

Quick guide for BMS

Introduction

This Quick guide will show you how to use Business alerts and how to optimize your risk management.

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.

On the last page it is described how to set up the Security and/or System options to activate, view and edit the described feature.



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.

Business alerts

In BMS, Business alert is a threshold system to help you keep track of the over/under forecasted sales in critical periods. Thus, Business alerts can help you with risk management and on-the-edge sales.

Business alerts is a tool built for the validity and reliability test of your pre & post sales activities. They are useful for controlling sales performance of business, sales management with limited availability of sales units, optimization of the reserved units management, time period specific minimum or maximum sales levels.

The Business alerts logic

Business alerts functions as a sales test-execution system. Every time a prediction (baseline, forecasts, actuals, etc.) number is edited, it runs the changes through restriction rules to test if there is a minimum or maximum limit for the specific edited fields. The setup of these threshold rules can be created based on a specific time period for individual products or group of products (product hierarchy dimensions).

As long as there is an active threshold, Business alerts will notify the user when a change of number in the system overrules the restriction.

Create a Business alert threshold

1 Open Business alerts

From the "Home" navigation ribbon click on "Business alerts" icon to open the corresponding tab.

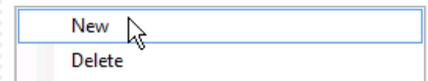


2 Add a Threshold alert

Click on **green plus** icon in upper right side of the tab to add a new alert line.
Or, create a new Business alert by right-clicking in the main window area and select "New".



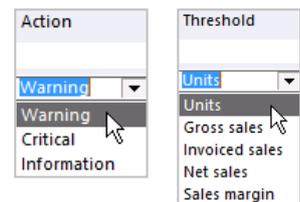
A line will be created in the main window with a unique "Alert ID".



3 Edit Values

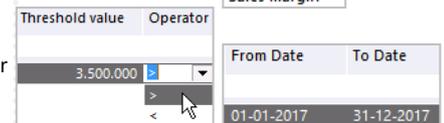
Define the following:

Action - is the result of the alert. Information will be displayed with green and will not give an important alert, Warning will be displayed with orange and will give a warning alert, and Critical will be displayed with red to indicate the high importance of the alert; additionally a message will be displayed for 10 seconds on the top of the screen to notify the user every time entering the application or when open Business alerts or when the alert is triggered.



Threshold - is value and metric elements.

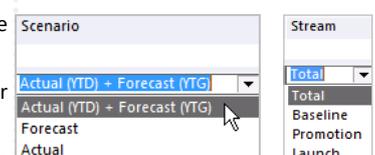
Threshold value - is the number you want to set as a max or min for this alert.



Operator - choose between "<" or ">" to specify the restriction.

From- & To- dates - define the dates that the alert will look for the data specified in this threshold.

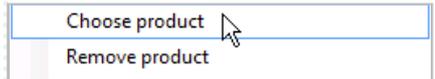
Scenario - is the type of data to be retrieved: Actual, Forecast or YTD+YTG (trend) data.



Stream - is the type of information source, from Baseline, Promotion Launch or total.

4 Match the alert on a specific product

You can connect the alert with an individual product by right-click on the alert line and select **“Choose product”**. Then from the opening product list find and select the product.



Match on product	
Product	Item no
1000 Shampoo Normal	1000

5 Match the alert on product group

You can connect the alert with a product group by selecting from the drop down list of the available hierarchy product group dimensions.

Match on hierarchy	
Brand Name	Product Type
23625 Excellent Clean	
24568 Excellent Essence	
22514 Excellent Food	
25661 Excellent Home	

6 Get current value

This is not a mandatory step as in this way you trigger the alert and it gets a state. But if you want to see the current value of what you selected you have to go through this step.



After defining all the details of the alert click on **blue play** button to get the data in the **“Current value”** field. This action will tell the system to collect the current data based on the set up of this alert.

When you are done, click on the reset **blue arrow** button to reset the state of the alert.



7 Define run period

In the area of **“Selected alert”** down left, set the from- to- dates in the **“Run period:”** to define when you want the system to run the checks for the specific alert.

Run period: 01-07-2017 to 31-07-2017

8 Activate the alert

In order for the alert to be in effect, it needs to be marked as Active. Mark the check-box under the **“Active”** column.



9 Exit Business alerts

When you are done adding and editing all the alert lines, close the tab. All the changes are simultaneously saved.

Maintaining Business alerts

1 Delete alerts

Select the alert line you want to delete and click on the **red X** button on the top right corner, or, right-click and select **“Delete”**. Verify your action in the pop-up window.



