

# Creating customers

## Introduction

This Quick guide will show you how to create a new customer. The data that needs to be filled in is; customer name, number, customer type, settlement, calculation method and delivery profile. In the end you have a new customer in BMS.

## 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 new customer

Select File/New in upper left corner and click on Customer icon. A new customer window opens up automatically (New customer/Settings/Basic Data).



### 2 Name the customer

Enter Customer name and Customer number (identical to number in ERP system).

### 3 Define customer hierarchy

Enter Customer type:  
 Top level customer = Wholesaler  
 Banner = A chain below a wholesaler.  
 If banner is selected, select the top level customer in the drop-down list.  
 Check Use trade term from top level, if no specific trade terms are valid for the banner.  
 Other settings are company specific.

### 4 Define promotion settings

Settlement: Select Sell in, if variable promotion allowances are based on sell in. Alternatively, select Sell out.

Define default start and end in-store dates for promotions for the specific customer by using the arrows.

If you are using:

- 1) Variable promo allowance on invoice: Define default calculation method in drop down (here "% of Gross" is defined) and enable if discount can be given as % or amount.
- 2) Variable off invoice %-promotion allowance: Define default calculation method in drop down (here "% of Invoice" is defined) and enable discount as %.
- 3) Variable off invoice €-promotion allowance (fixed amount/unit): Define default calculation method in drop down (here "Amount" is defined) and enable discount as amount.
- 4) Default Fixed allowances – here defined as Off invoice.

*Tip: You can enable other options if they are used for this customer.*

### 5 Set default promotion delivery template

Forecast for every promotion will be allocated to a delivery week. Promotion in store week is week 0, and -1 is the week before. -2 is 2 weeks before. In the example, default delivery is set to 80% 2 weeks before and 20% 1 week before for SKU. For display default delivery is 100% 2 weeks before. Need for more weeks: Right click in table and select Add to first or Add to last.

Delivey profile template for new promotions:

Week	SKU	Display
-2	0	0
-1	100	100

### 6 Define customer rules

Here can be set the allocation rules, recalculation rules and visibility of planning boards.

**Allocation rule for Baseline planning** - select based on the input customer level, where should the system allocate the baseline, to top level or banner.

**Allocation rule for Other Costs planning** - select based on the input customer level, where should the system allocate the other costs data, to top level, banner or both.

**Recalculation rule for Baseline** - select how often you want the system to execute recalculation of the Baseline, weekly or monthly.

**Recalculation rule for Other costs** - select how often you want the system to execute recalculation of the Other Costs, weekly or monthly.

**Recalculation rule for Budget** - select how often you want the system to execute recalculation of the Budget, weekly or monthly.

**Predicted Baseline calculation options** - select a calculation option for the predicted baseline model. Choose from which period of time and how you want the system to calculate it.

When make changes in predicted baseline, to apply them click on the "Update now" button. Here it is visible when was the last update as well.

**Planning Boards** - check the box if this customer should be visible in the customer menu selection of Planning boards.

Delivey profile template for new promotions:

Week	SKU	Display
-2	0	0
-1	100	100

- Add to first
- Remove from first
- Add to last
- Remove from last

Allocation rule for Baseline planning

- Input on top level, no allocation to banners, no input on banners
- Input on banner level, no input on top
- Input on top level, allocation to banners, no input on banners

Allocation rule for Other Costs planning

- Input on top level, no allocation to banners, no input on banners
- Input on banner level, no input on top
- Input on top level, allocation to banners, no input on banners

Recalculation rule for Baseline

- Week
- Month

Recalculation rule for Other Costs

- Week
- Month

Recalculation rule for Budget

- Week
- Month

Predicted Baseline calculation options

- Do not calculate predicted baseline
- 12 month past actual baseline, season from last calendar year
- Last year total actuals minus settled promotions
- Sell-in: Weighted average from periods without promotions, 12 months back
- Sell-out: Weighted average from periods without promotions, 12 months back

Last update: 24-07-2018 11:26 Update now

Planning Boards

- Visible in menus

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### Questions & Answers



*How do I add a week to the delivery profile?*

Go to Settings, and under Promotion Settings, you find the Delivery profile template for new promotions. Right-click within the area and choose Add to first. You can also remove a week by clicking Remove from first instead.



*Where do I maintain the customer's item number?*

Go to listings and find the Customer item number in the menu of the listing.