



EFFECTMAKERS BMS

GETTING STARTED

FIRST TIME SETUP IN 10 EASY STEPS



Effectmakers

VERSION 17.4

Getting Started

First time setup in 10 easy steps.

Effectmakers BMS is a software tool for Business planning and Trade promotion management. The solution is easy to implement, yet it gives you powerful functionality for planning and improving your business.

This Getting started document is a 10 step guide, that helps you preparing BMS for first time use.

Each step in the guide will give a short description of what to do and which areas to address in order to setup BMS.

The Getting started document should be used together with our 2 month free BMS trial in order for you to test the software using this guide.

The free trial give you access to two databases. One with sample data and one without sample data. Use the empty database when using the Getting Started document.

We strongly encourage you to try BMS with a subset of your own business data during the trial period.

After completing this guide, you will understand the basics of BMS, how it works and hopefully, how it can help you improve your business.

We will refer to Quick guides throughout this document. These describe, in detail, how to carry out different tasks..

Quick guides are available for download from our webpage www.effectmakers.com/support

If you cannot find what you are looking for in the Quick guides, we provide free e-mail support throughout your evaluation of BMS . Contact our support at: support@effectmakers.com

The 10 steps:

Master data:

- ① Customers
- ① Products and prices
- ① Setup P&L
- ① Trade terms
- ① Listings

Planning:

- ① Forecast baseline
- ① Plan and evaluate trade promotions
- ① Other planning options

Reporting and Cube:

- ① Dashboards, reports & Cube

Configuration:

- ① Configuration and interfaces

Customers

The **first step** is to create customers in the system as all planning is done on customer level.

For the purpose of this trial we recommend you create 3-5 customers. You can always add and remove customers later.

The customers have to be created manually. An import of a customer list from i.e. an Excel file is not supported by default, but if needed can be supplied manually by Effectmakers (does not apply for the purpose of this trial).

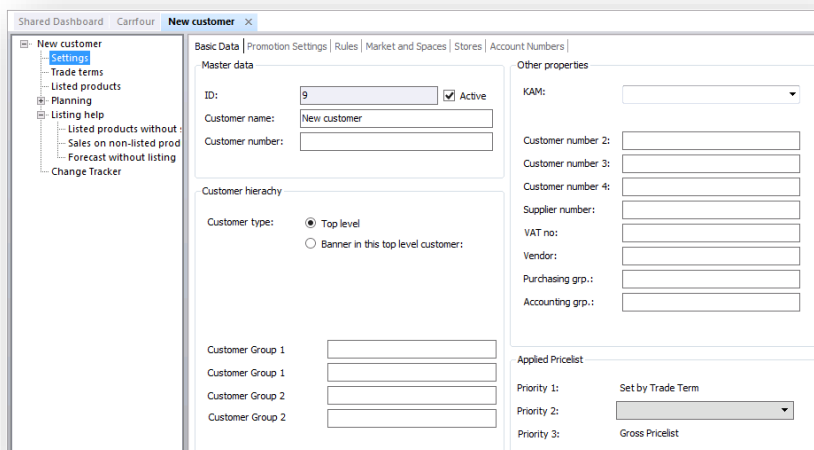
You only need to fill out basic Master data at this point (Customer name and type)

Customers can be created on two levels: On top level, (wholesaler) or on banner level. (chains below top level customer/in-direct customer). It is possible for a Customer to have multiple Banners.

All new customers will be saved in the system automatically.

There are many advanced settings available. It is e.g. possible to set default promotion settings to a specific customer. This includes promotion allowances including promotion delivery profile. These settings will be included on all new promotions set on the customer. For more info on how to create a new customer please read the Quick guide.

Creating customers



Products and prices

The next step, you need to define and choose are the products and pricing you want in BMS. There are two ways to setup a new product. You can create them manually by entering the raw product and price data directly into BMS or you can import the data from e.g. your ERP system (or via an Excel sheet).

For the purpose of this trial we recommend you create 5-8 products. You can always add and remove products later.

When creating a new product you have many different settings you can control. In the **product hierarchy** you can define dimensions like sub brand, packaging, size etc. You also control cost prices, gross prices, net prices and other costs per product.

