cost	From Date	To Date	Cost (Sales units)
Cost (Consumer units)			
Search...			

Create a Product Cost

- 1 Click on the **"New"** icon in the ribbon. A new line to edit has appeared in the **"Product Cost"** field.

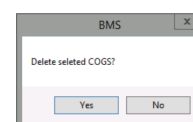
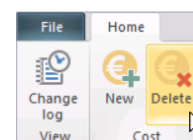


- 2 Customize the new line.

Product cost	From Date	To Date	Cost (Sales units)
Cost (Consumer units)			
Search...			
	09-01-2017	31-12-2027	0.00
6.08	01-01-2000	08-01-2017	36.50

Delete a Product Cost

- 1 Select the line(s) of the product cost you want to delete.
- 2 Click on the **"Delete"** button in the ribbon or press **"Delete"** button on your keyboard. A new window will be shown on the screen asking for your confirmation.
- 3 Click on **"Yes"** or **"No"** to finalize your action.



Cost Price List



In order to calculate the profitability you need to add cost price for each product.

Furthermore, you can visually monitor and compare all the products' cost prices any-time. Moreover, every change you make in Cost Price List, you have to be aware that it will not change the data that follow the product in listings, promotions etc., but it will add a new Cost price in the products profile.



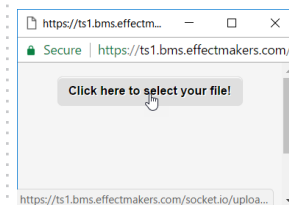
All the files you upload to the system will exist for seven days until the system automatically delete them. This is helping you to keep only the latest uploads and keep clean the system at the same time.

You can create Cost Price List by entering/typing in BMS all the cost prices of each product one by one or by importing an existing cost price list from your database in the form of EXCEL files.

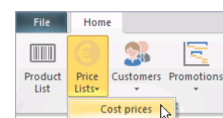
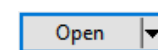
The optimal way to create your Cost price list in BMS is to create one product's cost price manually (page 15), export it as an EXCEL file and then mapping the template and use it to import all of your Cost prices.

Creating Cost Price list by import EXCEL files

- 1 Go to the top middle of BMS window and click on the gray arrow to show the basics functions bar.
- 2 Click on the icon of the **"From PC to Server"**.
- 3 A new window pops up on the screen with an active button named **"Click here to select your file"** and now you are ready to choose and upload files into the system. Choose the files you want then click on **"Open"** button. The files are saved automatically.
- 4 Go to **"Home"** ribbon and click on **"Price List"** icon and then on **"Cost Prices"**.
- 5 The **"Cost Prices"** tab now appears on the screen. From the ribbon click on the **"Import"** icon to open the **"Import Cost Prices"** window.



Name	Date modified
BMS Starter - Products Cost Prices	2/10/2017 10:22 A...





You can scroll back and forward with the “Back” and “Next” buttons on the down right side of the “Import Cost Price” window. The button “Import” will be active only in the “Import” template.



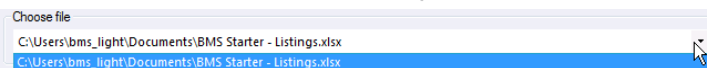
The option “Automatically create missing dimensions” is used to create your dimensions’ names in the system. But, next time you import you have not to make spelling mistakes because you will create data that are incorrectly informed.



In Fields Mapping you cannot skip it with empty fields in a row. Fill in with zero (0) in numerical or alphabetical fields if needed.

6

In “**Choose File**” field you can choose from the drop down list the file you want to import. In this drop down list, all your files you have uploaded previously from the PC to the server, are listed.

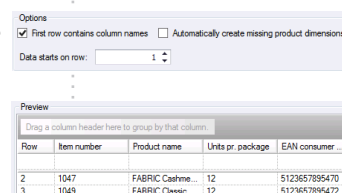


7

Select the file you want to import and then click “**Open**”. You can only select one file at a time.

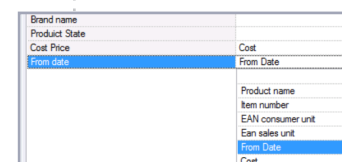
8

In the “**Source File**” template is the “**Options**” field with some options of how you can customize the file you want to import. Below options, you have the “**Preview**” field, where you can see any changes you make in the “**Options**”.



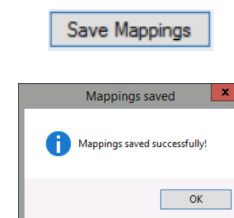
9

Go to “**Fields Mapping**” template in “**Import Products**” tab, to customize and match the “**Source Field**” names with the “**Destination Field**” names. You can do it simply by clicking in the field in “**Destination Field**” column next to the name of the “**Source Field**” column that you want to change. Choose the new name from the drop down menu. You can load if you have in the system, your already saved mappings by clicking on the “**Load Mappings**” button and find, choose and open the file in the new window that appears with the name “**Open**”.



10

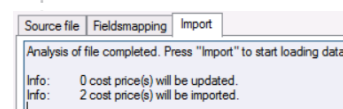
When you have completed the changes, click on “**Save Mappings**” and a new window will appear on the screen with the name “**Save As**”. Save the list in the folder and name it what you want. When you are done, click on “**Save**”. A confirmation window named “**Mappings Saved**” will appear requesting for your “**OK**” to continue.



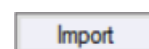


If “Errors” or “Warnings” appear in this field, you will not be able to complete your import. They exist in order to prevent you from a wrong data import. This means that you have to work carefully with the column names and the data in each product, so you can be accurate with the data you import in BMS.

11 In the window “**Import Cost Prices**” you can go to template “**Import**” in order to see the “**Analysis of the file**”. Here is a field that scans automatically the data, from the first moment you upload a file and during the edits you make.



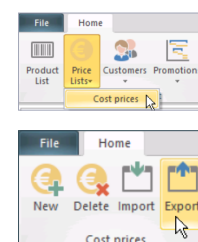
12 As long as you are ready with the data changes, you can click on “**Import**” button and your products’ cost prices have been imported into BMS.



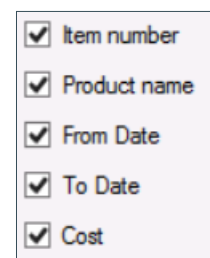
How to export a Cost Price List

You can export the list from the system to your local PC in an EXCEL format.

1 From the Cost Prices ribbon click on the “**Export**” icon. A new window will appear on the screen with the name “**Export cost prices**”.



2 In this new window you can click-and-check the information of the cost prices you want to export.





The downloading procedure may be different from browser to browser, as each browser performs with a different way this process.



You can add or delete a product in Cost price list and change the cost price of products.

- 3 Click on **"Export"** button to export your data..
- 4 A window will appear on the screen displaying the loading process of your action. When it is loaded it will close automatically.
- 5 The document is now downloaded. Find and open the file.

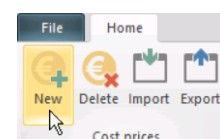
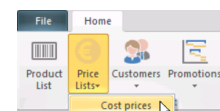
Export

TSplus. Please wait...

Add products in Cost Price List

The Cost price list is informed with all the products existing in the system. Furthermore, there is the possibility to have as many times a product as you want and with a different cost price every time.

