

Listing overview

Quick guide for BMS

Introduction

Introduction

This Quick guide will show you how to Add and edit a listing overview in the dashboard or report. The data that needs to be filled in is; customers, products, and time. In the end you have setup a listing overview in dashboard.

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 to activate, view and edit the described tool.



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.

1 Add element

Open *My dashboard* in ribbon. A new tab opens. Click *Edit Layout* and choose *Add Element*. A window opens. Click *Listing overview*.

This functions the same way in My dashboard as in Shared dashboard and any report.



You should start experiment adding elements in *My dashboard*, and when you feel comfortable you can start setting up the *Shared dashboard*. In this way, the *Shared dashboard* will not be edited by several users.

2 Configure the Listing overview

The listing overview is set up with a product overview to the left and an overview of the customer(s) in the top. The products are checked at the customers they are sold to.

You can set up the listing overview for different customers, periods, brands etc. You can also select the value(s) you want for the different brands by customers.

This will be explained later in this guide.

3 Placing elements

When you have added elements you need to figure out where to place the element on the dashboard.

The first element you add will automatically fill the working area.

The second will appear in a pop-up window next to the cursor on the screen.

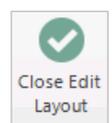
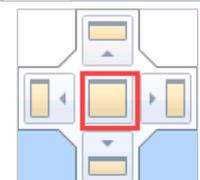
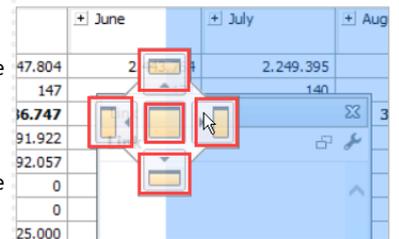
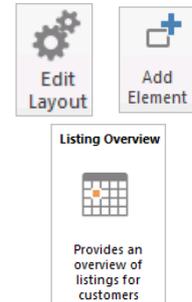
Click the element to move it. A docking assistant appears on the screen where you can dock the element in the appropriate position. Drag the element to one of the five docking areas (highlighted in red) to dock the window in the middle of the screen. Each docking area indicates the position of the element after it has been docked. The area in blue indicates where the element will be docked.

If you place the element in the middle docking area of an existing element (second picture), the window will be placed in another tab than the first one. This creates different tabs in the bottom of the first tab (third picture).

The docking area in the outer edges (fourth picture) of the tab places the element in the outer edges. If you place the element in the bottom of the tab, and then remove the first element, the second element will remain in the bottom of the tab.

4 Save layout

Click *Close Edit Layout* in the ribbon to save your new layout.



Configuration

Above you see the window that appears when you add a Listing overview. Here is a description of the different marked points.

1. Here you select the top level customer you want the listing to show. BMS will automatically display the banner level customers belonging to the top level customers.
2. Select the period you want the listing to be displayed in.
3. Here you select the Brand(s), Product states and Listing states you want to display in the table.
4. Select if you want the overview on SKU, Display or both.
5. Here you can check the value(s) you want to be displayed for every product belonging to the customer. If you do not check any values, BMS will make a cross in the fields instead.