When you have created a new product, the product will automatically be saved in the system.

Products and pricing belong to **Master Data** and the more precise you fill out these fields the more precise your later forecast and reports will be.

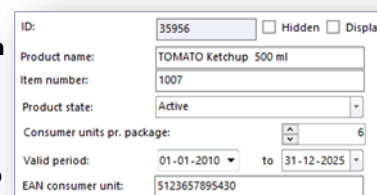
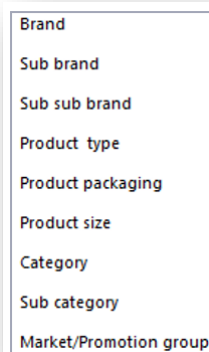
After creating a product, you can export it to Excel and generate a template for import new products in the future.

All entered or changed data can automatically be transferred to your ERP system. It's easy and you are in full control all the way.

One of the practical functionalities in BMS is that all changes in data are automatically updated throughout the whole system at all times.

Read more details in the Quick guide:

Creating products manually

Information to be filled in to create products.

Setup P&L

The P&L tables are crucial to any companies' business as this is where you get an overview of the economical situation.

When data in BMS are entered or updated the P&L will always automatically calculate the new results in *real time* so you will always get an accurate P&L.

In **system options** you can see all the P&L elements available and terminology, names in BMS, customer name and how the field is calculated.

To create a new **P&L table** you go to your **dashboard/edit layout** and click **add element** and choose **P&L**.

The P&L table setup in BMS is very flexible and allows you to create a variety of different P&L's like a Customer P&L, a Brand P&L or perhaps a Monthly P&L. You decide. Be aware that the P&L area of the system is divided into On- and Off invoice sections.

"**On invoice**" is the section that calculates the total income over a particular period of time. Among other inputs, it uses gross sales, on invoice trade terms and promotion allowance data for its calculations.

The "**Off invoice**" section is rather more advanced. With the right inputs it is intended to calculate "Net Price", "Sales Margin" and "Sales Contribution"

Find more technical information here:

[Reference Guide](#)

P&L setup

Visible	Name	Custom text	Calculation
<input checked="" type="checkbox"/>	Gross price	Gross Price	
<input checked="" type="checkbox"/>	Returns 1	Returns forecast	
<input checked="" type="checkbox"/>	Invoice discount 1	Contract Discount %	Amount pr. sales unit
<input checked="" type="checkbox"/>	Invoice discount 2	Other Discount %	% of Gross
<input checked="" type="checkbox"/>	Invoice discount 3	Logistic rebate %	% of Balance
<input checked="" type="checkbox"/>	Invoice discount 4	Range	% of Gross
<input checked="" type="checkbox"/>	Invoice discount 5	Invoice Discount 5	
<input checked="" type="checkbox"/>	Invoice discount 6	Invoice Discount 6	
<input checked="" type="checkbox"/>	Invoice discount 7	Invoice Discount 7	
<input checked="" type="checkbox"/>	Variable promotion discount on invoice	Var. Promo. Allow. on Invoice	
<input checked="" type="checkbox"/>	Fixed promotion allowance on invoice	Fixed Promo. Allow. on Invoice	
<input checked="" type="checkbox"/>	Clearance		
<input checked="" type="checkbox"/>	Invoice price	Invoiced sales	
<input checked="" type="checkbox"/>	Off invoice discount 1	Cash discount	User input in planning module
<input checked="" type="checkbox"/>	Off invoice discount 2	Joint Marketing%	% of Invoice
<input checked="" type="checkbox"/>	Off invoice discount 3	Loyalty %	% of Invoice
<input checked="" type="checkbox"/>	Off invoice discount 4	Range/Choice%	% of Invoice
<input checked="" type="checkbox"/>	Off invoice discount 5	Off Invoice Discount 5	
<input checked="" type="checkbox"/>	Off invoice discount 6	Off Invoice Discount 6	
<input checked="" type="checkbox"/>	Off invoice discount 7	Off Invoice Discount 7	

