

**Oracle® Retail Promotion Planning and  
Optimization**

User Guide

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Primary Author: Daniel Milton

Contributing Author:

Contributor: Janet Lee, Shruti Mathur, Stephanie Perreault

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## Glossary

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# Preface

Oracle Retail Promotion Planning and Optimization is a complete guide to the use of Promotion Planning and Optimization.

## Audience

This document is intended for the users and administrators of Oracle Retail Promotion Planning and Optimization.

## Related Documents

For more information, see the following documents in the Oracle Retail Promotion Intelligence and Promotion Planning and Optimization documentation set:

- *Oracle Retail Promotion Intelligence and Promotion Planning and Optimization 12.0.2 Release Notes*
- *Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Installation Guide*
- *Oracle Retail Promotion Intelligence User Guide*
- *Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Operations Guide*
- *Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Configuration Guide*
- *Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Sample Data Set Guide*

## Customer Support

- <https://metalink.oracle.com>

When contacting Customer Support, please provide:

- Product version and program/module name
- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to recreate
- Exact error message received
- Screen shots of each step you take

## Conventions

The following text conventions are used in this document:

Convention	Meaning
<b>boldface</b>	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
<code>monospace</code>	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

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# Getting Started

Welcome to Oracle Retail Promotion Planning and Optimization assists you in creating and improving your promotions. It allows you to leverage information gained from Promotion Intelligence to make the best promotion decisions by using what-if analysis and predictive forecasting.

This chapter helps you understand Promotion Planning and Optimization and how to access the application. It contains the following sections:

- About Oracle Retail Promotion Planning and Optimization
- Logging on to Promotion Planning and Optimization

## About Oracle Retail Promotion Planning and Optimization

Marketers and Merchants use the same environment to execute their strategies. They can plan event calendars, allocate white space across merchandise categories, and select items to feature.

Promotion Planning and Optimization combines analysis, planning, and implementation components to give retailers the capability to achieve the highest return on their advertising, promotion, and inventory investments.

## Features

Promotion Planning and Optimization is designed to be your one source for planning, implementing, and simulating promotions. Its features include:

- Promotion calendar
- Promotion event planning
- Promotion performance forecasting
- Vendor deal definition
- What-If
- Configurable workflow
- Page, vehicle, and promotion templates
- Store sets

## Users

Your organization may have one or many people involved in the creation, management, and analysis of promotions. Promotion Planning and Optimization users include:

- Merchant teams
- Executives/managers
- Ad planners
- Buyers
- Category/merchandise managers
- Planners/allocators
- Analysts

## Tasks

Promotion Planning and Optimization assists in:

- Promotion event planning
- Offer planning
- Vehicle design
- Vendor deal definition
- Forecasting promotion performance

## Logging on to Promotion Planning and Optimization

To access Promotion Planning and Optimization

1. Start Internet Explorer.
2. Enter the Promotion Planning and Optimization URL for your company in the Address field.
3. Press Enter. The Login window opens.

**Figure 1–1 Login Window**



ORACLE<sup>®</sup>

RETAIL

Username:

Password:

Login

4. Enter your username in the Username field.
5. Enter your password in the Password field.



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**Note:** Your username and password are case sensitive. If you are unable to log in check you keyboard to make sure Caps Lock is off. If you forget your username or password, contact your system administrator.

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6. Click **Login**. The Promotion Planning and Optimization window opens to the Main Window with the Promotion Manager calendar.



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## Navigation/Setup

Promotion Planning and Optimization provides tools to help you plan and create promotions, and move around the application. Use this chapter to learn how to use each tool. Subsequent chapters will tell you when and where to use each tool.

---

**Note:** The tasks described in this chapter may not be available depending on the user role assigned to you. You may not see buttons or fields if they are not necessary for the type of tasks that you will complete.

---

### Calendar

The calendar is your starting point in Promotion Planning and Optimization. It allows you to view all the promotions and events for the week, month, quarter or year, or highlight specific types of events.

Use the calendar to plan high-level promotions far in advance, and define details for:

- Promotions
- Campaigns
- Company events
- Competitor events
- Personal events

### Calendar Toolbar

#### Toolbar Controls

Use the controls on the toolbar to navigate through the calendar.

**Figure 2-1** *Calendar Toolbar*



To create a new calendar entry

1. Click **New**.

## 2. Select the type of entry to create:

- Campaign
- Event
- Promotion

---

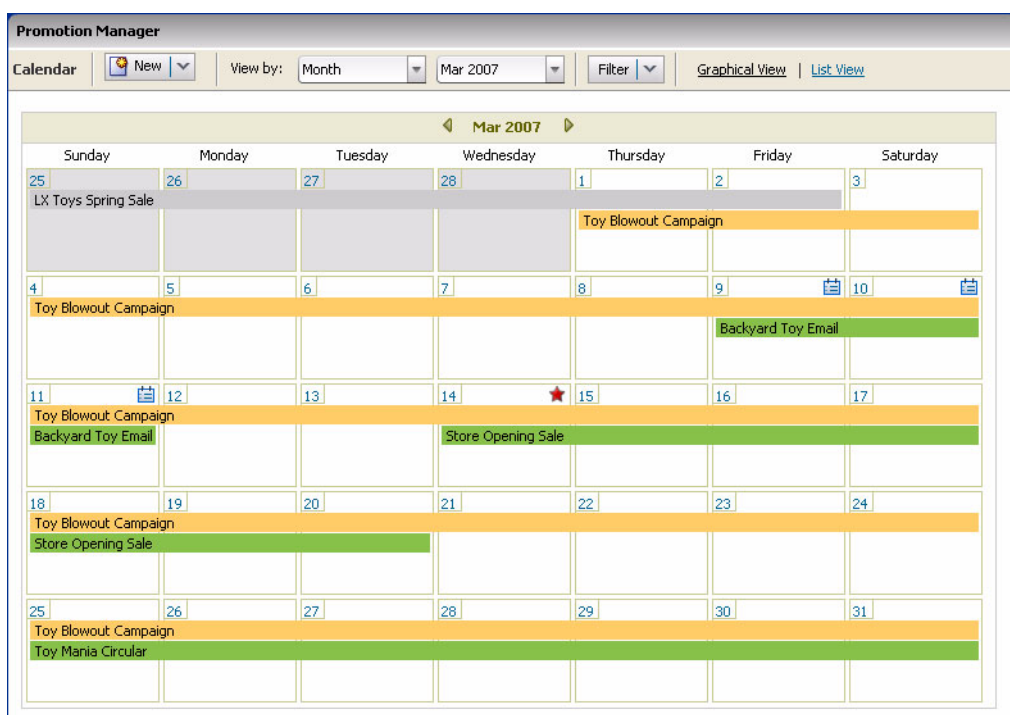
**Note:** See the chapters on Campaigns and Events and Promotions for complete creation information.

---

To view the calendar in a different way

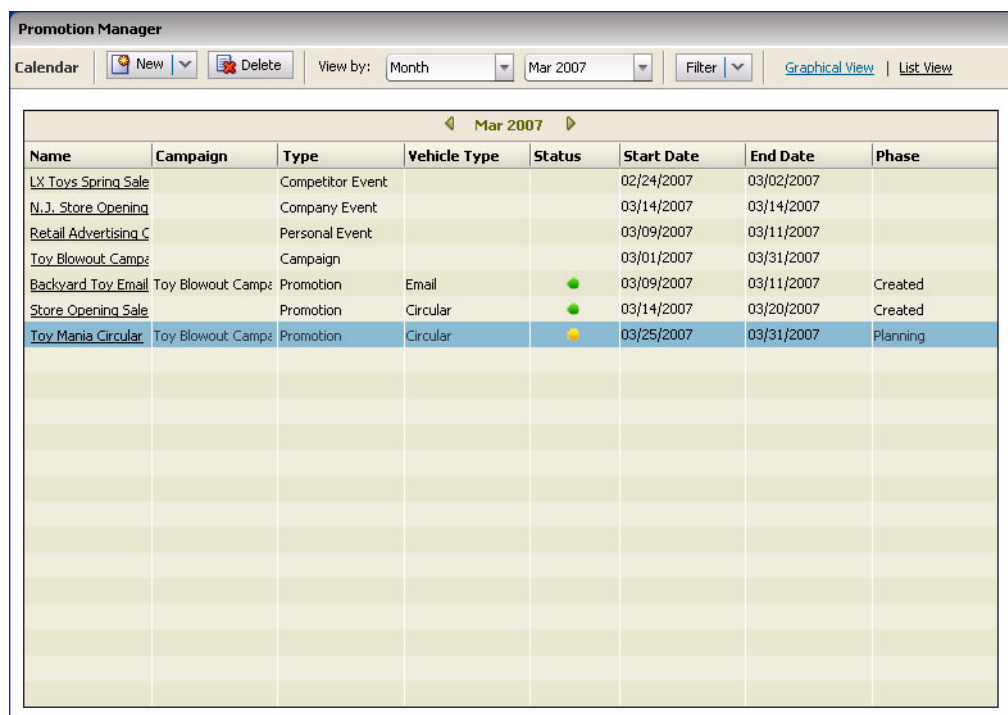
- Click the appropriate link to view events in:
  - Graphical View

**Figure 2–2 Calendar Graphical View**



- List View

**Figure 2–3** *Calendar List View*



- Click the right and left arrows to view the next or previous month.

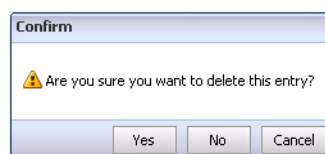
**Figure 2-4** *Next/Previous Month Arrows*



### To delete an event from the list view

1. Select the row for the event to remove.
2. Click **Delete**. The Confirm window opens.

**Figure 2–5 Confirm Delete Window**



- 3.** Click **Yes** to delete the event.

To delete an event from the graphical view

1. Select the event to delete. The Event Details window opens.
2. Click **Delete**. The confirm window opens.
3. Click **Yes** to delete the event.

To view entries by a different time period

1. Click **View by**.
2. Select the time period to view events by:
  - Week
    - Select the week to view events by.
  - Month
    - Select the month to view events by.
  - Quarter
    - Select the quarter to view events by.
  - Year
    - Select the year to view events by.

To view certain types of events only

1. Click Filter.
2. Select the type of event to view:
  - Campaign
  - Promotion
  - Company Event
  - Personal Event
  - Competitor Event

## Merchandise Selector

The Merchandise Selector provides a view of the merchandise hierarchy. Use it to view and select merchandise levels, to view assigned categories, or to view or select pre-defined offers to add to a promotion.

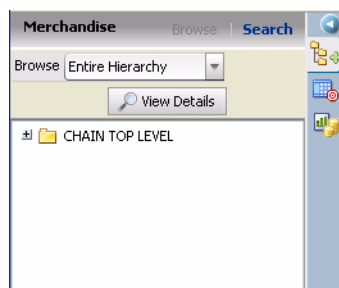
To use the Merchandise Selector

1. Open a promotion. The Merchandise Selector appears to the left of the promotion details window in Promotion Manager.

**Figure 2–6** *Minimized Merchandise Selector*



2. Click the arrow at the top of the Merchandise Selector to expand it.

**Figure 2–7 Expanded Merchandise Selector**

3. Use the merchandise selector for the following tasks.
  - Select an option from the Browse field to change what appears in the Merchandise Selector.
    - Entire Hierarchy - show all categories and items in the hierarchy.
    - Assigned Categories - show only those categories that are assigned to the promotion.
    - Offers - show the offers defined for this promotion.
  - Navigate the displayed hierarchy by expanding each level.
  - View the details of a level.
    - Select the level.
    - Click **View Details**. The Details window opens.