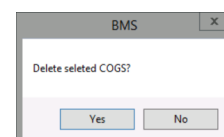
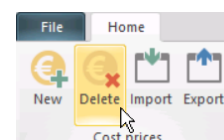
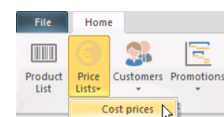
- 1 Click on the **"Price Lists"** icon on the Home ribbon and click on the **"Cost Prices"** beneath.
- 2 Click on the **"New"** icon. A window will open with all the products in the system.
- 3 You can search the product you want using the options at the down side of the window (SKU/Cases, Displays, Both, Show all products) or by searching in the columns. Now you can choose the product(s) you want to list by click and add one by one or multi-click (hold Ctrl) and add.



Item number	Product name	Units pr. package	Display	Brand
1007	TOMATO Ketch...	6	<input type="checkbox"/>	
P20141123-1349...	Promo pack 1 To...	1	<input type="checkbox"/>	
20150217	Manuelt netto tes...	1	<input type="checkbox"/>	
15000	Dummy	1	<input type="checkbox"/>	
20150217-155828	New product	1	<input type="checkbox"/>	
1067	FABRIC Soft	0	<input type="checkbox"/>	
20150306-135408	Test	1	<input type="checkbox"/>	
3000	Den B&B Stiegler s...	1	<input type="checkbox"/>	
5002	WINE Gum Mix 2...	6	<input type="checkbox"/>	
5003	WINE Gum Kids...	7	<input type="checkbox"/>	
5004	WINE Gum Extra...	5	<input type="checkbox"/>	

Delete products from Cost Price List

- 1 Click on the **"Price Lists"** icon on the Home ribbon and click on the **"Cost Prices"** beneath.
- 2 Select the product(s) you want to delete by clicking on it.
- 3 Click on the **"Delete"** icon or press Delete button on your keyboard. A confirmation window will appear on the screen, asking for your approval of this action.
- 4 Click **"Yes"** or **"No"** in order to finalize your action.



Change Cost Price of products

- 1 Click to select the product you want to change the cost price.
- 2 Click on the column field of **"Cost (Consumer Units)"** of the product and the field will become editable.
- 3 Type in the cost price you want. When you are ready press **"Enter"** on your keyboard. The changes have been automatically saved.

Drag a column header here to group by that column.

Item number	Product name	Cost (Consumer units)	Brand
1000	HAIR Shampoo Normal	3,17	HAIR
1001	HAIR Shampoo Colored	3,90	HAIR
1002	HAIR Shampoo Shiny	4,68	HAIR

Cost (Consumer units)	
	3,17
	3,90
	4,68
	7,02
	4,68



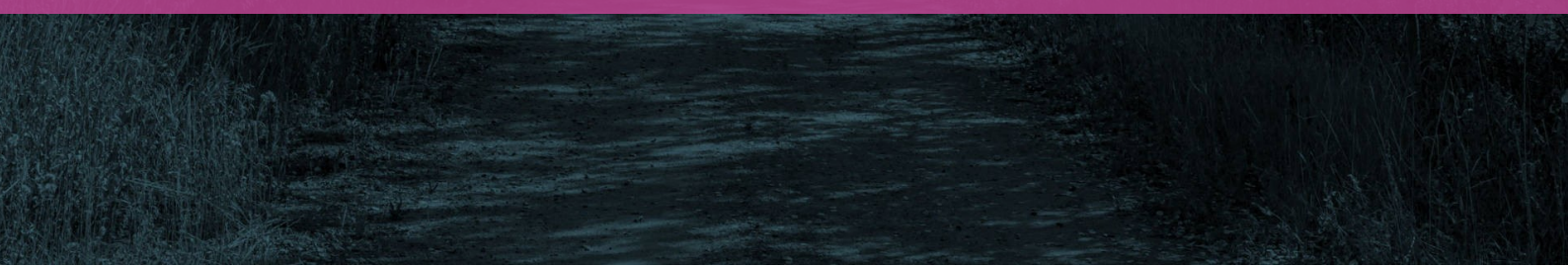
If you cannot apply a new cost price on a product, probably it is because you do not use the right coma for decimals when you type in the numbers.

Try between coma and dot to find the way the system accepts the number.



CUSTOMERS

In this section you will learn how to create customers in the system. BMS Starter for CatMan Solutions comes with a basic customer list of Top Level and Banners.



CREATE CUSTOMERS



You create a new customer by entering relevant information in BMS. There is no import option to import your customer list from Excel files. You have to create them in BMS, so you have to enter the necessary information the system needs.



From the first moment you create a new customer, it is automatically saved in the system's customer list, even if you do not enter any information about the customer. This goes for every new creation. The system automatically creates an "ID" for it. Thus, you can always have a "New Customer" in your customer list you can update.



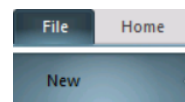
To the left, a new list has been shown with the options of "Settings" and "Listed Products".



It is easier to create customers from the top level and down to the banner level. This way you will be able to link the customers correctly. Nevertheless, you can always edit the customer hierarchy in Settings.

Creating customers in BMS

- 1 Click on **"File"** icon on the upper left corner. Click on **"New"** icon below **"File"**.
- 2 Click on **"Customer"** icon. A new tab will be created and now you are ready to start customizing your new customer's information.

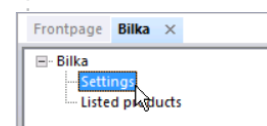


Customer

Creating a new Customer - Settings

Here you add information about your customer. Please, fill out as many fields as possible.

- 1 Click on the **"Settings"** icon in the list to the left. Now, you have opened a new window with the name **"Basic Data"** and you are ready to start entering your customer's information.



- 2 Start typing the **"Master Data"** information:

"ID": Customer **"ID"** is generated by **BMS** and is unique for each new customer.

"Active": Check or uncheck the box to state if the customer is active or not.

"Customer Name": It is the name of the customer.

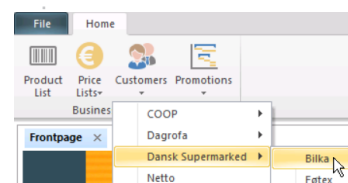
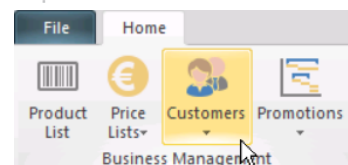
"Customer Number": It is the customer's unique number, which is also the key that can link the customer to other systems.

- 3 Start typing the **"Customer Hierarchy"** information:

"Customer Type": Select if the customer is a **"Top Level"** customer or if he is a **"Banner in this top level customer"**. If the new customer is a banner in a top level customer, click on the arrow in the field and chose the name of the top level customer.

FIND AN EXISTING CUSTOMER

- 1 Click on the “**Customers**” icon on the ribbon. The customer list drops down with all the “**Top Level**” customers and the banners.
- 2 Select and click on the customer’s name you want. The customer’s tab will open.





LISTINGS AND INVOICE PRICES

Listings are a useful way to segment groups and apply your different policies for each group instead of individually for each product or customer.

LISTINGS AND INVOICE PRICES



In this field, you can see the listing details of the selected product for all customers and their underlying banners.

