

Setting up P&L

In BMS you can setup your P&L terminology, appearance, Calculation and display to tables and promotions.

Introduction

This Quick guide will show you how to setup your P&L. You have the ability to select what figures you want to be displayed at your P&L. In the end you have setup a P&L.

Quick guide concept

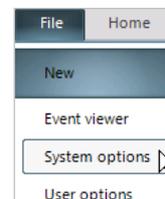
Through a number of easy steps you learn how to use the software.

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.

Setup P&L

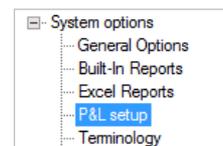
1 Go to System options

In the ribbon, click on File and find System options in the menu to the left and click on it.



2 Go to P&L setup

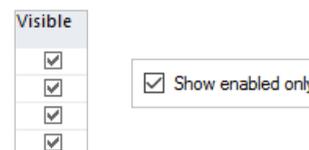
In the pop-up window, click on P&L setup in the menu to the left. The corresponding tab will open in the window.



3 Configure the P&L parameter's visibility

As default only the pre-marked visible parameters will be displayed, click to uncheck the Show enabled only to display all the existing parameters in P&L setup tab.

In the P&L window, you can put a check mark in the P&L parameters you want to be displayed in the P&L. Do this in the Visible column.



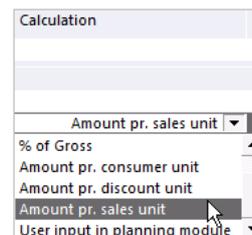
4 Edit parameter's names

Customize in the Custom text column the name of the parameters you want.

Name	Custom text
Search...	
Returns 1	Returns forecast
Invoice discount 1	Contract Discount %
Invoice discount 2	Other Discount %
Invoice discount 3	Logistic rebate %

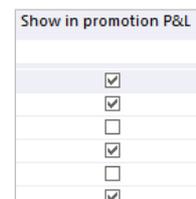
5 Define parameter's calculation

In some parameters it is possible to customize the calculation method in the Calculation column. Choose the way of calculation from the preconfigured by BMS drop-down list options.



6 Configure the promotion P&L visibility

As default all the parameters are marked as shown in promotion P&L. Check or uncheck the P&L parameters you want to appear in promotions. Do this in the Show in promotion P&L column.



7 Changes are saved automatically

When you have finished setup the P&L parameters, you just close the window without further action. The changes will be saved by default.



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.