

# Planning baseline

The Baseline planning, from the BMS version 17.8 and after, is part of the Planning Board. Thus, the following guide is valid for older versions.

## Introduction

This Quick guide will show you how to plan the baseline. The data that needs to be filled in is; returns forecast, planning sections, groups, levels, masks, and assigned customers. In the end you have planned the baseline.

## Quick guide concept

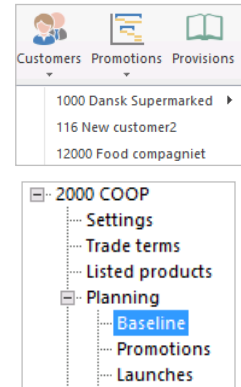
Through a number of easy steps you learn how to use the software.

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.

### 1 Open customer and find the baseline

Find Customer in the ribbon and choose the customer you want to work with. You can both choose top level customer and banner level customer.

In the menu to the left, you will find Baseline under Planning.



### 2 Select view

Select the view you want to see. The Current month view opens up by default.

Choose how you want to plan the baseline in the drop-down list under the different views.

This requires that the function is set up by a system administrator.



### 3 Enter the baseline forecast

Enter the Forecast units.

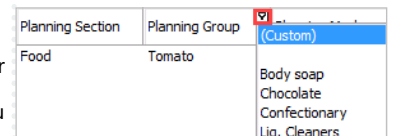
You can also fill in returns forecast the same way.

Pred. Baseline		0				0
Baseline	1.247.701	1.162.195	12.557.852	11.530.837	89.205	100.000
Promotions	107.644	535.681	798.932	3.266.672	0	78.500
Launches	13.393	1.436	115.043	11.457	0	13.000
Returns forecast, Units	0	0	0	0	0	0
Financial Forecast	0	0	0	0	0	0
Cannibalization	0	0	0	0	0	0
<b>Total Stream</b>	<b>1.368.738</b>	<b>1.699.312</b>	<b>13.471.828</b>	<b>14.808.966</b>	<b>89.205</b>	<b>191.500</b>

## Other options

### Filter and search

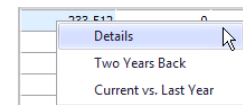
You can filter and search the planning hierarchy by clicking the filter icon in the relevant planning hierarchy. For example, click the filter icon in group and choose the group you want to see the baseline for.



### Show details

If you right-click one of the streams in the planning area, you can choose to see details. This shows a table with details about the different products included in the mask.

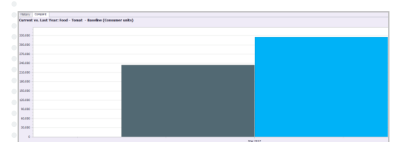
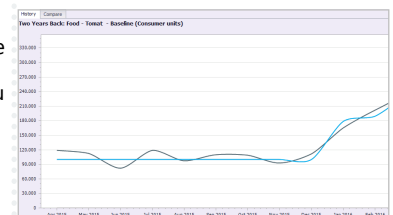
You can choose the same in the Planning ribbon.



### Show history or compare

You can also choose to click Two Years Back to see the history of the baseline over the two last years.

Or you can click Current vs. Last Year to compare how many units you sold last year with what you forecast to sell this year.



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.

## Quick guide for BMS

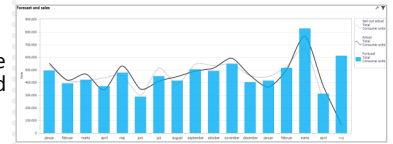


Check the Setup planning window to learn about how you setup the baseline.



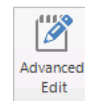
### Show forecast and actual sales

Click the name of the customer in the top of the menu to the left. Here you will see a graph showing the forecasted consumer units compared to the actual sales of consumer units.



### Advanced insert

Use Advanced insert to insert baseline for the selected product hierarchy. Click Advanced insert in the ribbon, mark the product hierarchy you want to enter the baseline for in the list to the left and then enter the period and/or mode. Check Apply flat amount to enter baseline. Enter the period you want to be displayed in baseline.



### Advanced edit

Use Advanced edit to change either year, quarter or month per-centage of the baseline. Click Advanced edit in the ribbon and select either year, quarter or month dependent on which period you want to change the baseline in. Enter the percent in the chosen field and click Apply and Close, if you are done editing.



### Allocation key override

The Forecast allocation split % in Details is an allocation key divided on all products in the baseline. You can select a specific product and override the allocation key for that product. Right-click in the baseline field and click Details and find the Forecast allocation split % header. Right-click in the field and click Override allocation split. Enter the percent in the pop-up window and click Ok.

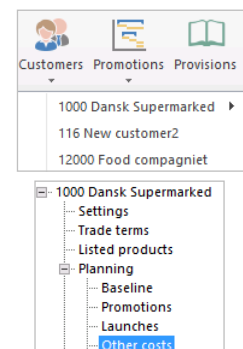
## Other costs

In Other costs you have an overview of costs to the customer that is not related to product units. Other costs is defined by financial values.



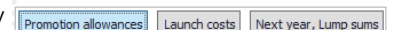
### 1 Open customer and find other costs

Find Customer in ribbon and choose the customer you want to work with. You can both choose top level customer and banner level customer. In the menu to the left, find Other costs under Planning.



### 2 Choose view

Choose the view you want to see. Promotion allowances opens by default.



### 3 Enter Fixed promo allowance, input

Enter the Fixed promo allow, input in Forecast value. This is the value you forecast to pay in promotion allowance.

Planning Mask	Stream	Jan 2017	
		Actual Y-1 Value	Forecast Value
	Fixed Promotion Allowance, Input	0	4,500.000
	Fixed Promotion Allowance, Promo	0	500.000
	<b>Fixed Promotion Allowance, Total</b>	<b>0</b>	<b>5,000.000</b>
Tomat	Fixed Promotion Allowance, Input	0	317.149
	Fixed Promotion Allowance, Promo	0	68.874
	<b>Fixed Promotion Allowance, Total</b>	<b>0</b>	<b>386.023</b>

### Sell out estimate

#### Sell out estimate

BMS contains a scenario called Baseline stream, which you can use for forecasting sell out. This functions the same way as baseline.

## Planning baseline

### Questions & Answers



*What if I want to plan the baseline per kg instead of consumer units?*

You can choose how to plan the baseline below the different views in the upper right corner of the tab. Click the drop-down list in plan on. Here you can choose between planning on consumer units, sales units and per kg.

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