Estimate P&L, Current year

	COOP ± BODY	CLEAN ±	FABRIC ±
Units	37.872	445.599	437.996
Displays	0	0	0
Gross sales	523.005	6.938.331	6.943.647
Returns forecast	0	0	0
Contract discounts %	44.455	623.377	589.074
Other %	21.772	362.456	339.684
Invoiced sales	456.778	5.952.498	6.014.889
Cash discount	14.788	214.088	217.208
Joint Marketing%	0	0	0
Loyalty %	6.884	100.845	103.029
Net sales	435.107	5.637.564	5.694.652
COGS	150.961	1.994.387	2.018.214
Distribution (Logistic) costs	9.497	109.846	109.674
Sales margin	274.649	3.533.332	3.566.764

Example of a P&L table.

Trade terms

Trade terms covers the different types of rebates, discounts etc. contracted on the customer.

In BMS you have the possibility to create the trade terms as a set of discounts, or as individual discount conditions. This can be setup from **System Options/General option**.

Since the trade terms influence your P&L it is therefore crucial to enter these into BMS.

The actual trade terms data contain many options and are totally customizable. Go to **System options/P&L setup**. The discounts are divided into two groups: **on invoice** and **off invoice**, with each containing several data entries. Once these are set up according to the

needs of the company, the relevant trade terms data fields will appear, as defined through the system configuration.

When you have entered your trade terms, you can export them to Excel and use them as template for trade terms in the future by importing them again. This can be helpful, for a faster update of the trade terms in the system.

In SAP this function is called conditions.

Find more explanation in the Quick guide:

[Managing trade terms](#)

Trade terms

☒ Trade terms are handled as sets of discounts

☐ Trade terms are individual conditions

☐ Trade terms are loaded from custom interface

Condition ID	P&L line	Value calculation	From Date	To Date	Value
3	Joint Marketing%	% of Invoice	01-01-2017	31-12-2017	5
4	Contract Discou...	Amount pr. sale...	06-01-2017	31-12-2018	5
5	Loyalty %	% of Invoice	01-01-2016	31-12-2018	10

Individual Trade term setup in BMS.

Trade term as sets of discounts

Selected trade term			
Winegum			
Discount name	Percent		Amount
Contract discounts %	50,00 %	% of Balance	0,00
Other %	0,00 %	% of Gross	0,00
Logistic rebate %	0,00 %	% of Balance	0,00
Range	0,00 %	% of Gross	0,00
= Invoiceprice			100,00
Joint Marketing%	0,00 %	% of Invoice	0,00
Loyalty %	0,00 %	% of Invoice	0,00
Range/Choice%	0,00 %	% of Invoice	0,00

Listings

If you are working with product listings, BMS gives you a good overview of the products that are listed to a specific customer.

To add listings to the customer, you have two options: You can add products one by one or multi-add products by marking more listings at the same time. If you need to add more listings at once, it is easier to mark all listings in one go. This saves time.

When you have added listings, you can export them to Excel and use them as templates for future use.

Listings are customisable, which means that

ranks, workflows and default assigning of the listings can be customised according to the needs of the company.

BMS contains a "Listing help" functionality in the navigation panel of the customer. This informs you if there are any errors in the listings. In this way, you do not need to search for the errors by yourself.

Find more explanation in the Quick guide:

[Managing listings](#)

Example of listings in BMS.