Setup Listing overview

Products						Carrefour		
Brand Name	Dimension 2	Item Number	Product	EAN consumer unit	EAN sales unit	Carrefour	Carrefour Market	Carrefour Express
Excellent Home		8000	Flower-pot Ø22cm	7895364125364	8895364125364	X		
Excellent Home		8001	Stool-Wooden Oak 52cm	7895364125365	8895364125365	X	X	X
Excellent Food		7006	Chocolate Sticks Cherry 250g	2536148971548	3536148971548	X	X	X
Excellent Essence		1000	Shampoo Normal	5123657895423	6123657895423	X		
Excellent Essence		1001	Shampoo Colored	5123657895424	6123657895424	X	X	X
Excellent Essence		1002	Shampoo Shiny	5123657895425	6123657895425	X	X	X
Excellent Essence		1003	Shampoo Dry	5123657895426	6123657895426	X	X	X
Excellent Food		2000	TOMATO Ketchup 500 ml	5123657895430	6123657895430	X	X	X
Excellent Food		2001	TOMATO Ketchup 750 ml	5123657895433	6123657895433	X	X	X
Excellent Clean		3000	LIQUID Cleaner Floor 750 ml	5123657895444	6123657895444	X	X	X
Excellent Clean		3001	LIQUID Cleaner Kitchen 750ml	5123657895445	6123657895445	X	X	X
Excellent Clean		3002	LIQUID Cleaner WC 750 ml	5123657895446	6123657895446	X	X	X
Excellent Essence		4000	Shower Gel Normal	5123657895453	6123657895453	X	X	X
Excellent Essence		4001	Shower Gel Baby Skin	5123657895454	6123657895454	X	X	X
Excellent Essence		5000	Toothpaste Shiny White	5123657895455	6123657895455	X	X	X
Excellent Essence		4002	Shower Gel for Men	5123657895456	6123657895456	X	X	X
Excellent Essence		5001	Toothpaste Sensitive	5123657895457	6123657895457	X	X	X
Excellent Essence		6000	Body-lotion Rose	5123657895460	6123657895460			
Excellent Essence		6001	Body-lotion Vanilla	5123657895461	6123657895461			
Excellent Clean		3003	LIQUID Cleaner Fabric 1000ml	5123657895484	6123657895484	X	X	X
Excellent Food		7000	Chocolate Sticks 250g	51234567895508		X	X	X
Excellent Food		7002	Chocolate Sticks Strawberry 250g	51234567895509		X	X	X
Excellent Food		7004	Chocolate Sticks Mix 250g	51234567895510		X	X	X
Excellent Essence		6002	Body-lotion Neutral PH	51234567895511				
Excellent Home		8002	Photo-frame Silver	51234567895512	61234567895512			
Excellent Food		7001	Chocolate Sticks 500g	51234567895513		X	X	X

1 Select top level customer(s)

Select the top level customer you want in your *Listing overview*. (Configure number 1).

Top level customer: 1

2 Select period

Select the period you want your overview to be displayed in. You can either select a from and to date, a specific date or select current. (Configure number 2).

From date between and 2
 To date between and
 Valid on Current

3 Select products

Here you check the brands in the drop-down list you want to be displayed in the left columns of the overview table. You can also check the product states and listing states. (Configure number 3).

Brand Name: 3
 Product states:
 Listing states:
 Show products without listings

4 Select type

In *Type*, check the type you want to be displayed. (Configure number 4).

Type: SKU Display Both 4

Check values

You can choose to check values to the overview table instead of the 'X's. You can check more values if you want. (Configure number 5).

Values 5

- 'X' for listed
- Customer item number
- Listing state code
- Listing state name
- Retail Sale
- Chain price
- Gross Price
- Invoiced sales
- Net Price
- From and to dates

Decimals:

Security - User Roles

For a user to view and edit the Reports in the system, access needs to be granted from Security settings by a super-user/admin.

Security

From "File" select "Security" and the window with all the users in the system and the roles assigned to each one will open. Select a role to open the corresponding settings.



Allow View & Edit Reports

Check mark the boxes to allow the role to view and edit:

Standard reports - mark **“System”** to allow to work with standard BMS reports.

Company reports - mark **“Access report folder”** to allow access to the corresponding folder with company specific reports.

User reports - mark **“Allow user reports”** to allow the role to build his/her private reports.

Edit dashboard - mark **“Frontpage”, “User dashboards”** and **“Company dashboards”** to allow access to the corresponding dashboards.

Report Packs - mark **“Manage Report Packs”** and **“ Access Reports Packs”** to allow view and edit of the report packs.

Company dashboards - mark the **“Report folder X”** to allow access to the corresponding report folders.

Standard reports	
<input checked="" type="checkbox"/> System	
Company reports	
<input checked="" type="checkbox"/> Access report folder	
User reports	
<input checked="" type="checkbox"/> Allow user reports	
Edit dashboards	
<input checked="" type="checkbox"/> Frontpage	<input checked="" type="checkbox"/> User dashboards
<input checked="" type="checkbox"/> Company dashboards	
Reports Packs	
<input checked="" type="checkbox"/> Manage Report Packs	<input checked="" type="checkbox"/> Access Report Packs
Company dashboards	
<input checked="" type="checkbox"/> Report folder 1	<input checked="" type="checkbox"/> Report folder 2
<input checked="" type="checkbox"/> Report folder 3	<input checked="" type="checkbox"/> Report folder 4
<input checked="" type="checkbox"/> Report folder 5	<input type="checkbox"/> Report folder 6