**Figure 2–8 Details Window**


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**Note:** The Details window displays different information depending on the merchandise level selected. In the case of the lowest level, such as SKU, the Merchandise Details window is where you assign like items, which are discussed later in this chapter.

---

- Drag category folders to the Category, Vehicle Design, Offer Details or Vendor Deal windows
- Drag items to the Offers Details, or Vendor Deal windows.
- Drag offers to the Vehicle Design window.

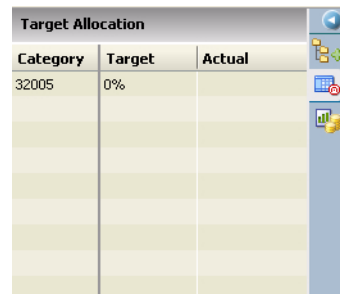
## Target Allocation

Use Target Allocation to view the target and actual space allocation for categories on a promotion.

To view target versus actual space allocation

1. Open a promotion. The Merchandise Selector appears to the left of the promotion details window in Promotion Manager.
2. Click the Target Allocation button. The Target Allocation window opens.

**Figure 2–9 Target Allocation Window**



Target Allocation		
Category	Target	Actual
32005	0%	

---

**Note:** Hold the cursor over a category ID to view the category name. Select a category while on the vehicle designer window to highlight the category in red on the thumbnail and layout views.

---

## Promotion Performance

Use Promotion Performance to view performance metric values, and to forecast and graph the predicted performance of a promotion.

To view promotion performance information

1. Open a promotion. The Merchandise Selector appears to the left of the promotion details window in Promotion Manager.
2. Click the Promotion Performance button. The Promotion Performance window opens.



**Figure 2–10 Promotion Performance Window**

Promotion Performance	
<div>Graph</div> <div>Forecast</div>	
Metric	Value
Status	Partial
ROI	20.34%
Lift	352%
Base Units	459
Incr Units	1,619
Tot Units	2,078
Base Sales	\$19,531.50
Incr Sales	\$64,937.80
Tot Sales	\$84,469.30
Base Margin	\$9,765.75
Incr Margin	\$30,503.55
Tot Margin	\$40,269.30
Aff Base Units	6,568
Aff Incr Units	-917
Aff Tot Units	5,651
Aff Base Sales	\$209,502.83
Aff Incr Sales	-\$40,105.34
Aff Tot Sales	\$169,397.49
Aff Base Margin	\$104,751.42
Aff Incr Margin	-\$20,052.67
Aff Tot Margin	\$84,698.74
Tot Incr Sales	\$24,832.46
Tot Incr Margin	\$10,450.88

### Forecast

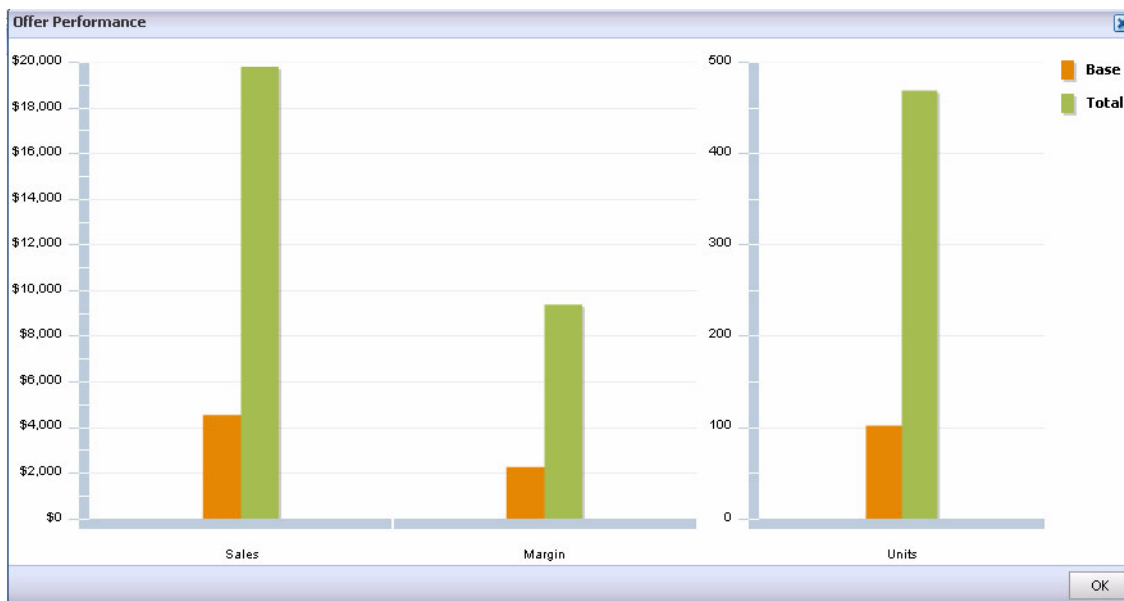
To update the performance metrics for a promotion

- Click Forecast. The metrics are updated.

### Graph

To graph the performance of a promotion

- Click Graph. The Promotion Performance window opens with the predicted performance of the promotion appearing on graphs.

**Figure 2–11 Promotion Performance Window**

## Navigator

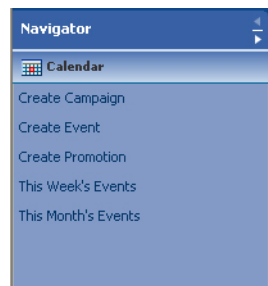
The Navigator appears on the left side of the Promotion Planning and Optimization window. It contains these navigation sections:

- Calendar
- To Do
- Setup
- Documents
- Reports

The tasks available from the various sections vary from user to user based on what permissions are assigned to them.

## Calendar

The Calendar section lists calendar related functions available to you. Use it to get back to the calendar from anywhere in Promotion Planning and Optimization.

**Figure 2–12 Navigator Calendar Section**

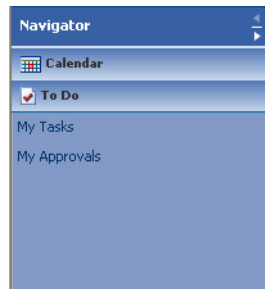
- Use the Create links to jump right to event creation.
- Use the links to events to view the current week or month's events.

## To Do

The To Do section lists all the uncompleted tasks and approvals assigned to you. Use it to navigate directly to your current work. You can start and complete tasks, and approve or deny tasks from the My Tasks and My Approvals windows.

See the Workflow section of the Promotions chapter for complete information on starting, completing, approving, and denying tasks.

**Figure 2–13** *Navigator To Do Section*



## My Tasks

Use the My Tasks window to view your assigned tasks, navigate to them, and to change the status of the tasks on the workflow (start and complete).

To work on your tasks

1. Click **My Tasks**. The My Tasks window opens in Promotion Manager.

**Figure 2–14** *My Tasks Window*

[illegible]

2. Select a task to work on by clicking the link in the Promotion column. The appropriate promotion document opens in Promotion Manager with the Workflow window open.

## To start a task

1. Click **Start** to begin a selected task. The My Task Status Window opens.

**Figure 2–15** *My Task Status Window*

My Task Status

dates 2

Phase

Created

Name

Task 1

Description

Complete Task 1

Priority

Low

Actual Date

Start

09/12/2006

End

☐ Complete

Note

OK

Cancel

2. Enter the date you began the task in the Actual Date - Start field, or leave it as the current date if you started today.

- To complete a task

- ## My Approvals

To view your approvals

- Figure 2-16** *My Approvals Window*

2. Select an approval to make by clicking on the link in the Promotion column. The appropriate promotion document is opened with the Workflow window open.

1. Click **Approve** to accept a selected approval. The My Task Approval window opens.

**Figure 2–17 My Task Approval Window**

The 'My Task Approval' window displays the following information:

- dates 2**
- Phase**: Created
- Name**: Task 1
- Description**: Complete Task 1
- Priority**: Low
- Approval Options**:
  - ☒ Approve
  - ☐ Deny
- Note**: A text input field for additional comments.
- Buttons**: OK and Cancel.

2. Select **Approve**.
3. Enter descriptive information about the approval in the Note field.
4. Click **OK**.
5. The status of the task changes to Complete with the current date appearing in the Start and End fields if you are the only approver of the task, or if all other approvers have approved the task.

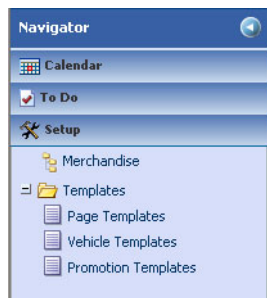
To deny an approval

1. Click **Deny** to disapprove of an approval. The My Task Approval window opens.
2. Select **Deny**.
3. Enter descriptive information about the denial in the Note field.
4. Click **OK**. The Task Details window will display a status of Denied in the Assignments section.

## Setup

The Setup section lets you manage merchandise, view and edit the available templates, and create new templates.

See the Templates chapter of this guide for definitions of the types of templates and complete information on creating and editing templates.

**Figure 2–18 Navigator Setup Section**

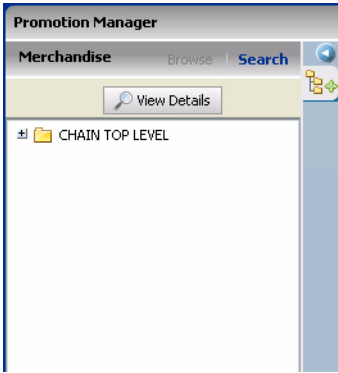
### Manage Merchandise

You can also manage merchandise from within a promotion using the merchandise selector, and the view details button.

To find merchandise to manage

1. Click Merchandise from the Setup section of Navigator. The Merchandise selector opens.

**Figure 2-19 Merchandise Selector Browse view**



2. Navigate to the item you want to manage through hierarchy by expanding each level of folder.  
OR  
Search for item.
  - a. Click **Search**. The Merchandise finder changes to search view.

**Figure 2-20 Merchandise Selector Search View**



- b. Enter criteria in the fields to narrow the search. Enter part or all of an Item ID or Name. Select a merchandise hierarchy level from the Level field.
- c. Click **Search**. Items that match the search criteria appear in the list.

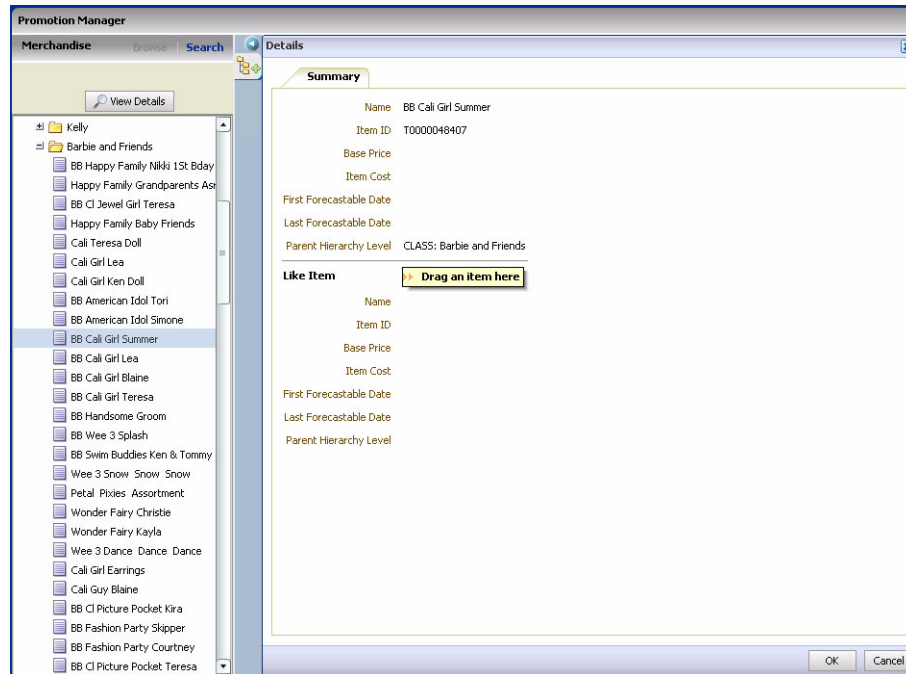
---

**Note:** An alert may appear if you don't enter enough information in the search criteria fields. Click OK, and enter more criteria.

