Settling Promotions

1 **Open promotion for settlement**

In the ribbon: Click Promotions and Promotion calendar or Promotion list.

Promotion calendar/list opens in a new window. Double-click the promotion you want to settle.

2 **Open the Settle window**

Click Settle in the upper right corner in the promotion window.

3 **Add settlement: Variable allowance**

Click Add. BMS opens:
    1) A line with variable allowance and the opportunity to enter Customer invoice number.
    2) A list with the campaign products.

If the promotion has fixed and variable allowances a dialog box pops up: Always start with variable allowance.

4 **Enter Customer Invoice Number**

Enter in the field the customer invoice number if needed.

5 **Enter actual amount of sold units**

Enter amount of sold units in the column Settlement (Consumer units) in the table underneath. BMS calculates allowance in DKK.

Tip: If the amount is not correct for a product, correct the amount directly in the table for the product.

For variable allowances type the settled amount in per product in the list below.
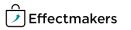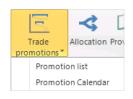For fixed allowances type in the total settled amount in the list above.

6 **Add settlement: Fixed allowance**

Click Add Settlement. A box pops up: choose Fixed allowance.

Tip: If no fixed allowance is planned for the promotion, the box will not appear.

7 **Enter amount and invoice number**

Enter Customer Invoice Number (Can be the same as for variable) and the amount excluded VAT in Settle Amount.

8 Approve settlement

When the settlement is done, click on Approve settlement and the promotion state (State in upper left corner of the window) will automatically be changed to partly settled.

Put a check mark in Fully settled: Variable and/or Fixed, when you want to settle the promotion. When you click in Fully settled for the allowances, the state changes to settled.

NB: BMS sends a file to ERP system with settlement information.

Notice that the Settle state is preconfigured in Promotion states in System options by an administrator.

Add	Delete
Approve	

Fully settled:
☑ Variable ☑ Fixed