Planning Mask	Brand	Product name	Item number	Display	Product state	Listing state	Customer item number	Banners
BODY	BODY	BODY Gel Durt...	1038	<input type="checkbox"/>	Active	G2		Kickly, Superbruggen, Daglig Brugsen
BODY	BODY	BODY Gel Ess...	1040	<input type="checkbox"/>	Active	G2		Kickly, Superbruggen, Daglig Brugsen
BODY	BODY	BODY Gel Hydra...	1039	<input type="checkbox"/>	Left over	G3	123454	Kickly, Superbruggen, Daglig Brugsen
BODY	BODY	BODY Gel Hydra...	1041	<input type="checkbox"/>	Active	G2		Kickly, Superbruggen, Daglig Brugsen
BODY	BODY	BODY Gel Invig...	1034	<input type="checkbox"/>	Active	G2		Kickly, Superbruggen, Daglig Brugsen
BODY	BODY	BODY Gel mik k...	1035	<input type="checkbox"/>	Active	G2		Kickly, Superbruggen, Daglig Brugsen
BODY	BODY	BODY Gel Revit...	1031	<input type="checkbox"/>	Active	G3		Kickly, Superbruggen, Daglig Brugsen
BODY	BODY	BODY Gel Sens...	1037	<input checked="" type="checkbox"/>	Active	G2		Kickly, Superbruggen, Daglig Brugsen
BODY	BODY	BODY Gel Toning	1032	<input type="checkbox"/>	Active	G3		Kickly, Superbruggen, Daglig Brugsen
BODY	BODY	BODY Milk & H...	1036	<input type="checkbox"/>	Active	G1		Kickly, Superbruggen, Daglig Brugsen
BODY	BODY	BODY Milk & H...	1044	<input type="checkbox"/>	Active	G3		Kickly, Superbruggen, Daglig Brugsen
BODY	BODY	BODY Milk Display	1042	<input checked="" type="checkbox"/>	Active	G3		Kickly, Superbruggen, Daglig Brugsen
BODY	BODY	BODY Natural ...	1039	<input type="checkbox"/>	Active	G1		Kickly, Superbruggen, Daglig Brugsen
BODY	BODY	BODY Natural ...	1043	<input type="checkbox"/>	Active	G3		Kickly, Superbruggen, Daglig Brugsen
# Shampoo (4 items)								
# HAIR (4 items)								
HAIR	HAIR	HAIR Shampoo ...	1001	<input type="checkbox"/>	Active	G3		Kickly, Superbruggen, Daglig Brugsen
HAIR	HAIR	HAIR Shampoo ...	1003	<input type="checkbox"/>	Active	G3		Kickly, Superbruggen, Daglig Brugsen
HAIR	HAIR	HAIR Shampoo ...	1000	<input type="checkbox"/>	Active	G3		Kickly, Superbruggen, Daglig Brugsen
HAIR	HAIR	HAIR Shampoo ...	1002	<input type="checkbox"/>	Active	G3		Kickly, Superbruggen, Daglig Brugsen
# Cleaning (31 items)								
# Liq. Cleaners (7 items)								
# LIQUID (7 items)								
LIQUID	LIQUID	LIQUID Cleaner ...	1021	<input type="checkbox"/>	Active	G3		Kickly, Superbruggen, Daglig Brugsen
LIQUID	LIQUID	LIQUID Cleaner ...	1020	<input type="checkbox"/>	Active	G3		Kickly, Superbruggen, Daglig Brugsen
LIQUID	LIQUID	LIQUID Cleaner ...	1025	<input checked="" type="checkbox"/>	Active	G3		Kickly, Superbruggen, Daglig Brugsen
LIQUID	LIQUID	LIQUID Cleaner ...	1022	<input type="checkbox"/>	Active	G3		Kickly, Superbruggen, Daglig Brugsen
LIQUID	LIQUID	LIQUID Cleaner ...	1029	<input type="checkbox"/>	Active	G3		Kickly, Superbruggen, Daglig Brugsen
LIQUID	LIQUID	LIQUID Cleaner ...	1026	<input type="checkbox"/>	Active	G3		Kickly, Superbruggen, Daglig Brugsen
LIQUID	LIQUID	LIQUID Cleaner ...	1023	<input type="checkbox"/>	Active	G3		Kickly, Superbruggen, Daglig Brugsen

Baseline

It's easy to plan the baseline in BMS.

You can e.g. do baseline planning on customer level. The customer structure in BMS has options for both direct independent customers and indirect customer.

The input can be planned on weeks or by month - both with smart features for filling in the future periods.

All planning ends up on SKU level, however, the input can also be done on aggregated levels with automatic cascading down to SKUs.

No matter how the input is entered, BMS will always calculate the P&L per product with all correct prices and conditions.

