

## Introduction

This Quick guide will show you how to create a new promotion. The data that needs to be filled in is; customer, period, products, purpose and type, promotion, forecast volume and allowance. In the end you can do a pre-evaluation with a full P&L.

## Quick guide concept

Through a number of easy steps you learn how to use the software.

Each step is numbered and defines a phase. Each phase contains a short description and an illustration to show how to navigate or operate in the software. The guide ends with a Q&A.



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



Tips and tricks are marked with an Info-icon.

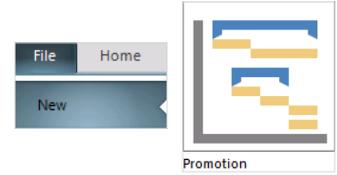


Questions & Answers note relevant to the topic at hand.

# Creating promotions

## 1 Open new (empty) promotion

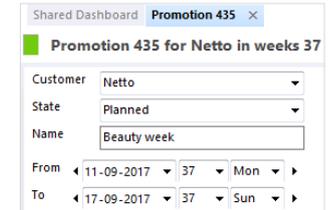
Go to File/New in upper left corner and click on the Promotion icon.  
A new tab (window) opens.



## 2 Select a customer

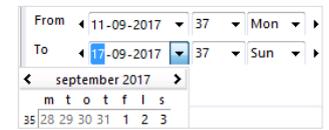
The promotion is given an ID: in this case 435.  
Select customer in the drop-down list.  
Name the promotion, so you can relate to it later.

*Note: Promotion states are pre-configured in System options.*



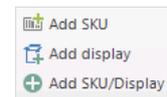
## 3 In-store period

Define the promotion in-store period from the calendar or use the week or day drop-down lists to adjust. BMS will set the end date based on default promotion setting (can be overruled).



## 4 Products on promotion

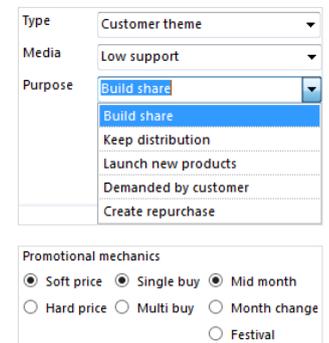
Select the products (SKU or display) for the promotion by clicking on Add SKU icon in the ribbon. This opens a list of products. Select product(s) and click Add.



## 5 Define purpose and type of promotion

Purpose, type and media is specifically defined by the company.  
Select from drop-down menus.

Define promotional mechanics by clicking on the three options for price, multi or single buy and timing.



## 6 Forecast volume

There are two different ways to display your forecast; one column or two columns. This can be setup in System options in Promotion forecast by an administrator.

Add unit forecast in the Forecast column.

If you have both forecast columns for consumer units and sales units, enter units in Forecast (Consumer units) and the sales units in Forecast (Sales units).

Products			
Brand	Item number	Product name	Forecast (Consumer units)
Search...			
HAIR (4 items)			Units: 40,001
	1000	HAIR Shampoo Normal	13,297
	1001	HAIR Shampoo Colored	8,605
	1002	HAIR Shampoo Shiny	8,982
	1003	HAIR Shampoo Dry	9,117



*Consumer units for SKU, numbers of display for displays.*



*Select all products and press F4 or edit: Add total forecast in "Total for selected products". BMS will allocate based on sales.*

## Quick guide for BMS



Right-click in Delivery profile window and select Add to first or Add to last to add more week options.



If you don't want a real-time update of the forecast P&L, use the arrow keys to navigate in the fields instead of pressing enter.



The delivery profile can be no more or no less than 100%. If this is not the case a warning is displayed.

### 7 Variable promotion allowance

Add Variable promotion allowance to all/the relevant SKU's if needed.



Variable promotion allowance is a title set up by an administrator in System options.



Make sure the calculation method for the variable promotion is set as a % or amount. If it is not set, the allowance will not be calculated.



Calculation method can be set as default under: Customer/Settings/Promotional settings: Default calculation method.

### 8 Fixed promotion allowance

Add, if needed, a fixed allowance for the promotion. Click on the icon in ribbon: Add fixed allowance: A line is added in the Allowance tab: Enter the fixed allowance amount here.

### 9 Check delivery

In the delivery profile, the default delivery on the customer is displayed.

Adjust if necessary.

If you want the delivery to start a specific date every month, click on Delivery override to force forecast to a specific date.



If more weeks are needed, right-click and click an Add to first (or last) to get more week options.

### 10 Pre-evaluation

Check P&L for the promotion and adjust promotion if needed to do a pre-evaluation of the promotion.

*NB: P&L are company specific.*



The P&L is displayed as setup in System options.



Right-click on P&L to get more P&L options or to copy to Excel.



If you have entered promotion price per product in same window, you can also see the customer margin.

