

Introduction

This Quick guide will show you how to settle promotions. You need to add a variable allowance, enter customer invoice number, amount of units, add fixed allowance if you have already planned it, and in the end approve your settlement. In the end you have settled a promotion.

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.



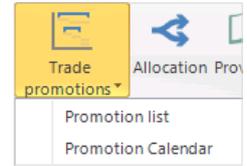
Questions & Answers note relevant to the topic at hand.

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.

Customer Invoice N...	Settlement Type
12456	Variable Allowance

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.

Settlement	% Promo Allow
500	53,20
500	51,87
500	51,87
500	51,87

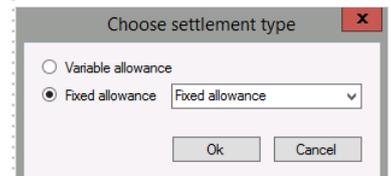


For variable allowances type the settled amount in per product in the list below.
For fixed allowances type in the total settled amount in the list above.

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.

Customer Invoice N...	Settlement Type	Fixed Allowance	Settled Amount
12456	Variable Allowance		209
68566	Fixed Allowance	Fixed allowance	540

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:	
<input checked="" type="checkbox"/> Variable	<input checked="" type="checkbox"/> Fixed