---

3. Select the item.
4. Click **View Details**. The Details window opens.

**Figure 2–21 Merchandise Details Window**



**Like Items** Promotion Planning and Optimization lets you define like items for items that may not have enough history to produce accurate baseline predictions. You can also set up like items during promotion creation.

To create a like item association

1. Select the item that needs a like item.
2. Click **View Details**. The Details window opens.
3. Navigate to the item you want to associate the selected item with using the merchandise selector.
4. Drag the like item to “Drag an item here” on the Details window. The item’s details appear in the Like Items area of the Details window.
5. Click **OK**.

To remove a like item association

1. Select the item you want to disassociate with a like item using the merchandise selector.
2. Click **View Details**. The Details window opens.
3. Click the Delete button in the Like Item area. The Like Item is removed.
4. Click **OK**.



## Documents

The Documents section lists the promotion documents you currently have open. You can expand each promotion to the individual pages of the vehicle, and navigate directly to a page. Use the Documents section to switch between open documents.

To return to an open document

**Figure 2–22 Navigator Documents Section**



- Select a document or page to go directly to the Vehicle Design window for the page.

## Reports

The reports section lists the reports configured for access through Promotion Planning and Optimization.

See the Oracle Retail Promotion Intelligence User Guide for complete information on reports.

**Figure 2–23 Navigator Documents Section**





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## Templates

Templates make the day-to-day planning and creation of promotions easier by standardizing the promotion documents.

There are three types of templates in Promotion Planning and Optimization:

- Page templates
- Vehicle templates
- Promotion templates

### Page Templates

Page templates allow you to create and use standard layouts for positioning items and categories on pages. A page is a location within a vehicle (the media used to communicate promotions) where an item or items are promoted. The location may be physical, such as the first page of a circular, or virtual, such as a clip in a radio add or the front of an in-store display.

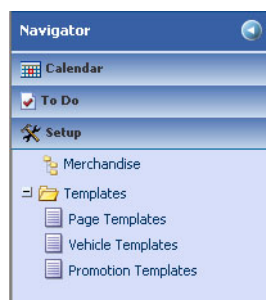
Use the Page Templates section of Setup to edit existing page templates, create new ones, and deactivate obsolete templates.

Page templates are associated with individual pages of vehicle templates.

To view page templates

1. Select Setup from Navigator, and expand the Templates folder.

**Figure 3–1 Navigator Setup Section**



2. Select Page Templates. A list of the available page templates appears in Promotion Manager.



**Figure 3–2 Promotion Manager Page Templates List**

[illegible]

3. Filter the page template list to include or exclude active or inactive templates; Select Active or Inactive. A check mark will appear before the types of templates appearing on the list.

**Figure 3–3 Promotion Manager Page Templates List Filter**

**Promotion Manager**

Page Templates   Filter

- ☒ Active
- ☐ InActive

Name	Description	Type
<u>Ad Hoc Spread BX</u>	Free flow, ad hoc template	Front Page
<u>Direct Mail Letter-Size</u>	Direct mail letter-size page tem	Standard

## To create a new page template

1. Click **New**. The page template summary window opens.

**Figure 3–4 Promotion Manager Page Template Window**

The screenshot shows the 'Promotion Manager' window with the 'Summary' tab active. The form includes the following fields and controls:

- Name:** A text input field.
- Description:** A larger text input field.
- Active:** A checked checkbox.
- Type:** A dropdown menu with 'Front Page' selected.
- Position Type:** A dropdown menu with 'Fixed' selected.
- Units:** A dropdown menu with 'in' selected.
- Page Width:** A text input field followed by 'in'.
- Page Height:** A text input field followed by 'in'.
- Footer:** 'Created By: Ken R. Smith 02/02/2007 10:27:14' and 'Last Modified By: Ken R. Smith 02/02/2007 10:27:14'.

2. Enter a name for the template.
3. Enter an optional description of the template.
4. Leave Active selected to allow this template to be associated with vehicle templates.
5. Select the page type from the Type field.
6. Select the Position Type
  - Fixed - Positions will have set locations on the page template.
  - Dynamic - Positions are fit onto the page automatically.

---

**Note:** If Dynamic is selected the Positions tab is disabled, and you cannot set the page units, width, and height.

---

7. Select the measurement units to use on the page template.
8. Enter the width of page in the Width field.
9. Enter the height of the page in the Height field.
10. Click **Save**.

To deactivate a page template

1. Select the template from the template list. Click the name. The Summary window opens.
2. Clear the Active checkbox.
3. Click **Save**. The template list opens.

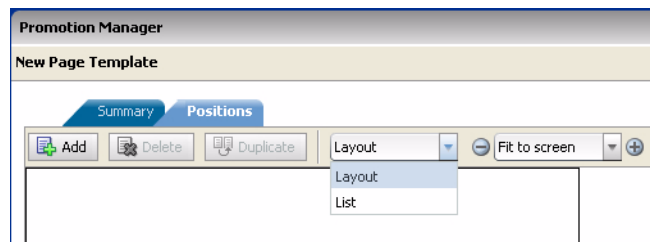
## Positions

The Positions tab of the new template window is used to organize the different promotional item locations on a fixed position page template. You can organize the positions in Layout or List view.

To view the positions on a page template

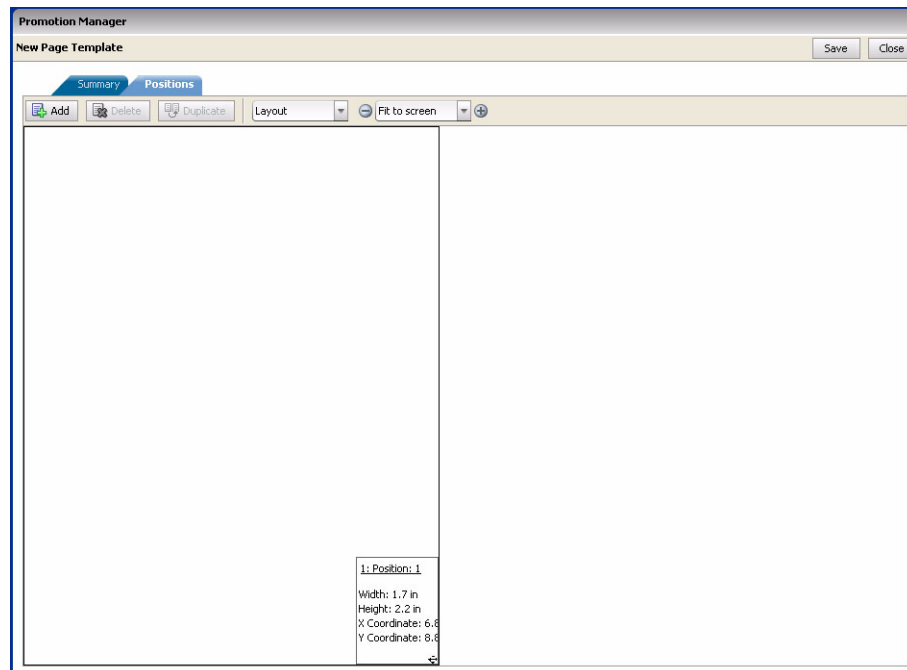
1. Select a page template from the page templates list window or create a new page template.
2. Select the Positions tab. The Positions window opens.
3. Select method to view the positions.

**Figure 3–5 Promotion Manager Page Template View Field**



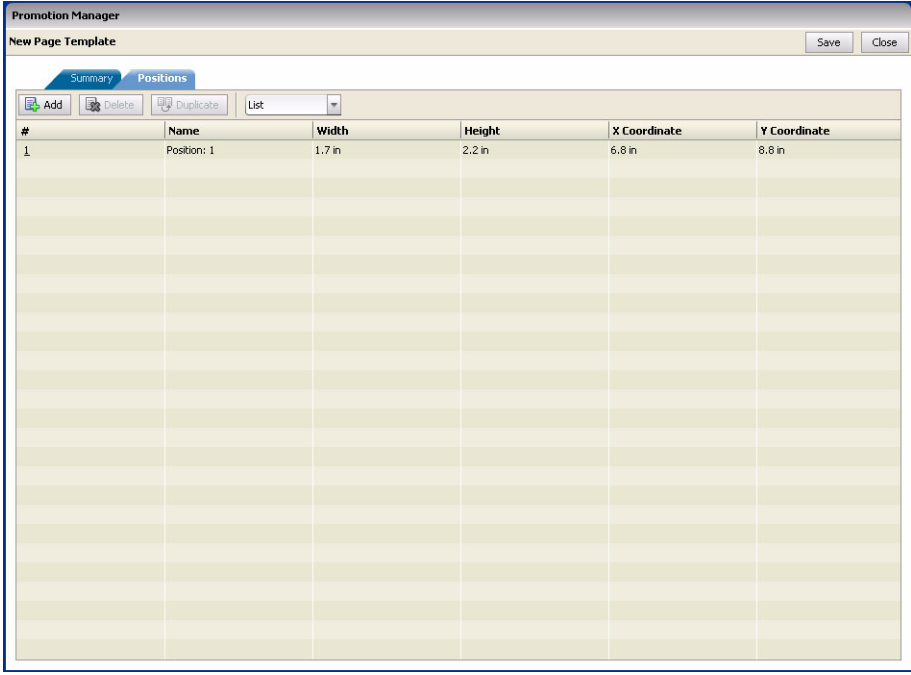
- Layout

**Figure 3–6 Promotion Manager Page Template Positions Window Layout View**



- List

**Figure 3–7 Promotion Manager Page Template Positions Window List View**



To add a position to a layout page or list:

- Click **Add**. A position block appears on the page or the list.

## To remove a position block from a layout page or list

1. Select the position block.
2. Click **Delete**. The position block is removed from the page or list.

To create a copy of a position block

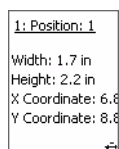
1. Select the position block.
2. Click **Duplicate**. An identically sized position block appears on the page or list.

## Lay out the Positions

You can resize and locate position blocks by setting the dimensions and position manually in layout or list view, or by drag-and-drop in layout view.

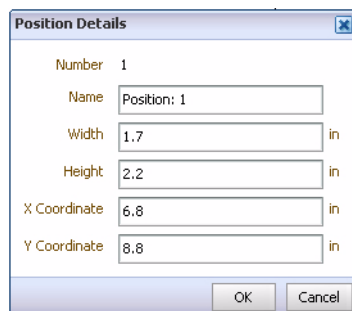
To set the dimensions and position of a position block using drag-and-drop while in layout view

1. Drag the position block to the correct location on the page.
2. Position your cursor in the lower right corner of the position block; Click and drag the position block until it is the correct size.