Baseline is divided into two separate Streams: Predicted Baseline and Baseline. The reason these Streams exist is, in order to evaluate a particular promotion, one needs a point of comparison. Thus, Baseline and Predicted Baseline express the expected sales, if there were no promotions in mind. Baseline Stream is based on values provided by the end user. Baseline window only allows input in the column "Forecast Units". However, by using planning

masks the user is capable of setting a baseline on a single SKU, brand or a whole customer. Predicted Baseline (Pred. Baseline) Stream provides the user with a calculated value based on the data from previous six months of sales. It is possible to copy the values from Predicted Baseline stream to the Baseline stream

The input can be done in units, packages, volume (liters or weight) or even in monetary value.

Baseline allows you to make graphical illustrations to compare your past and predict the future.

The layout of the Baseline Planning view is full-customisable and each user of the same database can have, alongside with the preconfigured from the organisation views, an individual Baseline view.

Find more explanation in the Quick guide:

[Planning baseline](#)

Trade promotions

It's easy to create your own promotions.

You start by choosing product, customer and timing and from here you have a lot of advanced options.

You have the possibility to enter your forecasted earnings based on the promotion. When the promotion is over, you can import the figures of the promotion to see, if you actually sold what you forecasted.

BMS automatically calculates provisions for the variable and fixed promotion allowances on your promotions. You will always have control over your commitments.

The provisions can easily be exported and integrated into your ERP system.

Provisions support your accounting processes for month-endings and can transfer the data to your ERP system. Provisions in BMS are integrated with your settlement feature to let you keep track of, which promotions are settled or partly settled.

The provision functionality is linked with the settlement process supported by BMS. This means that when you settle a promotion in BMS, the provision is automatically recalculated.

You can copy the promotions in several ways. The copied promotions can be used for future

promotions that are similar to the original promotion. Then you can rename the copy and make small changes to adapt it to the new promotion.

You can replace products in your promotions. You can e.g. use this functionality when copying promotions and you want to replace one of the products in it, if a variant discontinues, a product is out of stock etc.

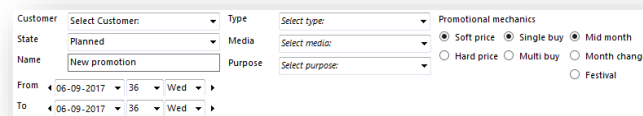
When the promotion has ended, you can evaluate it by comparing your forecasted sales during the promotion based on your actual sales.

Find more explanation in the Quick guides:

- [!\[\]\(a724a4a68298d6dff85fe378e838a60a_img.jpg\) **Creating promotions**](#)
- [!\[\]\(e45f0f4def98e1246d9487bb157beff5_img.jpg\) **Evaluating promotions**](#)
- [!\[\]\(88bfc90d98dd4d34739a3a724db7c68c_img.jpg\) **Settling promotions**](#)
- [!\[\]\(ccf2eae7cfca7109675c84141018761f_img.jpg\) **Managing provisions**](#)

To get an understanding of how to navigate promotions between creation and evaluation, read the Quick guide:

- [!\[\]\(a16a19bbc0e991a431a3f945e52ea4ee_img.jpg\) **Working with promotions**](#)



Picture of information to be filled out to create promotion.

Other planning options

Launches - This part of the system allows you to plan and forecast new products into the market. It provides you with an opportunity to differentiate between the existing and new products.

A launch period is usually six month, after which the product will automatically be listed on the relevant customers. During these six months, all the work in terms of planning and forecasting of new products is done in Launch. Each product pr. customer will get six independent forecasting and planning columns, which then can be used to follow the development very closely

You can also forecast launches. Forecast how much you expect your sales to be during the first five months of the launch including your forecasted launch pipe units. You can also import the forecasted and predicted figures to the launches.

When all the forecasted figures are entered, you have to approve the launch. Otherwise it does

not count as done, and it will therefore not be displayed in your P&L.

Planning / Other costs define the costs to the customer, which are not related to product units. Enter the relevant figures into the table of "Other costs". This feature works almost like baseline. Here you just need to enter Fixed promo allow, input. Find more info in the Quick guide "Planning baseline" in the "Other costs"-section.