Here you have the option to edit a list for the specific product, customizing listings in one place instead of on every customer separately.

Listing in Products

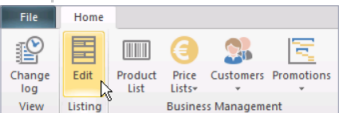
You will find the **"Listing"** field for products on the left side when you display a product profile.

Edit a listing

- 1 Select the customer's names you want to list in this product, by clicking in the box on the **"Listed"** column.

Customer name	Listed	Listing state	Listing code
All Others	<input checked="" type="checkbox"/>	Listed on top	LoT
COOP	<input checked="" type="checkbox"/>	Listed on top	LoT
COOP - Coop dk	<input type="checkbox"/>		
COOP - Daglig Brugsen	<input type="checkbox"/>		
COOP - Krivicky	<input type="checkbox"/>		
COOP - Superbrugsen	<input type="checkbox"/>		
Dansk Supermarked	<input checked="" type="checkbox"/>	Listed on top	LoT
Dansk Supermarked - Bilka	<input type="checkbox"/>		
Dansk Supermarked - Fatex	<input type="checkbox"/>		

- 2 In the ribbon, click on **"Edit"** icon and a new window appears on the screen with the name **"Edit Listing"**.



- 3 Enter the information:
- "From Date"**: The starting date that the listing state should take effect from.
- "To Date"**: The end date that the listing state should take effect to.
- "Listing State"**: Select a listing state from the drop down list or type a new one.
- Click on **"OK"**. It is automatically saved.

Listing

Fromdate:

Todate: 06-06-2079, ti

Listingstate: Listed on top

CUSTOMERS LISTINGS AND PRICES



Customers Listings and Prices helps with the Chain prices of products that may exist.



You can adjust the listing filters, save it as an EXCEL file and segment the list when using the features in the upper and right side of the tab.



You can click on "Add" button to keep the window open, so you can select more products to add and close the window after. Or, you can select the product(s) you want and click on "Add and Close", so you can have the window closed automatically after the product's import.

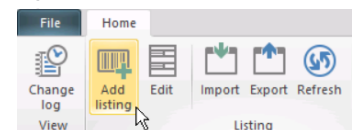
Listed products

Here you have an overview of the products that are listed to a specific customer. This allows you to assign and maintain listings for the selected customer.

If you do not have any products in BMS or if you have an existing list you can import by clicking on "Import" icon and follow the steps "Creating product/product list by import EXCEL files", introduced in the "How to create a new product" guide. Also, if you want to "Export", you have to follow the steps "How to export a file", introduced in the "How to create a new product" guide.

Add a listing

- 1 Click on "**Listed Products**" and on "**Add Listing**" icon in the ribbon and a new window will appear on the screen with the name "**Add Products**".

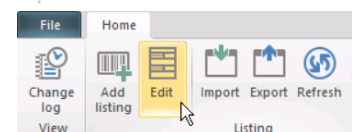


- 2 You can search for the product you want by using the options at the bottom side of the window (SKU/Cases, Displays, Both, Show all products) or by searching in the columns. Now, you can choose the product(s) you want to list to this customer by click and add one by one or multi-click (hold Ctrl) and add.

Item number	Product name	Units pr. package	Display	Brand
1007	TOMATO Ketch...	6		
P20141123-1349...	Promo pack 1 To...	1	<input type="checkbox"/>	
20150217	Manuel rete ties...	1	<input type="checkbox"/>	
15000	Dummy	1	<input type="checkbox"/>	
20150217-155828	New product	1	<input type="checkbox"/>	
1987	FABRIC Soft	0	<input type="checkbox"/>	
20150306-135408	Test	1	<input type="checkbox"/>	
3000	Den Blå Slagter s...	1	<input type="checkbox"/>	
5002	WINE Gum Mix 2...	6	<input type="checkbox"/>	
5003	WINE Gum Kids...	7	<input type="checkbox"/>	
5004	WINE Gum Extra	5	<input type="checkbox"/>	

Edit a listing

- 1 At the Listed Products ribbon click on "**Edit**" and a new window appears on the screen with the name "**Edit Listing**".



- 2 Enter the information:

"From Date": The starting date the listing state should take effect from.

"To Date": The end date the listing state should end.

"Listing State": Select a listing state from the drop-down list or type a new one.

Listing

Fromdate: 29-01-2017, se

Todate: 06-06-2079, ti

Listingstate: Promotion

- 3 Click on "**OK**", it is automatically saved.

DELETE A PRODUCT FROM THE LIST

If you want to delete a product from the customer’s list, it is important to know that the product will be deleted from the specific listing and not from the “Product List” or the system.

How to delete Product(s) from the listing

- 1 Select the product you want by clicking on it, or hold Ctrl and multi-click more than one product.
- 2 Delete the product(s) simply by pressing the **“Delete”** button on your keyboard or right-click with your mouse and click on **“Delete Listing”**.

Listing: 10ika

Brand	Product name	Item number	EAN consumer unit	Product state	Listing state	From data
FABRIC	FABRIC Classic	1048	5123657895471	Active	Linked on top	
FABRIC	FABRIC Classic	1049	5123657895472	Active	Linked on top	
FABRIC	FABRIC Classic	1050	5123657895473	Active		
FABRIC	FABRIC Classic	1051	5123657895474	Active		
FABRIC	FABRIC Classic	1052	5123657895475	Active		
FABRIC	FABRIC Classic	1053	5123657895476	Active		
FABRIC	FABRIC Classic	1054	5123657895477	Active		
FABRIC	FABRIC Classic	1055	5123657895478	Active		
FABRIC	FABRIC Classic	1056	5123657895479	Active		
FABRIC	FABRIC Classic	1057	5123657895480	Active		

It's all about Data Quality

Data validity is Crucial - Everybody agrees that promotion data requires clear definitions and consensus among the involved. **BUT in reality**, very often, we experience **data slack** and **inconsistency** which makes it impossible to use and work with the data.

Promotion period - It is crucial that the start date and the finishing date is correct and 100% aligned with the actual time when the promotion (the promotion price) is running at store level. **If not - All promotion calculation will be wrong.**

Promotion status - Promotion status could be Planned, Approved, Settled (*available on the Basic, Advance, Enterprise editions of BMS*) or Deleted. It is important that you are aware of the consequences of the three stages working with POS data. If a planned promotion is not accepted it is important to delete

the promotion. Otherwise, it will end up being analyzed as an accepted or even as settled as all POS data related to the promotion are date driven.

Promotion type and promotion mechanics - Having clearly defined and agreed on promotion types and mechanics related to your business - Will allow you and your organization to build up a strong platform of knowledge, when it comes to optimizing future promotion tactics and strategies. Using POS data to evaluate and analyze promotions also gives you a unique opportunity to understand the promotion key drivers to success. It is up to you and your company to decide which promotion variable you want to be able to track. To utilize the opportunity, you need to define a series of unique type of promotions and promotion mechanics.

Kenneth Codam, CatMan® Solution



PROMOTION

This section is the substantive part of BMS. Promotion planning through BMS is a powerful tool for preview and review of promotions and promotion success.

CREATE PROMOTIONS



In order to create a promotion you need to define products and customers. The more detailed information you enter in BMS the more accurate promotion results you will get out of the system.