Variable Promotion Allowance 1	
	15,00
	15,00
	15,00
	15,00

#### Add fixed allowance

Fixed allowance			
Description	Allocate to	Forecast amount	Key
% Promo Allow		70.000	
€ Promo Allow		60.000	
Fixed allowance		50.000	

Delivery profile				
Profile name				
Week	Month	Delivery override	%	Value
Display (2 items)				
35	8/9		100	0
36	9		0	0
SKU (2 items)				
35	8/9	01-09-2016	60	24.001
36	9		40	16.000

	Total promotion				Selected rows			
	Forecast	%	Sell-out estimate	%	Forecast	%	Sell-out estimate	%
Displays	40.001		40.001		40.001		40.001	
	0		0		0		0	
<b>Gross sales</b>	<b>857.613</b>	<b>100,0</b>	<b>857.613</b>	<b>100,0</b>	<b>857.613</b>		<b>857.613</b>	<b>100,0</b>
<b>Invoiced sales</b>	<b>857.613</b>	<b>100,0</b>	<b>857.613</b>	<b>100,0</b>	<b>857.613</b>		<b>857.613</b>	<b>100,0</b>
Variable Promotion Allowance 1	128.642	15,0	128.642	15,0	128.642	15,0	128.642	15,0
Fixed Promotion Allowance	50.000	5,8	50.000	5,8	50.000	5,8	50.000	5,8
<b>Net sales</b>	<b>678.971</b>	<b>100,0</b>	<b>678.971</b>	<b>100,0</b>	<b>678.971</b>		<b>678.971</b>	<b>100,0</b>
COGS	181.083	26,7	181.083	26,7	181.083	26,7	181.083	26,7
Distribution (Logistic) costs	10.000	1,5	10.000	1,5	10.000	1,5	10.000	1,5
<b>Sales margin</b>	<b>487.887</b>	<b>71,9</b>	<b>487.887</b>	<b>71,9</b>	<b>487.887</b>		<b>487.887</b>	<b>71,9</b>
<b>Sales Contribution</b>	<b>487.887</b>	<b>71,9</b>	<b>487.887</b>	<b>71,9</b>	<b>487.887</b>		<b>487.887</b>	<b>71,9</b>
Net sales pr. unit	16,97		16,97		16,97		16,97	
<b>Net Incr. Uplift</b>	<b>0</b>	<b>1,0</b>	<b>0</b>	<b>0</b>	<b>0</b>		<b>0</b>	<b>0</b>
<b>ROI %</b>	<b>0</b>	<b>-6,7</b>	<b>0</b>	<b>0</b>	<b>0</b>		<b>0</b>	<b>0</b>
Total investment %	0	26,3	0	0	0	0	0	0
Gross to Net %	0	320,8	0	0	0	0	0	0
<b>Customer Revenue (excl. VAT)</b>	<b>478.412</b>		<b>478.412</b>		<b>478.412</b>		<b>478.412</b>	
Customer cost of goods (excl. VAT)	678.971		678.971		678.971		678.971	
<b>Customer Margin (excl. VAT)</b>	<b>-200.559</b>	<b>-41,9</b>	<b>-200.559</b>	<b>-41,9</b>	<b>-200.559</b>		<b>-200.559</b>	<b>-41,9</b>
Margin pr. unit (excl. VAT)	-5,01		-5,01		-5,01		-5,01	

### Other options

#### **Update more products in one go**

You can edit more products in one go by marking the products you want to edit and click Edit in the ribbon or click F4.

You have three options. You can update one product at a time, by brand or all products in the promotion, when you make changes in the Edit pop-up window.

To update by brand, click the brand, and the products within this brand will all be updated at once.

To update all categories, mark all products when clicking Edit or F4.

When you have marked more than one product (e.g. brand or all products) you can either enter Sell out estimate pr. item or a total for the marked products in Total for selected.

When entering the forecasted volume Pr. item every single product you have marked, will be updated with the new volume.

If you enter in Total for selected, you enter a sum for the marked products. In this way, BMS will automatically divide the sum into the number of marked products.

#### **Conflicts**

If you have two promotions with the same product, BMS warns about you having a conflict in the Promotion conflict window. This can be set up in System options, if you want promotions with the same products in more stores.

#### **Sell-out estimate**

BMS contains two sell-out estimate columns; Sell-out estimate (Consumer units) and Sell-out estimate (Sales units). Enter what you expect to sell in the store(s) in both consumer units and sales units.

## Creating promotions

### Questions & Answers



*I cannot find the promotion that I created just yesterday. I think it might got deleted. How can I see what happened?*

Whenever you create, update or delete promotions, launches etc., it will be logged in the event log. This data cannot be retrieved, but it is possible to recreate a promotion manually based on the data contained in the event log. This information is only accessible to the appropriate users at the IT department.



*I am creating a new promotion, and now there is a warning displayed at the top of the promotion window. What does it mean?*

If you click the warning sign, you will get a message indicating that "there are products without a forecast". This probably means that you have added a SKU, a Display or a Selection without entering a forecast. You need to do this before you can proceed.



*Can I copy several promotions?*

Yes, you can. You just need to select the promotions you want to copy and click Copy.



*I have just finished creating a promotion and want to close the window, but I get an error message indicating that the delivery profile is < > 100%, please correct. What does this mean?*

It probably means that the delivery profile is not equal to 100%. A delivery profile can be no more or no less than 100%. You need to make the necessary adjustments to the delivery profile before you can proceed.



*I have created a new promotion, added a product, but it calculates no price. Why is that?*

This is probably because, the gross price is missing. Check gross price list.



*Promotion is placed in the wrong month in our reports. What could have caused this?*

Check delivery profile promotion.