2 Check Business Alerts

You can run manually a check on an alert. Select an alert line and click on the **blue play** button to run a check. You can change selections to test it in a different way and see the results. After every check the alert will be displayed with the corresponding color of the result. You can also multiselect and check.



When you are done, click on the reset **blue arrow** button to reset the state of the alert if you do not want to have the alert triggered.



3 Reset Business Alerts

When you select to check an alert you overrule the alert's date setup and trigger the test. Reset function is used after the check of the alert in order to reset the "Current state". It is also used to reset any alert anytime. Select the alert line you want to reset and click on the **blue arrow** button. The system will reset the alert to the default state. You can also multiselect and reset.



4 Business alert list maintenance

You have a list of options to display the alert lines as you want. Click through "Active", "Raised", "Inactive" and "All". You can always click on the **blue refresh** button to refresh the data in the list if any changes are done.



5 Selected alert

You find the "Selected alert" field in the bottom of the tab. Here is some basic information about the alert.

Alert ID - A unique ID number representing the alert.

Active - Indicates whether the alert is active or not and can be checked or unchecked to change the state of the alert.

Run period - Displays the running period of the alert and can be edited by changing the dates.

Last check - Displays the date when the alert was last checked for both "Check now" testing, as well as, system's check.

Current state - Displays the text message of the alert if the alert is triggered.

Note - Field to keep notes about the alert.

Selected alert

Alert ID:

Active:

Run period: to

Last check:

Current state:

Note:

6 Data

In the bottom of the tab, the "Data" field is displayed. Here is displayed analytical data about the alert. This data is collected based on the setup of the alert line. Thus, "Threshold", "Scenario", "Stream", "From Date", "To Date", and, the product/group of products allocation, affect the information displayed in "Data". In other words, this displays the analysis of the "Current value" number.

For our example:

The Data analysis would be:

Values	Threshold	Threshold value	Operator	Current value	From Date	To Date	Scenario	Stream
Critical	Units	3,000,000	>	2,595,243	01-01-2017	31-12-2017	YTD + YTG	Total

Data

Drag a column header here to group by that column.

Customer name	Stream	Actual	Forecast	YTD + YTG
Carrefour	Baseline	618,235	118,000	736235
Carrefour	Promotion	81,190	46,000	127190
Lidl	Baseline	421,795	80,000	501795
Lidl	Promotion	38,094	12,000	50094
Tesco	Baseline	861,635	165,000	1026635
Tesco	Promotion	153,294	0	153294
		2,174,243	421,000	

Business alert visual notifications

In BMS, Business alerts have been designed to notify the user as fast as possible with the alert that has been triggered. Therefore, a visual notification setup has been designed for that reason.

1 Business alerts icon

The icon of Business alerts, traffic light, will display with red, orange and/or green color, when there are Critical, Warning and Information alerts. Also, the total number of the triggered alerts will be displayed alongside with the Business alerts' names. But the traffic light can only be green when there is no Critical or Warning alerts triggered.

Examples:

Only Critical alerts triggered.



Only Warning alerts triggered.



Both Critical and Warning alerts triggered.



Only Information or no alerts triggered.



No alerts in Business alerts or no active alerts.



2 Business alerts message

A message displays in the top line of the application window when an alert is triggered. The message will only be displayed once and the Business alert icon will change color.

If you do not change the triggered alert, the message will be displayed every time you log on the system.

The message will look like this:



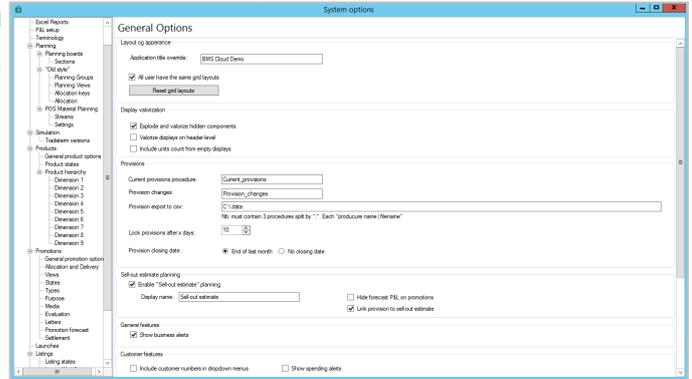
The same message will be displayed in "Current state" column and field.

System options - activate functionality

To be able for a user to work with the Business Alerts module, the functionality needs to be activated from the System options by a super-user/admin.

i System options

From "File" select "System options" and the window with all the system settings will open. Select "General Options" to open the corresponding settings.



i Activate Business Alerts

Under the section of "General features" mark the check-box "Show business alerts" to allow the users to be able to see and work with the Business Alerts module.