From the moment you start to create a new promotion, even if you do not finish the setup of the promotion, it will be saved in the system and appears on the promotion calendar.

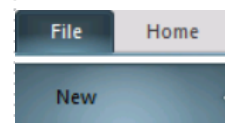


You can configure the color that will represent the promotion, the product, the customer, to segment your data.



In order to define the drop-down-list options in State, Type, Media, Purpose, go to page 40-42.

- 1 Click on **"File"** icon in the upper left corner and click on **"New"** icon below **"File"**.
- 2 Click on **"Promotion"** icon. A new tab opens with the name **"Promotion (number)"**. The number is a serial number generated from the system.
- 3 Enter information in the fields:
 - "Customer"** - From the drop-down list choose the customer of the promotion.
 - "State"** - Choose the state of the promotion from the predefined states Approved, Planned or Deleted. This field is highly important to be clarified correctly.
 - "Name"** - Write the name of the promotion.
 - "From"** - Define the starting date of the promotion.
 - "To"** - Define the end date of the promotion.
 - "Type"** - Define the type of promotion choosing from On-Pack, Contest, Coupon, Price Promotion, Sampling, Free Gift and Multi-Buy. The corresponding CatMan field-name is defined as **"Promotion Type"**.
 - "Media"** - Define the level of Media support between No support, Low Support, Medium Support or High Support. What each level represents should be clarified from the organization.
 - "Purpose"** - Define the scope of this promotion by choosing one of the predefined terms; Create Trial, Keep Distribution, Repurchase, Gain Share, Counter Act, Surplus Stock and Customer Demand.
 - "Promotional Mechanics"** - Chose between **Soft** or **Hard Price** in order to define the price position, **Single** or **Multi Buy** in order to define the offer type, **Mid-Month** or **Month Change** or **Festival** in order to define the chronological time of the promotion. The corresponding CatMan field-name is defined as **"Position"**.
 - "Settlement"** - Choose between **Sell out** or **Sell in** options.



Customer	Bilka
State	Planned
Name	Hair care week

From	17-01-2017	03	Tue
To	22-01-2017	03	Sun

Type	Select type:
Media	Select media:
Purpose	Create repurchase

Promotional mechanics			
<input type="radio"/> Soft price	<input type="radio"/> Single buy	<input type="radio"/> Mid month	
<input checked="" type="radio"/> Hard price	<input checked="" type="radio"/> Multi buy	<input type="radio"/> Month change	
<input checked="" type="radio"/> Festival			

Settlement:	<input type="radio"/> Sell out	<input checked="" type="radio"/> Sell in
-------------	--------------------------------	--

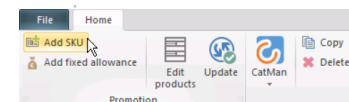


You can click on “Add” button to keep the window open, so you can select more products to add. Or, you can select the product(s) you want and click on “Add and Close”, so the window will close automatically after.

4 Add the promotional product(s).

Click on “Add SKU” icon in the ribbon or right-click in the products field and click on “Add Product”. In both ways you follow the same steps:

4.1: After clicking on “Add SKU” or “Add Product”, a new window will appear on the screen with the name “Add Products”.



Drag a column header here to group by that column.

Item number	Product name	Units pr. package	Display	Brand	Product state
1000	HAIR Shampoo ...	6	<input type="checkbox"/>		Active
1001	HAIR Shampoo ...	12	<input type="checkbox"/>		Active
1002	HAIR Shampoo ...	12	<input type="checkbox"/>		Active
1003	HAIR Shampoo ...	12	<input type="checkbox"/>		Active
1004	CLEAN Soap 2L	8	<input type="checkbox"/>		Active
1005	SOFT Desk 750ml	12	<input type="checkbox"/>		Active
1006	FORTE Mousse	12	<input type="checkbox"/>		Active
1007	TOMATO Ketch...	6	<input type="checkbox"/>		Active
1008	TOMATO Ketch...	5	<input type="checkbox"/>		Active
1009	TOMATO Ketch...	6	<input type="checkbox"/>		Active
1010	TOMATO Ketch...	12	<input type="checkbox"/>		Active
1011	TOMATO Ketch...	12	<input type="checkbox"/>		Active
1012	TOMATO Ketch...	180	<input checked="" type="checkbox"/>		Active
1013	TOMATO Ketch...	10	<input type="checkbox"/>		Active
1014	TOMATO Ketch...	6	<input type="checkbox"/>		Active
1015	TOMATO Ketch...	180	<input checked="" type="checkbox"/>		Active
1016	TOMATO Ketch...	150	<input checked="" type="checkbox"/>		Active

4.2: You can search for the product you want by using the options at the bottom of the window or by searching in the columns. Now, you can choose the product(s) you want to add to this promotion by click and add one by one or multi-click (hold Ctrl) and add.

☐ SKU/Cases ☐ Displays ☒ Both ☒ Show all products

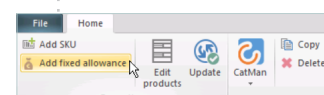
4.3: Add “Variable Allowance” and the missing information in the columns to all SKU's/products in currency.

Products

Drag a column header here to group by that column.

Item number	Product name	EAN consumer unit	Variable allowance 2	Multi-buy	Brand	Retail price (total incl. VAT)	Chain Price	Chain Net Price
1003	HAIR Shampoo Dry	5123657895426	0.00	3	HAIR	75.00	14.65	2.15
1002	HAIR Shampoo Shiny	5123657895425	0.00	3	HAIR	75.00	14.65	2.15
1001	HAIR Shampoo Colored	5123657895424	0.00	3	HAIR	75.00	14.65	2.15
1000	HAIR Shampoo Normal	5123657895423	0.00	3	HAIR	75.00	14.65	2.15

5 Add, if needed, a fixed allowance for the promotion. Click on “Add fixed allowance” icon in the ribbon or right-click in the field of “Fixed Allowance” and click on “Add fixed allowance” option. A line has been added in the Fixed Allowance field and you can now enter the fixed allowances amount.



Fixed allowance

Description	Forecast amount	Key
Imported	0	

DELETE A PRODUCT FROM THE PROMOTION LIST



If I want to delete a product from the promotion products list, it is important to know that the product will be deleted from the specific list and not from the "Product List" or the system.

- 1 Select the product you want by clicking on it, or hold Ctrl and multi-click more than one product.

Products

Drag a column header here to group by that column.

Item number	Product name	EAN consumer unit	Variable allowance 2	Multi-buy	Brand	Retail price (total incl. VAT)	Chain Price	Chain Net Price
1003	HAIR Shampoo Dry	512365789426	0.00	3	HAIR	75.00	14.65	2.15
1002	HAIR Shampoo Sherry	512365789425	0.00	3	HAIR	75.00	14.65	2.15
1001	HAIR Shampoo Colored	512365789424	0.00	3	HAIR	75.00	14.65	2.15
1000	HAIR Shampoo Normal	512365789423	0.00	3	HAIR	75.00	14.65	2.15

- 2 Delete the product(s) simply by pressing the **"Delete"** button on your keyboard or **"right-click"** with your mouse and click on **"Delete"**.

Products

Drag a column header here to group by that column.