Find more explanation in the Quick guides:

- [!\[\]\(0cbc7cdca7d071aa179d7aa169df42b4_img.jpg\) **Creating launches**](#)
- [!\[\]\(71ef5658add63e9bd9a28ff0124ff14f_img.jpg\) **Forecasting launches**](#)
- [!\[\]\(12f4526890c2695280d8161cc667639a_img.jpg\) **Planning baseline**](#)

Launch ID	Launch name	Launch description	First Delivery Date
Search...			
21	Launch of body gel		01-04-2017
22	Ketchup	New ketchup	17-04-2017
24	Fabric launch		01-05-2017

Picture of launch list in BMS.

Dashboards & reports

Create dashboards & reports to get an overview of the business.

Dashboards are displayed as the “front page”, when you enter BMS. Reports are saved as documents, you can open anytime. However, reports are still displayed the same way as dashboards.

There are two types of dashboards and reports; shared dashboards/reports and my dashboards/reports. The shared dashboard are available for all coworkers, where my dashboards/reports are only visible for you.

They are created the same way by adding different elements to the window, and placing them. Which elements to choose depends on what your overall purpose with the dashboard/report is. There is one Quick guide for how to create dashboards/report, and also a Quick guide for each of the elements.

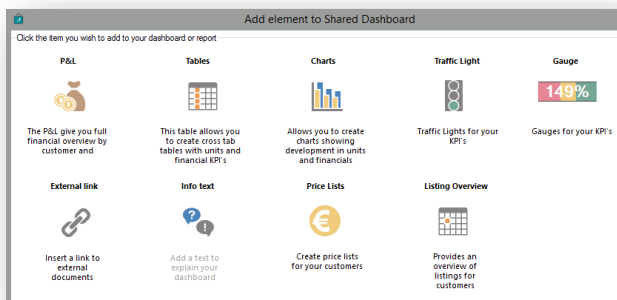
If you want a more advanced use of dashboards & reports you can use **Cube**. Cube is an individual tool

for crunching data. and generating advanced reports. Cube is not included in the BMS system as a standard but you can contact Effectmakers and we will provide access.

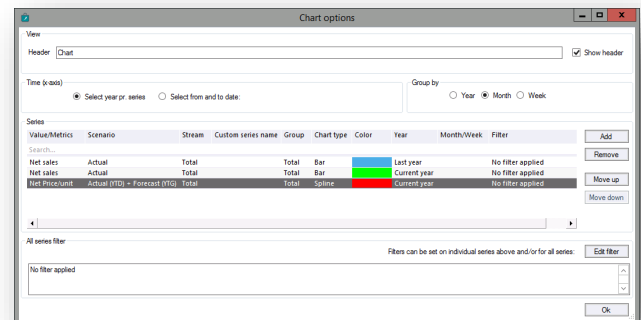
Get a more detailed description of how to do this in the Cube Quick guide.

Find more explanation in the Quick guides:

- [Dashboards & Reports](#)
- [... Charts](#)
- [... External link](#)
- [... Info text](#)
- [... KPI tables](#)
- [... Listing overview](#)
- [... P&L](#)
- [... Traffic light & gauge](#)
- [Connecting to BMS cube](#)



Add different elements to your dashboard.



Example of setting up a chart in dashboards & reports.

Configuration and interfaces

The last step of the guide addresses some of the different options you have to configure the system to your liking.

BMS is highly configurable, but as a start you can use the pre-defined settings.

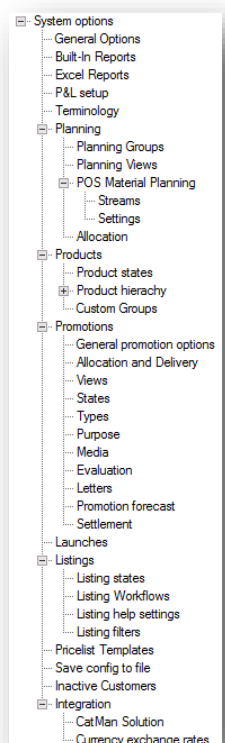
During the 2 month free BMS trial all functionalities are open for the user. When implementing the system, the BMS system administrator will also have access to a security feature where different security access levels can be defined for each user.

