

Uploading and importing on cloud

Introduction

This Quick guide will give you an overview of how to upload files to BMS cloud and then import these files in the application.

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.

Uploading files in BMS is a mandatory step before importing files to the application. In BMS it is a time-saving process to update your applications' data.

In order to have a ready template fitting with the system, you can create sample data in the system, export it as an Excel file and then use this template file to match your data of your existing file templates. Use this new template to upload your files.

All the files you upload to the system will be stored for seven days until the system automatically deletes them. This is to help you storing only the latest uploads and it keeps the system clean.

In BMS the import option is being used in:

- Product lists
- Listings
- Launches
- Promotion lists
- Product price lists
- Trade terms
- Actual Sales
- Other Costs

How to upload files

1 Open the basic-function bar

Go to the top in the middle of BMS browser window and click on the grey arrow to show the basic-functions bar for the application.



2 Open the upload window

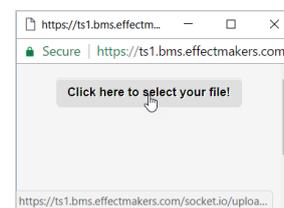
Click on the icon From PC to server. A new window pops up on the screen.



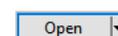
3 Select and open your files

Click on Click here to select your file and now you are ready to select and upload files into the system.

Find and select the files you want and click on Open. The files will be uploaded and saved automatically.



Name	Date modified
BMS Starter - Listings	1/6/2017 3:37 PM
BMS Starter - Products Cost Prices	2/10/2017 10:50 AM



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.



If you have problems with this process try to use a different browser.



If you have not completed these first three steps, when you try to import, the system will give you a warning message that you have not uploaded any files.

When you have completed the uploading of the files you want to import to the system, you are ready to start the import process in BMS.

Importing files in BMS cloud

Importing files in BMS is an option that offers a fast way to inform your systems' database.

A mandatory step before importing files to the application is to upload the files from your local PC to the cloud server.

In order to have a ready template fitting with the system, you can create sample data in the system, export it as an Excel file and then use this template file to match your data of your existing file templates. Use this new template to upload your files.

All the files you upload to the system will be stored for seven days until the system automatically deletes them. This is to help you storing the latest uploads only and to keep the system clean.

How to Import files: Example illustration of Product list

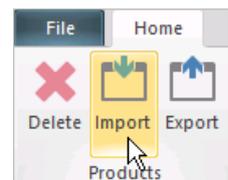
1 Go to Product List

Go to *Home* ribbon and click on *Product list*.



2 Open the Import window

The product list tab opens. Click on the Import icon to open the import products tab.



3 Open the drop-down list of uploaded files

In the Choose file field you can select from the drop-down list the file you want to import. In this drop-down list all your files you have uploaded previously from the PC to the server are listed.



4 Click on the file you want

Select the file you want to import. You can only select one file at a time. The file is automatically loaded in the window.

5 Customize the imported data

In the Source file template you find the Options field with some options of how you can customize the file you want to import. Below Options, you have the Preview field, where you can see all changes you make in Options.



Preview

Drag a column header here to group by that column.

Row	Item number	Product name	Units pr. package	EAN consumer...
2	1047	FABRIC Cashme...	12	5123657895470
3	1049	FABRIC Classic ...	12	5123657895472

6 Make the field mapping

Go to Fields mapping template in the import products tab, to configure and match the Source field names with the Destination field names. You can do it simply by clicking in the field in Destination field column next to the name of the Source field column that you want to change and choose the new name from the drop-down list. You can load if your already saved mappings are in the system by clicking on the Load mappings button and find, choose and open the file in the new window that appears with the name Open.

Field mapping

Source field	Destination field
Item number	Item number
Product name	Item number 2
Units pr. package	Item number 3
EAN consumer unit	Product name
Brand name	Units pr. package
Product State	Display
	Hide
	Discount unit



The option Automatically create missing dimensions is used to create your dimensions' names in the system. But, next time you import you have to not make spelling mistakes because you will create data that are incorrectly informed.

Quick guide for BMS



In Field mapping you cannot let the fields be empty. Fill in with zero (0) if needed.



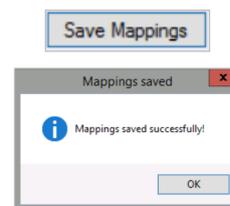
If Errors or Warnings appear in this field, you will not be able to complete importing. They are arranged in order to prevent you from importing wrong data. This means that you have to work carefully with the mappings, so you can be accurate with the data you import in BMS.



The button Import will only be active in the Import template.

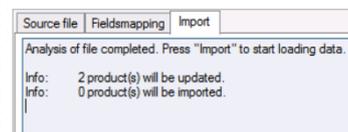
7 Save the Mapping

When you have completed the changes you have the option to save your mappings. To do this, click on Save mappings and a new window will appear on the screen with the name Save as. Save the file in a folder you want and give it a name. When you are done, click Save. A confirmation window named Mappings saved will appear requesting for your approval to continue.



8 Analyze the file for errors

In the window Import products you can go to the template Import in order to see the Analysis of file. In this field you can see the results of the import and if there are any errors in the data.



9 Import the file

As soon as you are done with the changes, you can click on the Import button and your products will be imported into BMS. Now, you can find them in the Product list.



Download files to your local computer

The following describes the next steps after Exporting a file from BMS. When exporting a file from BMS, for safety and easier use of the system, the file is saved on the server. Thus, later on you need to follow the next steps if you want the file on your local computer.

1 Open the basic-functions bar

Go to the top in the middle of BMS browser window and click on the grey arrow to show the basic-functions bar for the application.



2 Open the download window

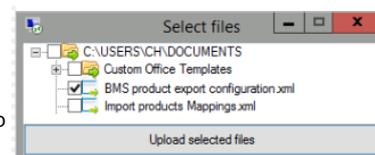
Click on the icon From server to PC. A new window pops up on the screen.



3 Select files to download

Put a checkmark in the boxes of the files, you want to download.

When you have done this, click on the Upload selected files button to start downloading the files.

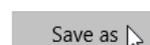


4 Save the files

When the files are downloaded, you will be able to find them in your computer. This step depends on which browser you use. In this example, we use Microsoft Edge.

Click Save as on the button, and a pop up window appears.

Find the folder on your PC, you want to save in, and click Save.



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Questions & Answers



How can I export my sample data template in order to use it as a guide-template?

The Export button is always placed next to Import. When you have finished creating your sample data press it to export a file to your local PC.



What will happen if I import the same data twice?

Nothing will happen. You will just update the already existing data with the imported data.



I uploaded all of my products, but instead of having a specific brand segmentation I have several similar brands?

You should check for spelling mistakes in the files you upload, which may exist in your brand segments. Correct these mistakes to let the system identify and use the correct product hierarchy.