Item number	Product name	EAN consumer unit	Variable allowance 2	Multi-buy	Brand	Retail price (total incl. VAT)	Chain Price	Chain Net Price
1003	HAIR Shampoo Dry	512365789426				75.00	14.65	2.15
1002	HAIR Shampoo Sherry	512365789425				75.00	14.65	2.15
1001	HAIR Shampoo Colored	512365789424				75.00	14.65	2.15
1000	HAIR Shampoo Normal	512365789423				75.00	14.65	2.15

Context menu options:

- Add product
- Add display
- Show product
- Delete
- Create specific delivery profile

Delete a Fixed Allowance

If you want to delete a Fixed Allowance from the promotion Fixed Allowance list, it is important to know that you cannot undo this and if you want the deleted Fixed Allowance again, you have to recreate it.

- 1 Select the Fixed Allowance you want by clicking on it, or hold Ctrl and multi-click, for more than one.
- 2 Delete the Fixed Allowance(s) by pressing the **"Delete"** button on your keyboard or **"right-click"** and click on **"Delete"**.

Fixed allowance

Description	Forecast amount	Key
Imported		

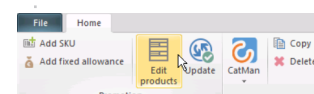
Context menu options:

- Add fixed allowance
- Delete fixed allowance
- Collapse groups
- Expand groups

Edit the promotion product(s)

You can edit the promotion product(s) and customize important variables. You can edit them one by one or select the ones you need and edit all the selected at the same time.

- 1 From the promotion products click to select the one you want to edit, or hold CTRL and multi-click to select more than one. Click on **"Edit Products"** icon in the promotion ribbon. A new window appears on the screen with the name **"Edit"**.





Although all the information you enter in a promotion are autosaved from the system, you can update it manually by clicking on the "Update" icon on the ribbon. This is useful when you edit amounts.

2

Customize the fields of "**Promotion Volume**", "**Variable Allowance**" and "**Retail Offer Price**". When you finish, click "**OK**" and the changes are saved.

"Promo discount on Invoice" - The amount of the promotion's discount, which will be included in the invoice.

"Variable Allowance 1" - The amount of the variable allowance is displayed.

"Variable Allowance 2" - The amount of a possible extra variable allowance.

"Multi-buy" - Displays the number of multi-buy units.

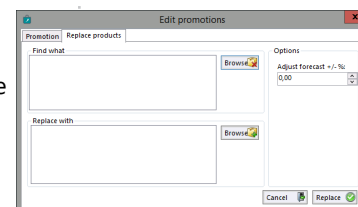
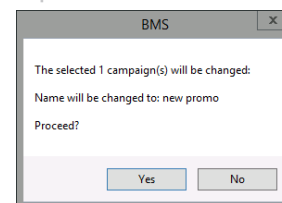
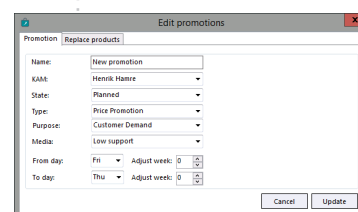
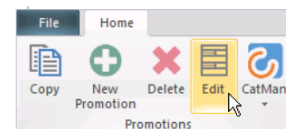
"Retail Price (total incl. VAT)" - The total retail price of the product's promotion including VAT.

EDIT PROMOTIONS



You can edit an existing promotion from the "Promotion List" without opening the promotion.

- 1 Open the Promotion List tab in the system and click to select the promotion you want to edit.
- 2 Click on the **"Edit"** icon on the Promotion List ribbon or right-click on the selected promotion and then click on **"Edit"**. A new window with the name **"Edit Promotions"** will open on the screen.
- 3 In the **"Promotion"** tab edit the fields you want to customize and then click on the **"Update"** button. A confirmation window will open on the screen.
- 4 Click on **"Yes"** or **"No"** to finalize your action.
- 5 Click on **"Edit"** again and select the **"Replace Products"** tab to edit the **"Find what"**, **"Replace with"** and **"Adjust Forecast"** fields and then click on the **"Replace"** button. The changes are saved automatically.



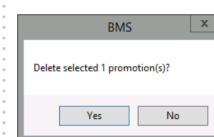
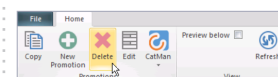
DELETE A PROMOTION



You can hold CTRL and multi-click on the promotion you want to open and all the tabs will open at the same time.

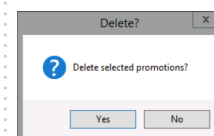
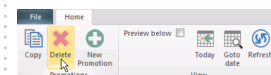
Delete a promotion from "Promotion List"

- 1 Go to the **"Promotion List"** and select the promotion you want to delete.
- 2 From the Promotion List ribbon click on the **"Delete"** icon and a confirmation window will appear on the screen, asking for your approval.
- 3 Click **"Yes"** or **"No"** to finalize your action.



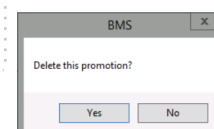
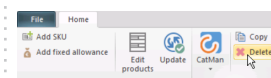
Delete a promotion from "Promotion Calendar"

- 1 Go to **"Promotion Calendar"** and select the promotion you want to delete.
- 2 In the ribbon click on the **"Delete"** icon and a confirmation window will appear on the screen, asking for your approval.
- 3 Click **"Yes"** or **"No"** to finalize your action.



Delete a promotion while it is displayed

- 1 Open the promotion you want from the Promotion List or the Promotion Calendar.
- 2 In the ribbon, click on **"Delete"**. A confirmation window will appear on the screen, asking for your approval.
- 3 Click **"Yes"** or **"No"** to finalize your action.





In BMS you can find and open your promotions and customize them, fix them, use them for another promotion, copy them, delete them, change the dates. Every change is possible anytime. As you cannot undo your deleting, be careful with the customization.



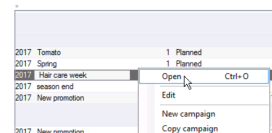
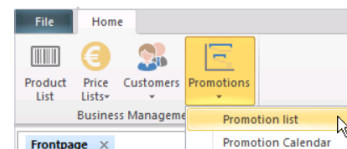
You can hold CTRL and multi-click on the promotion you want to open and all the tabs will open at the same time.



In the "Promotion Calendar" tab, you can go to the ribbon and Copy, Create a new Promotion and Delete promotions, following the same steps described in this guide. Moreover, you can select a promotion and click on "Preview Below" checkbox and have a preview field of the promotion. Click on "Today" and "Go to Date" icons to go to today's date or to choose a specific time period. You can also click and hold on a promotion and move it around the calendar, so you can place it on a different time period.

How to find a promotion from the promotion list

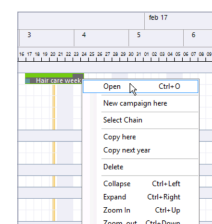
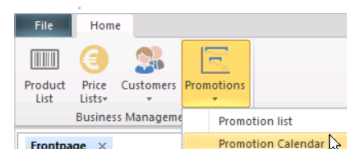
- 1 In the ribbon click on "**Promotion**" icon and a drop down window will appear with the two option of "**Promotion List**" and "**Promotion Calendar**".
- 2 Click on "**Promotion List**" and the promotion list tab will open. This is the list, where all of your promotions are saved, segmented into Customer name, Banner name and From year.
- 3 Find the promotion you want to open and double-click on it or right-click and chose "**Open**". The selected promotion will open in a new tab.