**Figure 3–8 Position Block**

To set the dimensions and location of a position block manually in layout view

1. Click **:Position:** on the position block. The Position Details window opens.

**Figure 3–9 Position Details Window**

2. Enter a descriptive name for the position block in the Name field.
3. Enter the width of the position block in the Width field.
4. Enter the height of the position block in the Height field.
5. Enter the X location (left/right) of the position block in the X Coordinate field.
6. Enter the Y location (up/down) of the position block in the Y Coordinate field.

---

**Note:** An X:Y location of 0: 0 is the upper left corner of a page.

---

7. Click **OK**. The position block moves to the specified location on the page.

To set the dimensions and location of a position block manually in List view

1. Select the position block by clicking the number in the # column. The position details window opens.
2. Enter a descriptive name for the position block in the Name field.
3. Enter the width of the position block in the Width field.
4. Enter the height of the position block in the Height field.
5. Enter the X location (left/right) of the position block in the X Coordinate field.
6. Enter the Y location (up/down) of the position block in the Y Coordinate field.

---

**Note:** An X:Y location of 0: 0 is the upper left corner of a page.

---

7. Click **OK**.





**Figure 3–11 Promotion Manager Vehicle Template Window**

The screenshot shows the 'Promotion Manager' window with the 'Summary' tab selected. The 'Name' field is empty. The 'Description' field is also empty. The 'Active' checkbox is checked. The 'Type' dropdown is set to 'Unadvertised special'. The 'Created By' and 'Last Modified By' fields both show 'Ken R. Smith' and the timestamp '02/02/2007 10:40:15'.

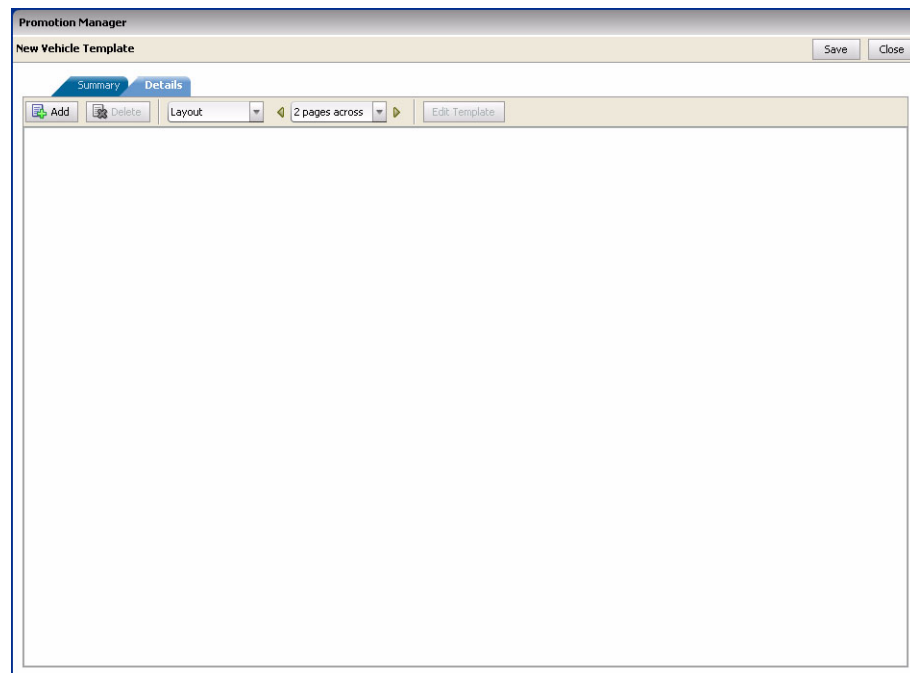
2. Enter a name for the template.
3. Enter an optional description of the template.
4. Leave Active selected to allow this template to be associated with promotion templates.
5. Select the kind of vehicle this template is for from the Type field.
6. Click **Save**.

## Details

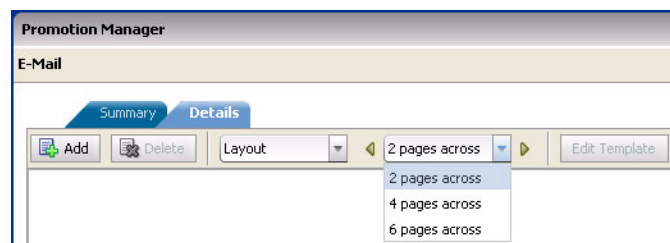
Use the details window to add and organize page templates to a vehicle template. You can view the page templates in Layout or List view.

To view the details of a vehicle template

1. Select a vehicle template from the vehicle template list or create a new vehicle template.
2. Select the Details tab. The Details window opens.
3. Select the method to view the page templates attached to the vehicle template.
  - Layout

**Figure 3–12 Promotion Manager Vehicle Template Details Window Layout View**

- Select how many pages across to view in layout view. All pages appear in the window. This setting determines how many pages appear side-by-side horizontally.

**Figure 3–13 Vehicle Templates Pages Across Field**

- List



5. Repeat this procedure to add additional pages.

To remove a page from a vehicle template in layout or list view

1. Select the page.
2. Click **Delete**. The page is removed from the template.

### Layout the Details

Use the Details window to reorder and change page templates on a vehicle template.

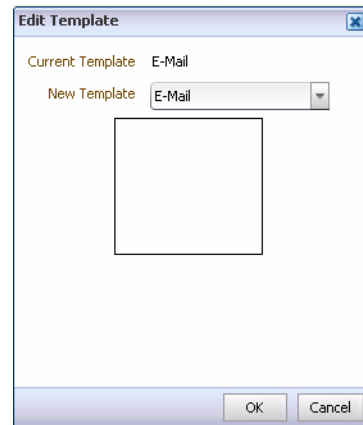
To move a page in layout or list view

- Drag the page to a different location on the details window.

To change the template assigned to a page

1. Select the page in layout or list view.
2. Click Edit Template. The Edit Template Window opens.

**Figure 3–16 Edit Template Window**



3. Select a template from the New Template field.
4. Click **OK**. The template for the page is changed.

## Promotion Templates

Promotion templates allow you to create and use standard promotions. Promotion templates contain the default tasks and milestones in the workflow. A promotion template may have a vehicle template associated with it.

To view Promotion templates

1. Select Setup from Navigator, and expand the Templates folder.
2. Select Promotion Templates. A list of the available promotion templates appears in Promotion Manager.

**Figure 3–17 Promotion Manager Promotion Templates List**

[illegible]

3. Filter the promotion template list to include or exclude active or inactive templates; Select Active or Inactive. A check mark will appear before the types of templates appearing on the list.

## To create a promotion template

1. Click **New**.

**Figure 3–18 Promotion Manager Promotion Template Window**

Promotion Manager

Save

Close

Summary

Workflow

Name

Description

Active

Vehicle

Type

Template

Budget

Created By

Ken R. Smith

02/02/2007 10:42:32

Last Modified By

Ken R. Smith

02/02/2007 10:42:32

- Enter an optional dollar amount for the promotion in the Budget field.
- 6. Click Save.**

## Workflow

Use the workflow window to design a work process for the promotion template.

To open the workflow window

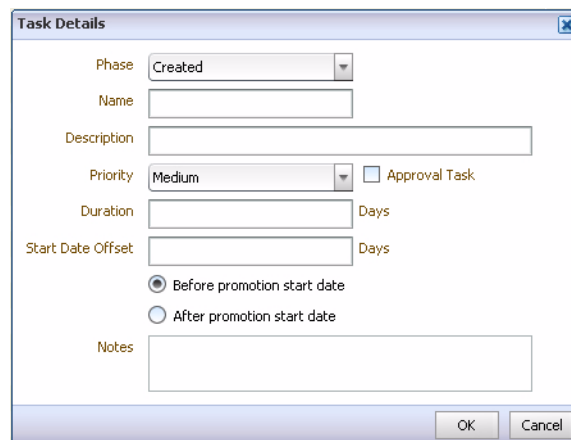
- Select the Workflow tab. The workflow window opens:

**Figure 3–19 Promotion Manager Promotion Template Workflow**

[illegible]

## To add a task to the workflow

1. Click **Add**.
2. Select **Task**. The Task Details window opens.

**Figure 3–20 Task Details Window**The image shows a 'Task Details' dialog box. It contains several fields: 'Phase' is a dropdown menu with 'Created' selected; 'Name' is a text input field; 'Description' is a larger text input field; 'Priority' is a dropdown menu with 'Medium' selected; 'Approval Task' is a checkbox that is currently unchecked; 'Duration' is a text input field followed by a 'Days' label; 'Start Date Offset' is a text input field followed by a 'Days' label; there are two radio buttons for 'Before promotion start date' (selected) and 'After promotion start date'; and 'Notes' is a text input field. At the bottom right are 'OK' and 'Cancel' buttons.

3. Select the phase the task is a part of from the Phase field.
4. Enter a name for the task in the Name field.
5. Enter optional details of the task in the description field.
6. Select the relative importance of the task from the Priority field.
7. Select Approval Task if the task is an approval task.
8. Enter the length of time in days that the task should take in the Duration field.
9. Enter the number of days that the task should start in relation to the promotion start date in the Start Date Offset field.
10. Select Before or After promotion start date to set when the Start Date Offset should occur.
11. Enter optional considerations for the task in the Notes field.
12. Click **OK**. The task is added to the workflow list.

To add a milestone to the workflow

1. Click **Add**.
2. Select Milestone. The Milestone Details window opens.



**Figure 3–21 Milestone Details Window**

3. Select the phase the milestone occurs in from the Phase field.
4. Enter a name for the milestone in the Name field.
5. Enter optional details of the Milestone in the description field.
6. Enter the number of days that the milestone should start in relation to the promotion start date in the Start Date Offset field.
7. Select Before or After promotion start date to set when the Start Date Offset should occur.
8. Enter optional considerations for the milestone in the Notes field.
9. Click **OK**. The milestone appears on workflow list.

### Layout the Workflow

Use the workflow window to redefine tasks and milestones on the promotion template.

To change the name of a phase

1. Click on the name of the Phase in the Name field. The Phase Details window opens.

**Figure 3–22 Phase Details Window**

2. Edit the name of the Phase.
3. Click **OK**. The name changes on the workflow list.

To move a task or milestone

- Drag the task or milestone to a different location on the workflow list. You can move a task or milestone within or outside its current phase. If you move a task or milestone outside the current phase, the phase will be update with the new phase.

To edit the details of an existing task or milestone:

1. Select the task by clicking on its name in the Name field of the workflow list. The Task or Milestone Details window opens.
2. Edit the details as necessary.
3. Click **OK**.

To remove a task or milestone from the workflow

1. Select the task or milestone.
2. Click **Delete**. The task or milestone is removed from the workflow list.

---

## Campaigns and Events

Campaigns define the overall theme for a series of promotions. Use them to group multiple promotions together. Use events to provide context for planning your campaigns and promotions.

### Create Campaign

A campaign is an event that defines the marketing theme for your promotions. You can associate one or more promotions with a campaign.

To create a campaign from the calendar

1. Click **New**.
2. Select Campaign. The Campaign Details window opens.

**Figure 4–1** Campaign Details Window



The screenshot shows a window titled "Campaign Details". It contains four input fields: "Name" (a single-line text box), "Description" (a multi-line text area), "Start Date" (a date picker showing 02/08/2007), and "End Date" (a date picker showing 02/08/2007). At the bottom of the window are two buttons: "Save" and "Cancel".