System options provide a lot of different ways to setup and configure BMS. A few of the functions have already been highlighted.

BMS can be used as a stand-alone program or together with your existing systems.

Interfaces are your “talk to other programs” and BMS comes with a number of predefined interfaces for e.g. Standard ERP master data and ERP sales data. Effectmakers can provide additional interfaces if required.

BMS can exchange data with most of the available 3rd part business software used today.



System options in BMS

What is your next move ...

Thank you for completing the Getting started guide.

We hope you now have a better understanding of what BMS can do for your company. It's a simple yet powerful tool to handle your business data and manage your promotions. You don't need to use all functions from day one, but you can select the functionality that makes the most sense for your company.

Please use the two month free trial to get familiar with BMS and experience the system. This is the best way to decide if BMS lives up to your expectations.

If you decide to implement BMS after the 2 month free trial you can continue using the set-up you have already done or you can get a new "empty" system.

There are different approaches on how to implement a business tools like BMS and it depends on company size, complexity and the capability of your implementation team.

We have two different approaches:

Enterprise Implementation – This is aimed at large Enterprises. Based on a pre-analysis workshop we will make you an offer and implementation plan. The Enterprise implementation projects is customized specifically to you.

Assisted Implementation – This is the Do-it-yourself method and means you have to do your own implementation plan. The plan has to ensure you set up BMS to match the business processes you want. We offer full e-mail and phone support and general advice during the process as part of the license fee.

Try it out yourself, and if you are in doubt of anything, read our Quick guides. If you cannot find, what you are looking for in these, you can contact our support at: support@effectmakers.com

Hope to hear from you soon

Regards,
Effectmakers

We offer

We offer a system for Business planning and Trade promotion management called BMS. The solution is easy to implement, yet it gives you powerful functionality for planning and improving your business. We listen to our customers and continue to develop BMS to fit your business needs.

Who is BMS for

BMS is for professional CPG companies in various industries who have strong team of Key account managers and business support staff that can utilize the system. BMS works well for result oriented companies who always seek to optimize their financial results and are ready to implement the right business processes to make this happen.

2-month free trial

We offer you a 2-month free trial to evaluate BMS.

Sign up directly from our webpage and you will receive your access codes by e-mail within minutes. No credit card or other commitment required.

Implementation

There are different approaches on how to implement a business tool and it depends on company size, complexity and the capability of your implementation team. We have two different approaches:

Enterprise Implementation – This is aimed at large Enterprises. Based on a pre-analysis workshop we will make you an offer and implementation plan. The Enterprise implementation project is customized specifically to you and it usually contain elements like project management, scope-definition, time plan, additional workshops, process descriptions, system configuration, interfaces/data mapping support, data validation, accepts, key-user training and end-user training. [Get in touch](#) to discuss your needs and setup a meeting.

Assisted Implementation – This is the Do-it-yourself method and means you have to do your own implementation plan. The plan has to ensure you set up BMS to match the business processes you want. We offer full e-mail and phone support and general advice during the process as part of the license fee.

Pricing

Price example:

Site license incl. 10 users (1 year):

From DDK 310.000,-/EURO 41.610

Assisted implementation is free but contact Effectmakers for an Enterprise implementation.

Prices are excl. vat and subject to change without prior notice. Always contact us for precise pricing.

Integration

Although BMS can work as a standalone system it can also be integrated with existing systems. It's easy to automatically load your ERP master data (products, prices, sales) into BMS by implementing our standard interface formats.

We also provide a number of standard output formats for use in field sales systems, demand planning and accounting systems. Our standard interfaces come with no additional development costs – customized interfaces are on quote.

Support

To get you started we offer a variety of documentation like the BMS Introduction, Getting Started, Technical reference document and more than 25+ practical Quick guides covering key areas.

All materials are available for download from effectmakers.com/support

If you have questions we are always ready to help

Monday to Friday - 9.00 to 16.00 CET

E-mail support: support@effectmakers.com

Technology

BMS is based on Microsoft development tools and hosted on Microsoft Azure which provide a solid foundation of cloud computing when it comes to both performance, security and compliance. On-premise hosting is not recommended, but available by arrangement.