How to find a promotion from the Calendar

This function helps you keeping control of the time periods of your promotions.

- 1 In the ribbon click on "**Promotion**" icon and a drop-down list will appear with the two option of "**Promotion List**" and "**Promotion Calendar**".
- 2 Click on the "**Promotion Calendar**" and the promotion calendar tab will open. This is the window, where all of your promotions are saved based on the dates they are planned, segmented into Customer name, Banner name, color and date. The calendar displays the length of the promotion from the date it starts until it ends.
- 3 Find the promotion you want to open and double-click on it or right-click and chose "**Open**". The selected promotion will open in a new tab.





Basically this window contains the same information as the "Promotion List", but this list is filtered, so it only contains the promotions where the particular product is included.



When accessing the promotion details for the product, you have access to specific promotion options from the Promotion ribbon.

The Promotion ribbon allows you to work with the selected product in the promotion spreadsheet.



You can double click on a promotion to open it, view it and edit it.

Promotions in products

When clicking in this field, the promotions/campaigns this product operates or has been operating or will be operating will appear on the screen.

- 1 Click on the "**Product List**" icon from the ribbon.
- 2 Select the product you want, double click on it and open it.
- 3 From the left side of the spreadsheet click on "**Promotion**" to open it.
- 4 Edit the fields

Minimum [Net Sale] Selling Price: Is the net selling price per unit.

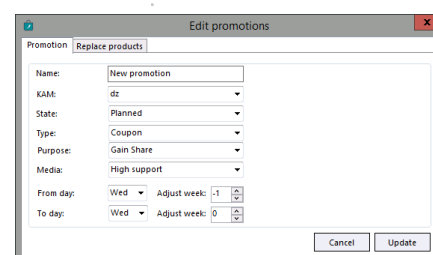
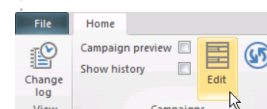
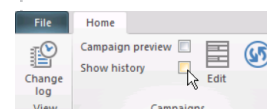
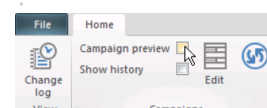
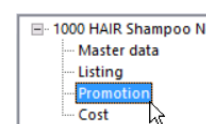
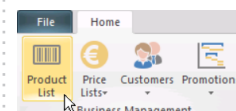
Campaigns: Here you have the list with all the campaigns the product displays.

When accessing the promotion details for the product, you have access to specific promotion options from the Promotion ribbon. The Promotion ribbon allows you to work with the selected product in the promotion window.

Campaign Preview: Check or uncheck to preview the selected promotion. This will open a window at the bottom of the screen enabling you to view details for the selected promotion.

Show History: Check to view all promotions past as well as future. By default, only future promotions are displayed.

Edit: Click to edit one or several promotion(s) by selecting your choice of action in the window that opens. But, first, you have to select at least one promotion from the "**Campaigns**" field.





SYSTEM MAINTENANCE

This section contains some additional usefull functions that is nice to know. BMS offers e.g. import and export of data.



HOW TO DELETE PRODUCTS AND CUSTOMERS

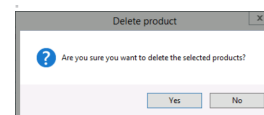
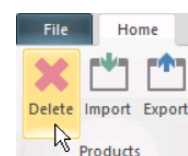


If you want to "Delete" a product from the system, you have to be careful as you cannot undo it. A better solution is to mark the product as "Delisted".

How to delete a Product from the product list

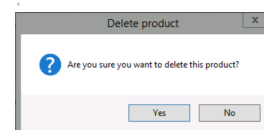
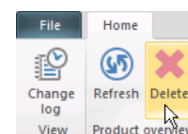
- 1 Open the **"Product List"** and select the product you want to delete. You can multi-click to select more than one product.
- 2 Right-click on the selected product(s), or press the **"Delete"** button on your keyboard, or click on the **"Delete"** icon in the ribbon. A confirmation window will appear on the screen asking for your approval.
- 3 Click on **"Yes"** or **"No"** to finalize your action.

Item number	Product name	Units pr. package	Product state
Search...			
1000	HAIR Shampoo Normal	6	Active
1001	HAIR Shampoo Colored	12	Active



How to delete a Product while displaying it

- 1 Select the product you want to delete from the product list and double-click on it to open it. The product's tab will open.
- 2 From the product's ribbon click on **"Delete"** icon. A confirmation window will appear on the screen asking for your approval.
- 3 Click on **"Yes"** or **"No"** to finalize your action.

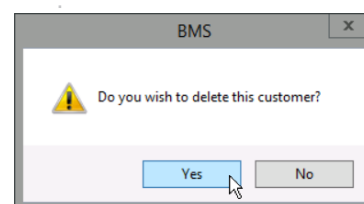
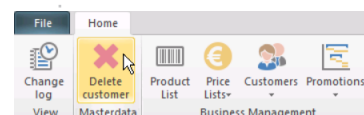
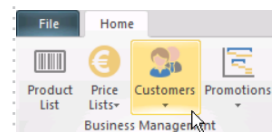


HOW TO DELETE A CUSTOMER



If you want to "Delete" a customer from the system, you have to be careful as you cannot undo it. A better solution is to mark the customer as "Inactive", by simply unchecking the "Active" box.

- 1 Click on "**Customers**" on the home ribbon and select the customer you want to delete and open the customer. The customer's tab will open.
- 2 From "**Settings**" ribbon click on "**Delete Customer**" icon. A confirmation window will appear on the screen asking for your approval.
- 3 Click "**Yes**" or "**No**" to finalize your action.



EVENT VIEWER



You can track all of your changes into the system, from the first day until the most recent, with the “Event Viewer” option.



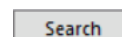
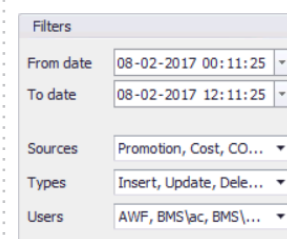
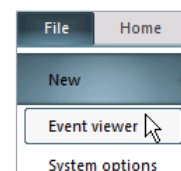
All your activities, changes, etc. are automatically saving in “Event Viewer”. Thus, you can track back anytime any information you need for anything.



The more data you want to track, the more time the system will take to load them. Try to narrow down as much as you can your search criteria in order to make it easier and faster for you to track the data you want.

How to use Event Viewer

- 1 Click on the “**File**” icon on the upper left corner. Click on the “**Event viewer**”. A new spreadsheet with the name “**Eventlog**” will open.
- 2 In this new spreadsheet you can custom search using the “**Filters**” field choices.
 - “**From date**” & “**To date**” - Choose the time period you want to display.
 - “**Sources**” - Choose the source you want o use.
 - “**Types**” - Specify what type of action you want to track.
 - “**Users**” - You can track a specific user’s actions.
- 3 Once you set up the filters, click on “**Search**” button and the system will load all the results it can track based on your filters.