3. Enter a name for the campaign in the Name field.
4. Enter details about the campaign in the Description field.
5. Enter when the campaign will begin in the Start Date field.
6. Enter when the campaign will stop in the End Date field.

7. Click **Save**. The campaign is added to the calendar.

To create a campaign from Navigator

1. Select the Calendar section of Navigator
2. Click **Create Campaign**. The Campaign Details window opens.
3. Follow steps 3-7 above to create a new campaign.

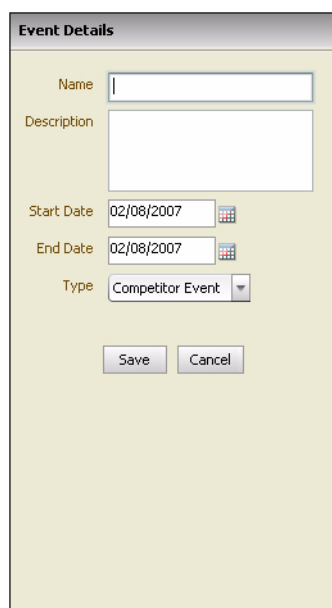
## Create Event

Use events to define activities that are relevant to the promotional calendar. You may want to plan promotions around company events like store openings or competitors' promotions. It may be useful to enter and view your personal appointments on the promotion calendar so you can see all events in one place.

To create an event from the calendar

1. Click **New**.
2. Select Event. The Event Details window opens.

**Figure 4–2 Event Details Window**



3. Enter a name for the event in the Name field.
4. Enter details of the event in the Description field.
5. Enter when the event will begin in the Start Date field.
6. Enter when the event will stop in the End Date field.
7. Select the type of event from the Type field.
  - § Competitor Event
  - § Company Event
  - § Personal Event
8. Click **Save**. The event is added to the calendar.

To create an event from Navigator

1. Select the Calendar section of Navigator
2. Click **Create Event**. The Event Details window opens.
3. Follow steps 3-8 above to create a new event.



---

## Promotions

Promotions are the individual events or advertising you use to drive increased sales. A promotion is a combination of a specific time period, media, and individual offers for merchandise.

You may not be able to edit a promotion in the following circumstances:

- You do not have permission to edit promotions.
- The promotion is in the planning phase, you are not the owner, and you do not have a task assigned to you.
- The promotion is being edited by another user.

### Create a Promotion

You first create the basic promotion and add it to the calendar.

To create a promotion from the calendar

1. Click **New**.
2. Select Promotion. The Promotion Details window opens to the right.

**Figure 5–1** Promotion Details Window

The screenshot shows a 'Promotion Details' window with the following fields and controls:

- Name:** A text input field.
- Description:** A larger text input area.
- Start Date:** A date picker showing '02/08/2007'.
- End Date:** A date picker showing '02/08/2007'.
- Campaign:** A text input field with an edit icon (pencil) to its right.
- Budget:** A text input field showing '\$0.00'.
- Template:** A dropdown menu currently showing 'Ad Hoc Promo'.
- Buttons:** 'Open', 'Save', and 'Cancel' buttons at the bottom.

3. Enter a name for the promotion in the Name field.
4. Enter details of the promotion in the Description field.
5. Enter when the promotion will begin in the Start Date field.
6. Enter when the promotion will stop in the End Date field.
7. Select the campaign that the promotion is a part of from the Campaign field.
  - a. Click the Search button (Pencil icon). The Campaigns search window opens.

**Figure 5–2 Campaigns Search Window**

- b. Limit the Search.
    - Name - Enter all or part of the campaign name.
    - Start Date - Select a Start Date
    - End Date - Select an End Date
  - c. Click **Search**. The Campaigns matching the search criteria appear in the Select Campaign list.
  - d. Select the campaign.
  - e. Click **OK**. The campaign is added to the promotion.
8. Enter an amount in the Budget field.
9. Select a template to use from the Template field.
10. Click **Save**. The promotion is added to the calendar.
  - Click **Open** before clicking **Save** to add details to the new promotion.

To create a promotion from Navigator

1. Select the Calendar section of Navigator
2. Click **Create Promotion**. The Promotion Details window opens.
3. Follow steps 3-10 above to create a new promotion.

## Open a Promotion

After a promotion is created and added to the calendar you open it from the calendar so you and other users can add the necessary details. Promotions can also be opened when they are created.



To open a promotion

1. Click the name of the promotion in Promotion Manager. The Promotion Details window opens to the right.
2. Click **Open**. The Promotion Manager changes to a tabbed window with the Summary window open.

**Figure 5–3 Promotion Manager Summary Window**

## Promotion Manager

Promotion Manager is where you design and add details to your promotions. It contains the Merchandise Selector and the following tabs:

- Summary
- Vendor Deals
- Categories
- Offers
- Vehicle Design
- Workflow

## Summary

The Summary window displays descriptive information for the promotion. You can change information on the Summary window if you have permission to edit promotions. The bottom of the Summary window displays the name of the owner,

creator, and the last person to modify the promotion as well as the dates of creation and last modification.

To add summary details to a promotion

1. Select the Summary tab of Promotion Manager. The Summary window opens.

**Figure 5–4 Promotion Manager Summary Window**

**Promotion Manager**

New Promotion - 08/01/2006 - 08/01/2006 Created

Export Save Close

**Summary** Vendor Deals Categories Offers Vehicle Design Workflow

Name: New Promotion

Description:

Template: Ad Hoc Promo

Begin Date: 08/01/2006 End Date: 08/01/2006

Status: [dropdown]

Campaign: [dropdown]

Set: [dropdown] Subsets:

Stores: [dropdown]

Budget: [text] Actual: [text]

Cost: [text]

Type: [dropdown] Template: Ad Hoc Circ

Vehicle: Circular

Owner: Ann T Smith

Created By: Ann T Smith August 01, 2006 15:31 PM

Last Modified By: Ann T Smith August 01, 2006 15:32 PM

2. Select the Status of the promotion.

---

**Note:** Use the red, yellow, or green (traffic light) status indicator to alert yourself or other users to potential problems with a promotion.

---

3. Select the set of stores that the promotion will apply to in the Stores section.
  - a. Click the Search button (pencil icon). The Store Sets and SubSets search window opens.

**Figure 5–5 Store Sets and SubSets Search Window**

- b. Select a set from the Store Set field.
- c. Enter all or part of a name in the Store Subset Name field, or leave the field blank.
- d. Click **Search**. The subsets that meet the search criteria appear in the Available Subsets list.

**Figure 5–6 Store Sets and SubSets Search Window with Available Subsets**

- e. Select the necessary subsets from the Available list.
  - f. Click the right arrow to move the subsets to the Selected list.  
Click the double right arrow to move all the subsets to the Selected list.
  - g. Click **OK**. The store sets and subsets are assigned to the promotion.
4. Enter the actual cost in the Actual field if it is known.
  5. If a vehicle template has not been associated with the promotion, select the method of promotion from the vehicle field.
  6. If a vehicle template has not been associated with the promotion, select the template to be used for the vehicle from the Template field.
  7. Click **Save** to update the promotion with the information.
  8. Enter information on the other Promotion Manager windows as needed.

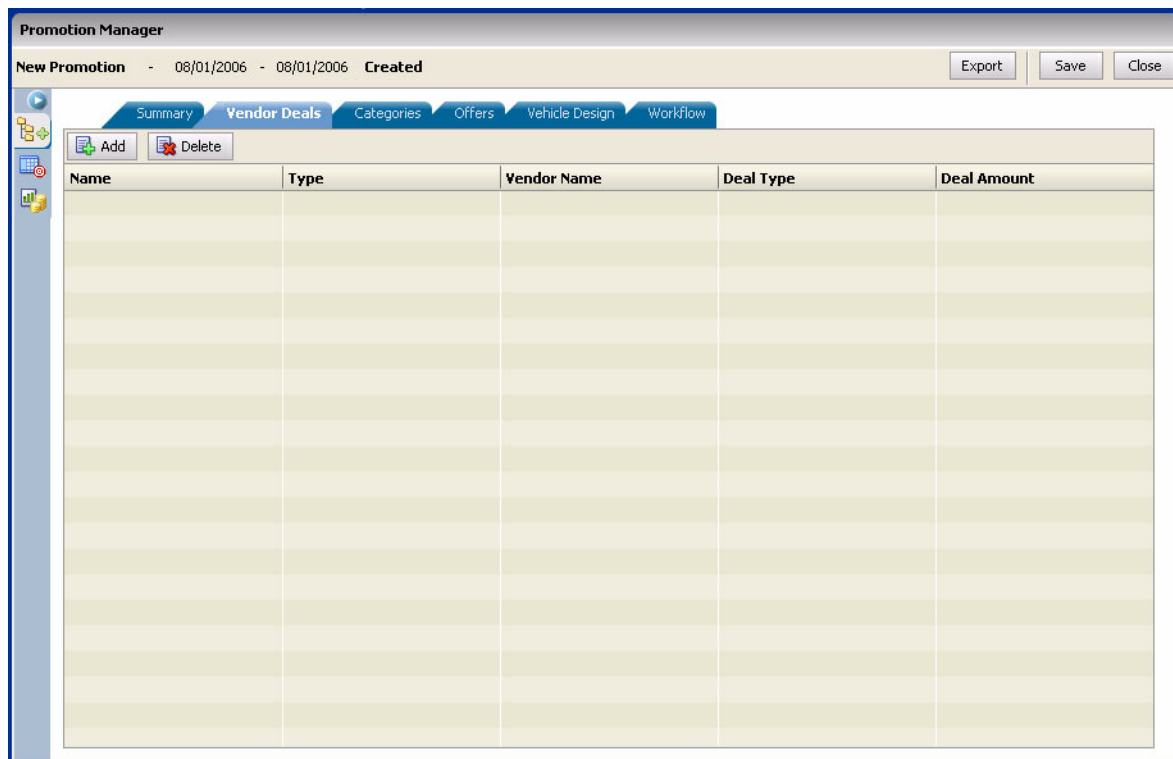
## Vendor Deals

The Vendor Deals window lists the deals defined for the promotion. You can add or delete vendor deals from the Vendor Deals window.

To add a vendor deal

1. Open an existing promotion.
2. Select the Vendor Deals tab of Promotion Manager. The Vendor Deals window opens.

**Figure 5-7 Promotion Manager Vendor Deals Window**



- 3. Click **Add**.** The Vendor Deal Details window opens.

**Figure 5–8 Vendor Deal Details Window**

4. Select the type of vendor deal:
  - Off Invoice - You receive a percentage or monetary amount off a vendor or supplier invoice in exchange for advertising specific merchandise on a promotion.
  - Ad Space - The vendor agrees to pay you a percentage or monetary amount of an advertisement in exchange for something such as front page exposure.
  - Presentation - The vendor agrees to pay you a percentage or monetary amount in exchange for stores presenting merchandise in a specific location such as an end cap.
  - Volume Purchase - A vendor or supplier agree to provide vendor funding for promotional advertising after an agreed upon minimum monetary amount or quantity is received.
5. Enter a name for the deal in the Name field.
6. Enter details of the deal in the Description.
7. Enter the name of the vendor offering the deal in the Vendor Name field.
8. Enter details about the vendor offering the deal.
9. Select the target of the deal:
  - Promotion
  - Category
    - Drag a category from the merchandise selector to the Drag a Category here bar above the Target field.

**Figure 5–9 Target Field**

- Item
  - Drag an item from the merchandise selector to the Drag an item here bar above the Target field.

**Figure 5–10 Target Field**



10. Enter vendor deal type specific information:
  - For an ad space deal
    - Enter the minimum ad space in the Min Space % field.
  - For a presentation deal
    - Enter the location in the Location field.
  - For a volume purchase deal
    - Enter the minimum volume to receive the deal in the Volume Min field.
    - Select if the minimum is Units or Dollars.
    - Select if the deal is at Purchase or Sales from the Taken at field.
11. Select the deal type
  - % Off (Percent off)
  - \$ Off (Dollar off)
12. Enter the amount of the deal in the Deal Amount field.
13. Enter an associated purchase order number in the Purchase Order field.
14. Click **OK** to add the vendor deal to the list.

To delete a vendor deal

1. Select the row of the deal to delete.
2. Click **Delete**. The Confirm window opens.
3. Click **Yes** to delete the deal.

## Categories

Use the Categories window to view the level of the merchandise hierarchy on a promotion and to add and delete merchandise categories from the promotion.

To add categories to a promotion

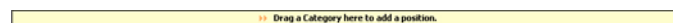
1. Select the Category tab of Promotion Manager. The Category window opens.

**Figure 5–11 Promotion Manager Category Window**

Category	Name	Target	Actual	ROI	Lift	Base Units	Incr Units	Tot Units	Base Sales
32	Barbie & Accessories	35%	7.69%	1,302.87%	275%	1,108	3,055	4,163	\$42,091.00
23	Games	20%	3.85%	0%	0%	0	0	0	\$0.00
18	Trucks	25%	0%	0%	0%	0	0	0	\$0.00
11	Action Figures	10%	7.69%	0%	0%	0	0	0	\$0.00
30	Infant Toddler Dolls	10%	0%	0%	0%	0	0	0	\$0.00
<b>Promotion Performance</b>		100%	19.23%	100.22%	275%	1,108	3,055	4,163	\$42,091.00

Drag a Category here to add it to the Category List

2. Navigate to the category to add using the Merchandise Selector.
3. Drag the category to the bar at the bottom of the window. The category appears in the table.

**Figure 5–12 Drag Category Here Bar**

4. Click the Target link in the Target column. The Target window opens.

**Figure 5–13 Target Window**

5. Enter a target space allocation percentage in the Target field.
6. Click **OK**. The Target column changes in the table.

To delete categories from a promotion

1. Select the row of the category to delete.
2. Click **Delete**. The Confirm window opens.
3. Click **Yes** to delete the category.

# Offers

Use the Offers window to construct the offers that appear on the promotion vehicle. You can use the forecasting and what-if functions found on the Offers Details window to plan your promotion and measure the impact before implementing it. Create like item associations to enhance the predictions.

See the end of this chapter for details on the tools you can use to plan promotions.

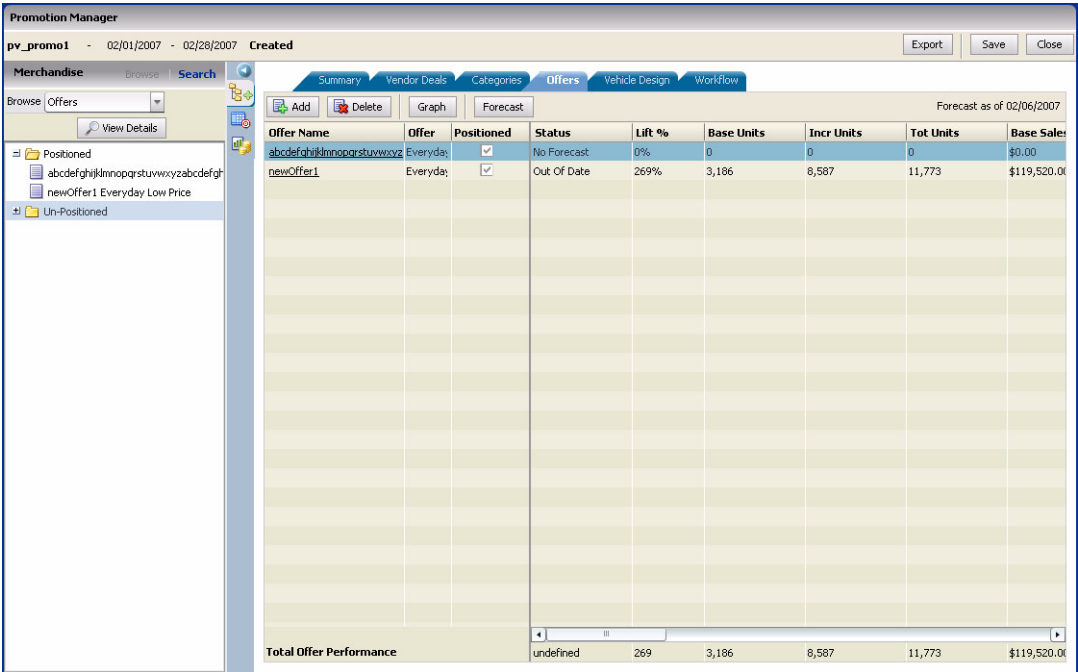
## Offer Performance

Use the procedures below to create and manage offers.

To add an offer

1. Select the Offers tab of Promotion Manager. The Offers window opens.

Figure 5–14 Promotion Manager Offers Tab



2. Click **Add**. The Offer Details window opens with the Offer & Performance window open.



Figure 5–15 Offer Details Offer &amp; Performance Window

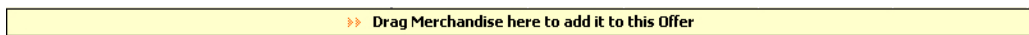
3. Enter a name for the offer in the Offer Name field.

---

**Note:** if it is left blank, the Offer name field defaults to the name of the first item on the offer.

---

4. Select the type of Offer in the Offer Type field. Your offer types may vary. The following are the basic offer types supported by Promotion Planning and Optimization.
  - \$ Off - A specific monetary amount off the items on the offer.
  - % Off - A specific percentage off the price of the items on the offer.
  - Discount Price - A specific price for an item on the offer.
  - Everyday Low Price - The regular low price of an item on the offer.
  - Buy One... - An additional item or discount off an additional item with the purchase of one or more items.
  - Free Gift with Purchase - A gift for purchasing an item.
  - Instant Rebate - A monetary amount given back for purchase of an item.
5. Enter, or select the amount or percentage off in the Offer Amount field.
6. Add any additional descriptive or instructive information to the Notes field.
7. Open the Merchandise Selector to the Assigned Categories view.
8. Drag the items or categories to the bar at the bottom of the table. The merchandise is added to the offer. You can select multiple items or categories by holding down the Ctrl or Shift key and clicking items. Drag one level above item to add all the items in the level.

**Figure 5–16 Drag Merchandise Here Bar**

9. Click **OK**. to close the Offer Details window. The offer appears in the list on the Offers window.

To delete an offer

1. Select the row of the offer to delete.
2. Click **Delete**. The Confirm window opens.
3. Click **Yes** to delete the offer.

**Like Items** Create like item associations for items that may not have enough history to produce accurate baseline predictions.

To create a like item

1. Select the item that needs a like item using the merchandise selector.
2. Click **View Details**. The Details window opens.
3. Navigate to the item you want to associate the selected item with using the merchandise selector.
4. Drag the like item to “Drag an item here” on the Details window. The item’s details appear in the Like Items area of the Details window.
5. Click **OK**.

To remove a like item association


1. Navigate to the item you want to disassociate with a like item using the merchandise selector.
2. Click **View Details**. The Details window opens.
3. Click the Delete button in the Like Item area. The Like Item is removed.
4. Click **OK**.

**Affinity** Use the Affinity feature to help design better promotions. Promotion Planning and Optimization can help identify these affinity effects:

- Halo - the sales increase in non-promoted items that are normally purchased with or instead of the promoted item.
- Cannibalization - the sales decrease in non-promoted items because customers buy promoted items instead.

View affinity details for an item

1. Select an item from the Offer Details window.
2. Click **Affinity Details**. The Item Affinity Window opens showing the halo and cannibalization effect at the category level for the selected item.

**Figure 5–17 Item Affinity Window**


The screenshot shows a window titled 'Item Affinity' with a subtitle 'T0000048981 - BB Beautiful Bride'. It contains a table with the following data:

Name	Base Units	Incr Units	Tot Units	Base Sales	Incr Sales	Tot Sales	Base Margin	Incr Margin	Tot Margin
Toys: Barbie & Accs	5,337	2,349	7,686	\$130,777.67	\$57,542.17	\$188,319.84	\$65,388.83	\$28,771.09	\$94,159.92

At the bottom right of the window is an 'OK' button.

3. Click **OK** to close the Item Affinity window.

**Forecasting** Use forecasting to update the performance metrics for promotions. Performance metrics help you make promotion decisions. Forecasting metric values can be viewed from the following locations in Promotion Planning and Optimization:

- The Offers window
- The Offers & Performance section of the Offer Details window
- The What-If tab of the Offer Details window
- The Promotion Performance window of the Merchandise Selector

Forecasting metric values are available at the following levels:

- Offer - From the Offer window
- Category - From the Category window
- Page - From holding the cursor over a page on the Vehicle Designer thumbnail view
- Promotion - From the Promotion Performance window

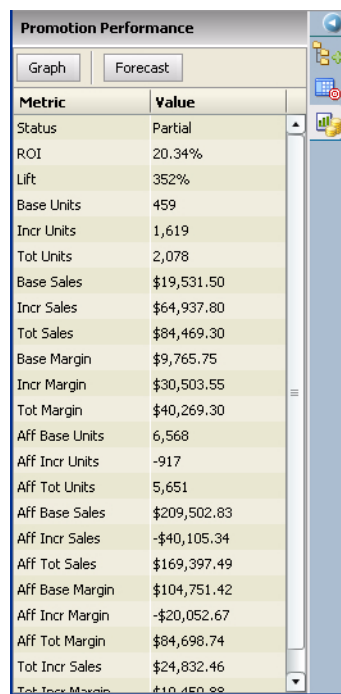
To forecast performance

- Click Forecast to update the performance metrics for the offer or promotion.

---

**Note:** If you have a row selected on the Offers window the forecast will run for the offer. If nothing is selected, the forecast will be for the promotion. If you click Forecast on the What-if window, the current offer and what-if scenario is updated.