EXPORT THE SEARCH FROM EVENTLOG IN EXCEL FILE

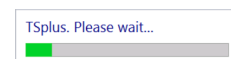
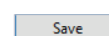
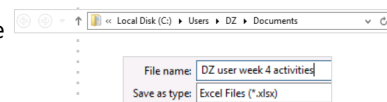


On the left side of the Eventlog spreadsheet, down from Filters field it will always be displayed the total amount of results you get after you search and the time the system used to load the data of your search.



There downloading procedure may be different from browser to browser, as each browser performs with a different way this process.

- 1 At the upper right corner of the **"Eventlog"** spreadsheet you can find the **EXCEL** icon. Click on it to open a new window to save your data.
- 2 In the new window choose destination to save the file and give a name to your file.
- 3 Click on **"Save"** button.
- 4 A window will appear on the screen displaying the loading process of your action. When it is loaded it will close automatically.
- 5 The document now is downloaded. Search in the file you download it to open it.



RIBBON ILLUSTRATION

Change log

When **"Change log"** icon is displayed in the ribbon, you can click on it and track all the changes that have been made in the specific section you are. Use the same steps as Event Viewer section.

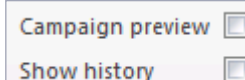


Product ribbon

When clicking on **"Promotion"** on the list on the left in the ribbon you get **"Campaign Preview"** and **"Show History"**.

Click on **"Campaign Preview"** box to open the preview window of the selected promotion.

Click on **"Show History"** box to display the list of the promotions this product has been listed.



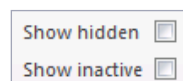
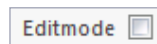
Product List ribbon

In **"Promotion List"** ribbon you get **"Edit Mode"**, **"Show Hidden"** and **"Show Inactive"**.

Click on **"Edit Mode"** box to enable edit changes in the products displaying in the list.

Click on **"Show Hidden"** box to display the hidden products of the list.

Click on **"Show Inactive"** box to display the inactive products of the list.



Promotion List ribbon

In **"Promotion"** ribbon you get **"Preview Below"**.

Click on the box to open the preview window of the selected promotion.


Promotion Calendar ribbon

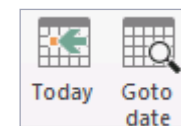
In “**Promotion Calendar**” ribbon you get “**Preview Below**”, “**Today**” and “**Go to date**”.

Click on “**Preview Below**” box to open the preview window of the selected promotion.

Click on “**Today**” icon to monitor the today promotions display.

Click on “**Go to date**” icon to go and monitor the selected day's promotions.

Preview below 

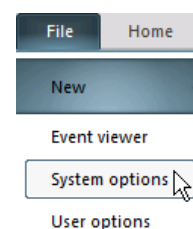


SYSTEM OPTIONS CONFIGURATION

In BMS you are able to configure your displaying drop-down-list choices. This function helps the user to create promotions based on the terminology the organization is already using. This option is available in the “**System Options**” of the **BMS** application. **BMS** has by default pre-defined basic terms to help the user to understand the use of each field.

How to open the System Options

- 1 Click on the “**File**” icon on the upper left corner of the application window and from the list click on “**System Options**”. A new window opens on the screen.



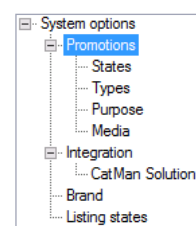
- 2 To the left of the window is a list with the system options that can be maintained. Click on “**Promotions**”, a sub-list is displayed with the options “**States**”, “**Types**”, “**Purpose**” and “**Media**”.

“**States**” – Corresponds to the State options that will be displayed on the drop-down-list of the “**State**” field in the promotions you plan.

“**Types**” - Corresponds to the Type options that will be displayed on the drop-down-list of the “**Type**” field in the promotions you plan.

“**Purpose**” - Corresponds to the Purpose options that will be displayed on the drop-down-list of the “**Purpose**” field in the promotions you plan.

“**Media**” - Corresponds to the Media options that will be displayed on the drop-down-list of the “**Media**” field in the promotions you plan.





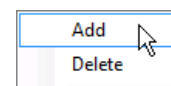
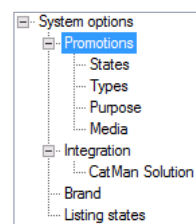
You can check and uncheck the boxes in the columns next to each line, to specify the display of each option or to display it or not in another field/list.

Add, Delete, Rename the lines

The maintenance in these four fields, States, Types, Purpose and Media, follows the same steps.

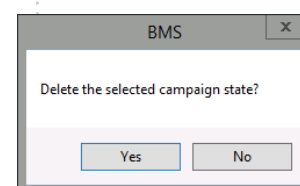
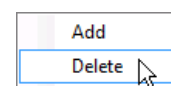
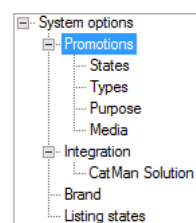
Add a new line

- 1 Click on **"States"**, **"Types"**, **"Purpose"** or **"Media"** and the corresponding field will appear on the main screen of the **"System Options"** window.
- 2 Right-click anywhere and click on **"Add"** to add a new line. It is automatically saved.



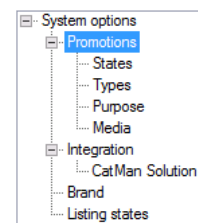
Delete a line

- 1 Click on **"States"**, **"Types"**, **"Purpose"** or **"Media"** and the corresponding field will appear on the main screen of the **"System Options"** window.
- 2 Right-click the line you want to delete and then click **"Delete"**. A confirmation window will appear on the screen asking for your approval.
- 3 Click **"Yes"** or **"No"** to finalize your action.



Rename a line

- 1 Click on **"States"**, **"Types"**, **"Purpose"** or **"Media"** and the corresponding field will appear on the main screen of the **"System Options"** window.



- 2 Click the column which displays the name of the line you want to rename and the box will be ready to be edited.

Campaign type	Detect Conflict	Export To Catman
Search...		
On-Pack	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contest	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Coupon	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Price Promotion	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- 3 Type the new name you want to give to the line and press **"Enter"** on your keyboard. The new name has been saved automatically.

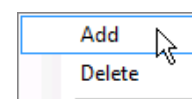
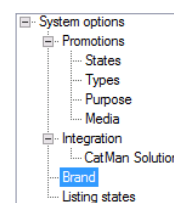
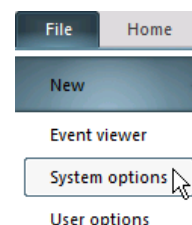
PROMOTION COLOR CONFIGURATION



In this System Options field you can segment by color your Promotions. In order to do this you have to define and create your segment variables and represent them with a specific color.

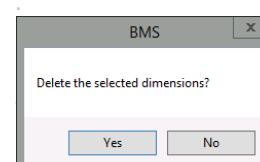
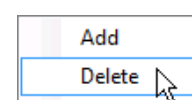
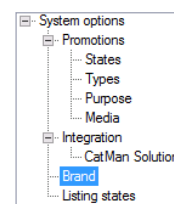
How to add a color-line

- 1 Click on the **"File"** icon on the upper left corner of the application window and from the list click on **"System Options"**. A new window opens on the screen.
- 2 On the list on the left click on **"Brand"** and the corresponding field will appear on the main screen of the **"System Options"** window.
- 3 Right-click anywhere and click on **"Add"** to add a new color-line. It is automatically saved.