---

**Figure 5–18 Promotion Performance Metrics**


Metric	Value
Status	Partial
ROI	20.34%
Lift	352%
Base Units	459
Incr Units	1,619
Tot Units	2,078
Base Sales	\$19,531.50
Incr Sales	\$64,937.80
Tot Sales	\$84,469.30
Base Margin	\$9,765.75
Incr Margin	\$30,503.55
Tot Margin	\$40,269.30
Aff Base Units	6,568
Aff Incr Units	-917
Aff Tot Units	5,651
Aff Base Sales	\$209,502.83
Aff Incr Sales	-\$40,105.34
Aff Tot Sales	\$169,397.49
Aff Base Margin	\$104,751.42
Aff Incr Margin	-\$20,052.67
Aff Tot Margin	\$84,698.74
Tot Incr Sales	\$24,832.46
Tot Incr Margin	\$10,450.88

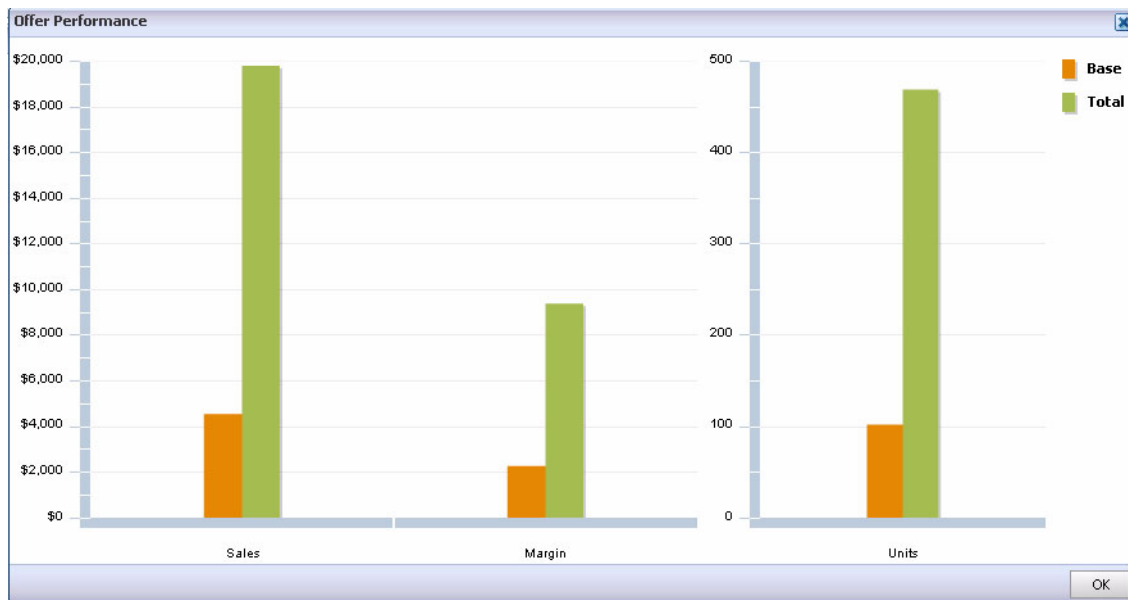
The status of the forecast will update to one of the following:

- Not Forecasted - A forecast has never been run, or a previously forecast offer was removed from a vehicle.
- Current - A forecast has run successfully.
- Unable to Forecast - A forecast cannot complete because there is no model associated with the category or there is no predicted baseline for the item.
- Out of Date - A forecast is out of date because the offer changed.
- Failed - A forecast request failed due to a connection failure or some other reason.

**Graphing** Use graphs to view the past and potential performance of a promotion. You can view graphs from the Offers, Offer Details, and Promotion Performance windows.

To graph the performance of an item

1. Select an item or offer from the Offers or Offer Details window.
2. Click **Graph**. The Promotion Performance window opens with the projected performance of the promotion appearing on graphs.

**Figure 5–19 Promotion Performance Graph**

### What-if

Use the what-if feature of Oracle Retail Promotion Planning and Optimization to compare the forecasts for items on offers if you change the parameters.

View a what-if scenario

1. Select the What-If tab of the Offer Details window. The What-If window opens with the current offer and two What-If scenarios displayed.

**Figure 5–20 Offer Details What If Window**

The window displays three columns: Current Offer, What-If - 1, and What-If - 2. Each column shows offer details and a list of metrics.

Current Offer	What-If - 1	What-If - 2
Offer Name: newOffer1	Offer Name: newOffer1	Offer Name: newOffer1
Offer Type: Everyday Low Price	Offer Type: Everyday Low Price	Offer Type: Everyday Low Price
Offer Amount:	Offer Amount:	Offer Amount:
Vehicle Type: Circular	Vehicle Type: Circular	Vehicle Type: Circular
Status: Out Of Date	Status: No Forecast	Status: No Forecast
Lift %: 269%	Lift %:	Lift %:
Base Units: 3,186	Base Units:	Base Units:
Incr Units: 8,587	Incr Units:	Incr Units:
Tot Units: 11,773	Tot Units:	Tot Units:
Base Sales: \$119,520.00	Base Sales:	Base Sales:
Incr Sales: \$321,945.00	Incr Sales:	Incr Sales:
Tot Sales: \$441,465.00	Tot Sales:	Tot Sales:
Base Margin: \$59,760.00	Base Margin:	Base Margin:
Incr Margin: \$160,972.50	Incr Margin:	Incr Margin:
Tot Margin: \$220,732.50	Tot Margin:	Tot Margin:
Aff Base Units: 10,674	Aff Base Units:	Aff Base Units:
Aff Incr Units: 4,698	Aff Incr Units:	Aff Incr Units:
Aff Tot Units: 15,372	Aff Tot Units:	Aff Tot Units:
Aff Base Sales: \$261,555.34	Aff Base Sales:	Aff Base Sales:
Aff Incr Sales: \$115,084.35	Aff Incr Sales:	Aff Incr Sales:

2. Change the details in the What-If columns.

- Offer Name
  - Enter a new name for the offer.
- Offer Items
  - Click the Pencil button next to the name of the offer. The Modify Offer window opens.
  - Drag merchandise to the window as you would if you were creating an offer. This only adds merchandise to the what-if scenario, not the offer.
  - Click OK to update the what-if scenario.
- Offer Type
  - Select a different offer type.
- Offer Amount
  - Enter a different amount off, or select a different percent off.
- Vehicle Type
  - Click the Pencil button next to the vehicle type. The Modify Vehicle window opens.

**Figure 5–21 Modify Vehicles Window**

The screenshot shows the 'Modify Vehicles' dialog box. It has a title bar with the text 'Modify Vehicles'. Inside, there is a list of vehicle types, each with a checkbox. The 'Circular' checkbox is checked. Below it are two dropdown menus: 'Feature Type' (set to 'Feature') and 'Page Location' (set to 'Front'). Below these are several other vehicle types, each with an unchecked checkbox: 'Direct Mail', 'Email', 'End Cap', 'In-Store Display', 'None', and 'ROP'. At the bottom of the dialog are two buttons: 'OK' and 'Cancel'.

- Select or clear vehicle types.
  - Click OK to update the what-if scenario.
3. Repeat step 2 for what-if scenario 2.
  4. Click Forecast to update the metrics for the what-if scenario

### Position Details

Use the Position Details window to set the details of an offer's position on a vehicle page.

To open an offer

1. Select the Offers tab of Promotion Manager. The Offers window opens.
2. Click the name of the offer. The Offer Details window opens.

To set the position details

---

**Note:** This tab will not be enabled until the offer has been positioned from the Vehicle Design window.

---

1. Open an offer. The Offer Details window opens.
2. Select the Position Details tab. The Position Details window opens.

**Figure 5–22 Offer Details Position Details Window**

3. Select the type of position from the Feature Type field.
  - Feature
  - Liner
4. Enter a number in the Coupon # field if applicable.
5. Select an image
  - a. Click the Search button (Pencil icon). The Images search window opens.

**Figure 5–23 Images Search Window**

- b. Limit the search
  - Filename - Enter all or part of the name of the file.
  - Keyword - Enter keywords associated with the file.
  - Created After - Select a date from the calendar.
- c. Click **Search**. Results appear in the Select Image list.
- d. Select the image to attach to the position.

**Figure 5–24 Images Search with Image Selected**

File Name	Keywords	Created Date
boobah.jpg	Boobah	02/04/2007

- e. Click **OK**. The image is attached to the position and appears on the Position Details window.

---

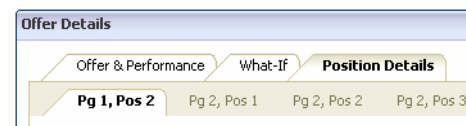
**Note:** Click the **Delete** button to remove an image. Note that you will not get a delete confirmation request.

---



6. Enter text to appear at the top of a position in the Heading field.
7. Enter text to appear with a position in the Ad Copy field.
8. Enter additional explanatory information in the Comments field.
9. Select the next page and position by clicking on the Pg x, Pos y tab. Repeat steps 3 to 8 as necessary.

**Figure 5–25 Position Details Window Position Tabs**



## Vehicle Design

Use Vehicle Design to allocate whitespace for a vehicle, and layout offers in the space allocated.

A vehicle might be:

- A circular
- A newspaper ad
- Run of Press (ROP)
- Direct mail
- Email
- An in-store display
- An end cap
- A TV ad

## Vehicle Construction

Use the procedures below to view, add, and edit the pages of the promotion vehicle.

To view the vehicle design legend

- Click Legend in the upper-right corner of Vehicle Designer. The Legend window opens.

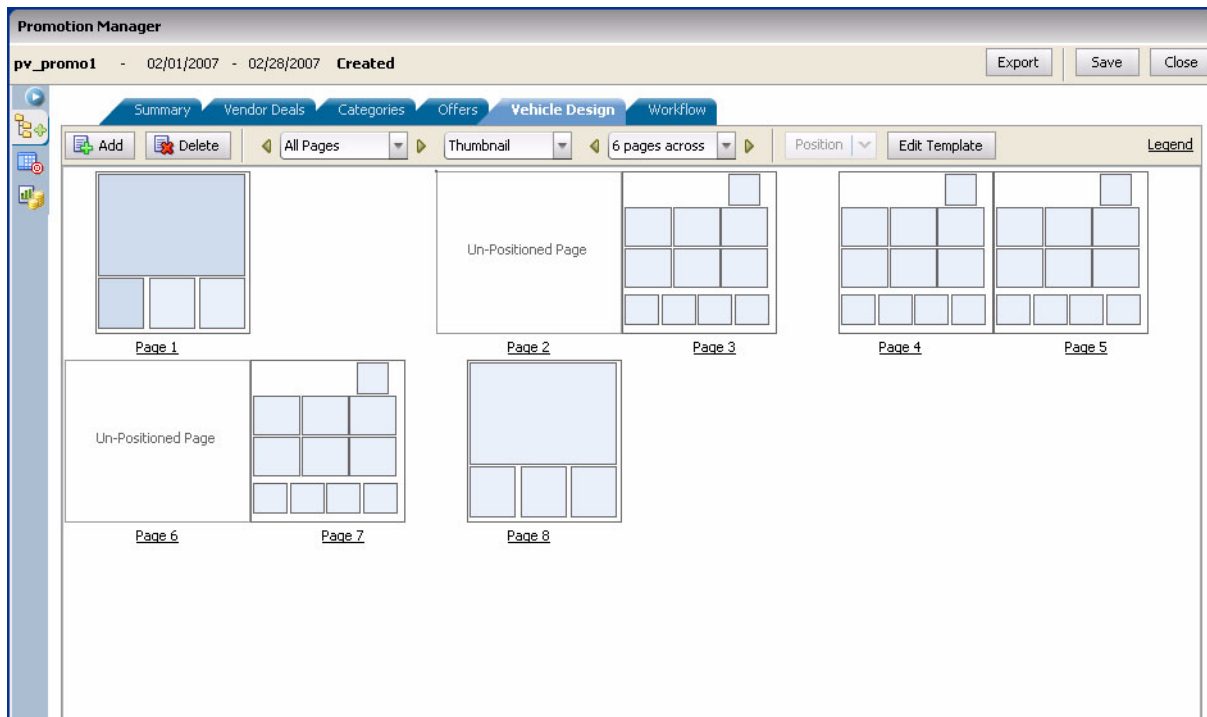
**Figure 5–26 Vehicle Design Legend Window**



To view all pages of a vehicle

1. Select All Pages.
  - Select Thumbnail. The Vehicle Designer changes to thumbnail view.

**Figure 5–27 Promotion Manager Vehicle Design Window Thumbnail View**



- Select the number of pages across to view.
- Select List. The Vehicle Designer changes to List view.