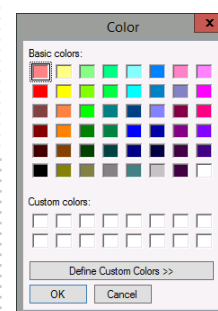
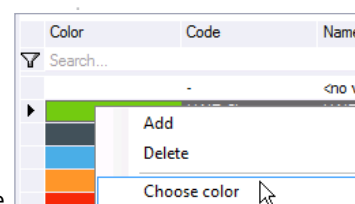
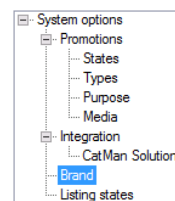
How to delete a color-line

- 1 On the list on the left click on **"Brand"** and the corresponding field will appear on the main screen of the **"System Options"** window.
- 2 Right-click the color-line you want to delete and then click **"Delete"**. A confirmation window will appear on the screen asking for your approval.
- 3 Click **"Yes"** or **"No"** to finalize your action.



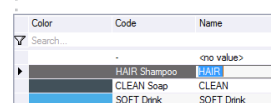
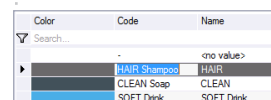
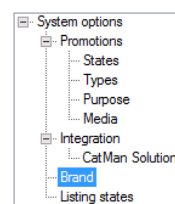
How to change color in a color-line

- 1 On the list on the left click on **"Brand"** and the corresponding field will appear on the main screen of the **"System Options"** window.
- 2 Click the column which displays the color of the color-line you want to change and then right-click on the box.
- 3 Click on **"Choose Color"** and a new window will appear on the screen showing the color options you can choose.
- 3 Choose the color you want and click **"OK"**. Your changes are automatically saved.



How to change name in a color-line

- 1 On the list on the left click on **"Brand"** and the corresponding field will appear on the main screen of the **"System Options"** window.
- 2 Click the column which displays the name of the color-line you want to rename and the box will be ready to be edited.
- 3 Type the new name you want to give to the line and press **"Enter"** on your keyboard. The new name has been saved automatically.



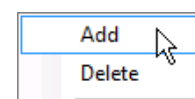
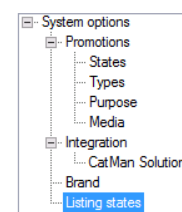
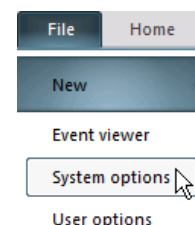
LISTING STATES CONFIGURATION



In this System Options field you can segment with pre-defined states your Listings in Products and Customers. In order to do this you have to define and create your segment variables.

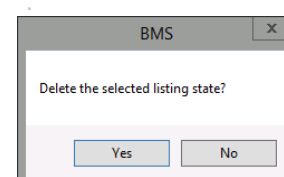
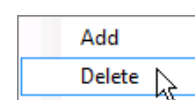
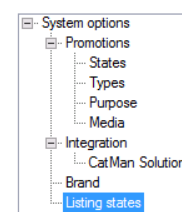
How to add a Listing State

- 1 Click on the **"File"** icon on the upper left corner of the application window and from the list click on **"System Options"**. A new window opens on the screen.
- 2 On the list on the left click on **"Listing States"** and the corresponding field will appear on the main screen of the **"System Options"** window.
- 3 Right-click anywhere and click on **"Add"** to add a new Listing state. It is automatically saved.



How to delete a Listing State

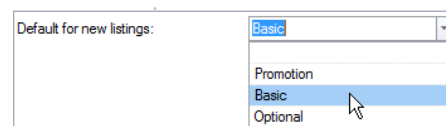
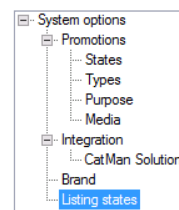
- 1 On the list on the left click on **"Listing States"** and the corresponding field will appear on the main screen of the **"System Options"** window.
- 2 Right-click the Listing state line you want to delete and then click **"Delete"**. A confirmation window will appear on the screen asking for your approval.
- 3 Click **"Yes"** or **"No"** to finalize your action.



LISTING STATES CONFIGURATION

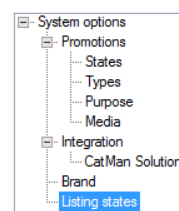
How to set as Default a Listing State

- 1 On the list on the left click on **"Listing States"** and the corresponding field will appear on the main screen of the **"System Options"** window.
- 2 Click on the drop down list of the **"Default for new listings"** field and select the one you want to set as a default.



How to change name in a Listing State

- 1 On the list on the left click on **"Listing States"** and the corresponding field will appear on the main screen of the **"System Options"** window.
- 2 Click the column which displays the name of the Listing state you want to rename and the box will be ready to be edited.
- 3 Type the new name you want to give and press **"Enter"** on your keyboard. The new name has been saved automatically.

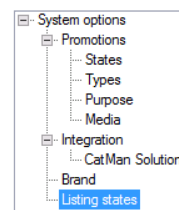


Rank	Listing state	Listing code
1	Optional	O
2	Basic	B
3	Promotion	P

LISTING STATES CONFIGURATION

How to change Rank and Listing code

- 1 On the list on the left click on **"Listing States"** and the corresponding field will appear on the main screen of the **"System Options"** window.
- 2 Click the column which you want to change the code or the number and the field will be ready to be edited.
- 3 Type the new code or number you want to give and press **"Enter"** on your keyboard. The new changes have been saved automatically.



Rank	Listing state	Listing code
Search...		
	Optional	O
2	Basic	B
3	Promotion	P

Rank	Listing state	Listing code
Search...		
	Optional	O
2	Basic	B
3	Promotion	P

Upgrade to BMS full version

The Promotion Starter for CatMan is a downscaled version of BMS and offers limited features specifically targeted towards CatMan Solutions users.

However, it is possible to upgrade your edition to an edition with more features. Please see table below. Contact Effectmakers if you want to hear more.

Effectmakers BMS editions 2017

Product versions			
Promotion Starter for CatMan Promotion registration Select Starter if you want to: Have an easy upload of promotions to CatMan Solution	Promotion Basic Promotion management Select Basic if you want to: Improve promotion forecasting	Promotion Advanced Promotion optimization Select Advanced if you want to: Understand and improve promotional efficiency, get P&L insight and support for provisions & settlements	Enterprise Business management system Select Enterprise if you want to: Have a full blown customers business planning system
Features			
Product master data Product hierarchy Promotion allowances Visual planning calendar Customer listing and i-prices	Starter, plus: Unit forecast per product Display planning Forecast based on history Delivery profile	Basic, plus: Pre/post evaluation with full P&L Provisions Settlement process Basic reporting and analysis Office automation	Advanced, plus: Baseline forecast Baseline cannibalization Performance monitoring Reports and dashboards Microsoft Analysis Cube for Excel Plus a lot more...
Interfaces from BMS included			
Upload to CatMan	CatMan Forecast Fieldsales	CatMan Forecast Fieldsales Standard ERP master data	CatMan Forecast Fieldsales Standard ERP master data ERP Sales data
Support			
Email helpdesk	Email helpdesk	Email helpdesk Phone support	Email helpdesk Phone support Dedicated account manager