**Figure 5–28 Promotion Manager Vehicle Design Window List View**

#	Position	Category Name	Category ID	Offer Name	Offer	Access
1	Alt Focus	Barbie & Accessories	32	<a href="#">Create offer</a>		Read/Write
2	Grid	Barbie & Accessories	32	<a href="#">Create offer</a>		Read/Write
3	Grid	Barbie & Accessories	32	<a href="#">Create offer</a>		Read/Write
4	Grid	Barbie & Accessories	32	<a href="#">Create offer</a>		Read/Write
5	Grid	Barbie & Accessories	32	<a href="#">Create offer</a>		Read/Write
6	Grid	Barbie & Accessories	32	<a href="#">Create offer</a>		Read/Write
7	Grid	Games	23	<a href="#">Create offer</a>		Read/Write
8	Foot	Games	23	<a href="#">Create offer</a>		Read/Write
9	Foot	Games	23	<a href="#">Create offer</a>		Read/Write
10	Foot	Games	23	<a href="#">Create offer</a>		Read/Write
11	Foot	Games	23	<a href="#">Create offer</a>		Read/Write

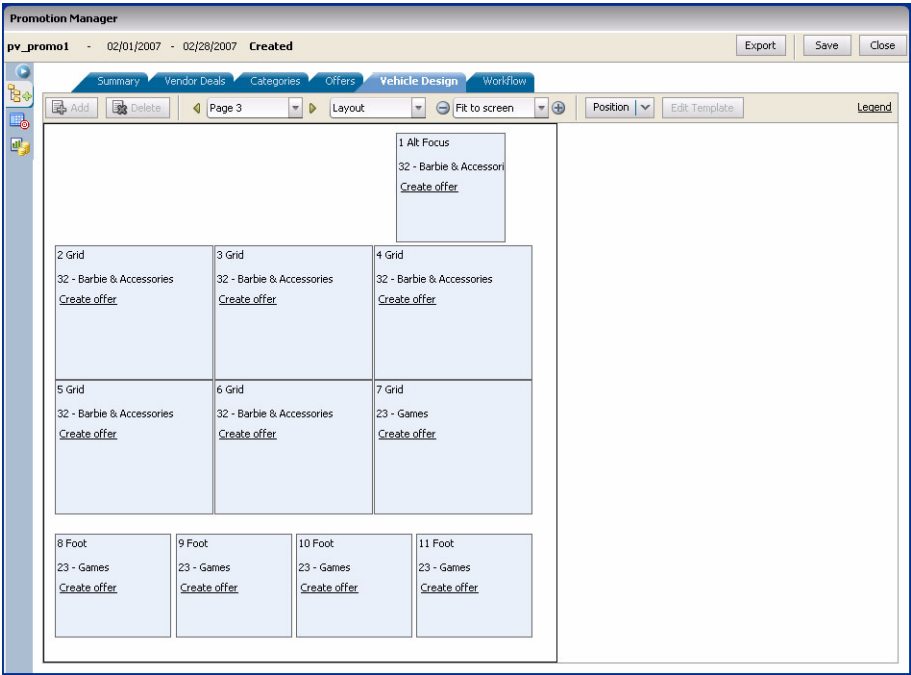
To reorder pages of a vehicle

- Drag the page to a new location if in Thumbnail view.
- Drag the page to a new row if in List view.

To select a specific page

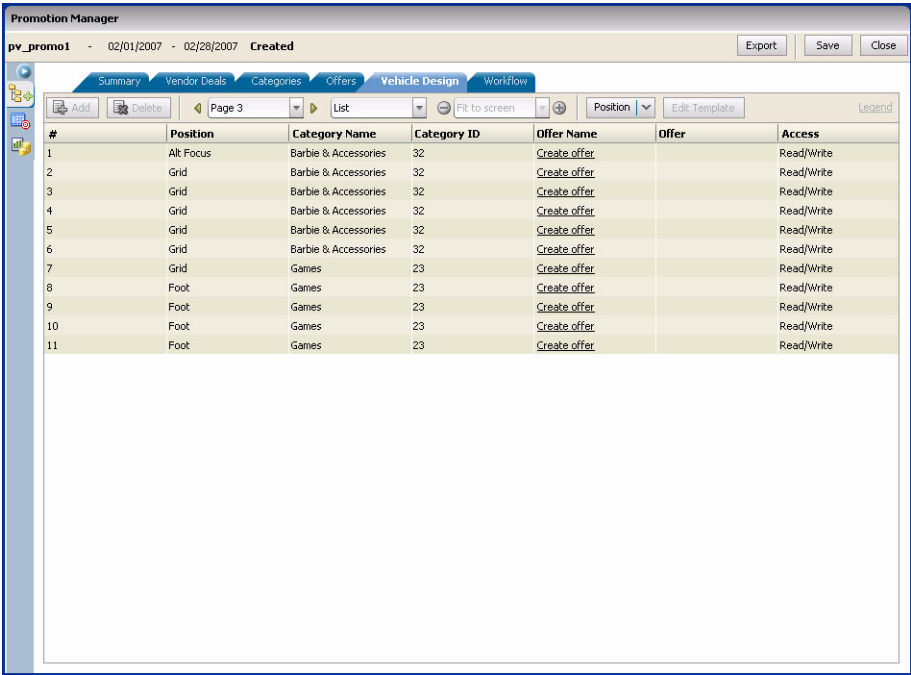
1. Select a specific page:
  - Select the page from the page list field.
  - Use the arrows to the left and right of the page list field to navigate to the page.
  - Select the page number from the # column in the List view.
  - Click the page number under the thumbnail in Thumbnail view.
2. Select the type of view:
  - Layout

Figure 5–29 Promotion Manager Vehicle Design Window Layout View



- List

Figure 5–30 Promotion Manager Vehicle Design Window List View



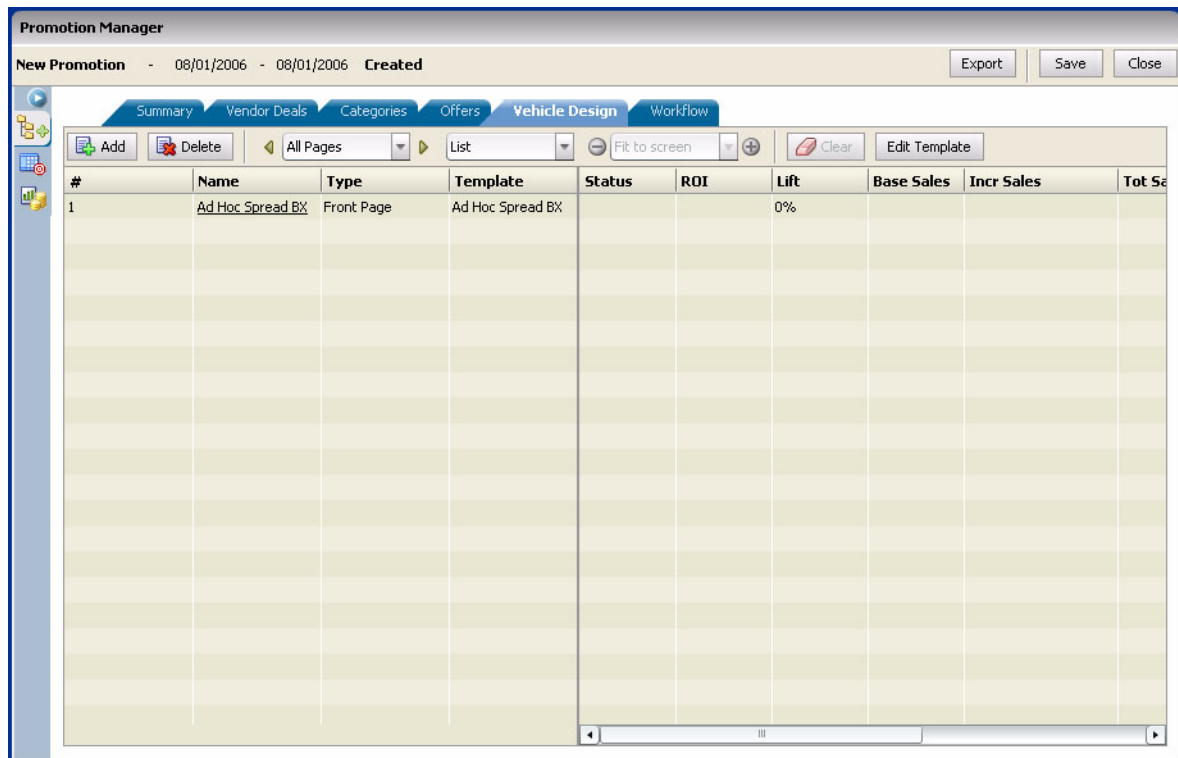
3. Select how to arrange the Layout view:
  - Fit to Screen
  - Fit Width

- Fit Height
- Custom View - Use the + and - buttons to zoom in and out.

To add a page to the promotion vehicle

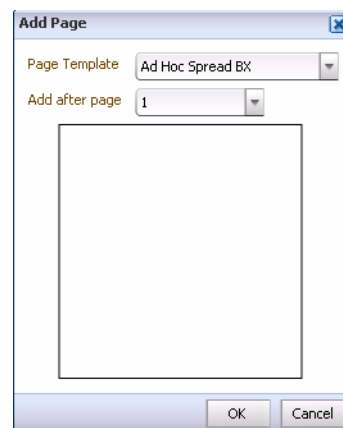
1. Select the Vehicle Design tab in Promotion Manager. The Vehicle Design window opens.

**Figure 5–31 Promotion Manager Vehicle Designer Window**



2. Click **Add**. The Add Page window opens.

**Figure 5–32 Vehicle Design Add Page Window**



3. Select the template to use for the page from the Page Template field.

4. Select where to add the page to the vehicle from the Add after page field.
5. Click **OK**. The page is added to the vehicle and the details appear on the table of the vehicle design window.

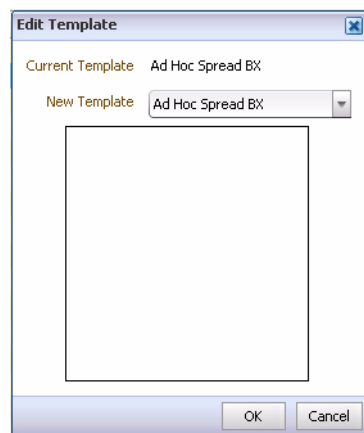
To delete a vehicle page

1. Select the page from the table on the vehicle design window.
2. Click **Delete**. The Confirm window opens.
3. Click **OK**. The page is removed from the vehicle.

To change the template used for a page

1. Select the page from the table.
2. Click **Edit Template**. The Edit Template window opens.

**Figure 5–33 Vehicle Design Edit Template Window**



3. Select a template from the New Template field.
4. Click **OK**. All previous work will be lost.

To view and edit position details of a vehicle page

1. Click the page number in the # column. The page details open.
2. View and edit the vehicle page using the procedures below.

To remove an item from a page

1. Select the item to be removed.
2. Select Clear from the Position field.
3. Click **Yes** to remove the item.

---

**Note:** Offers that are removed appear as Unpositioned offers on the Offers window and Offers list in the Merchandise Selector.

---

To cut, copy, and paste items on a page

1. Select the item you want to move or copy.
2. Select cut or copy from the Position field.

3. Select the location you want to paste the item.
4. Select paste from the position field.

### Categories and Offers

Use the procedures below to create offers, and position categories and offers on a promotion vehicle. You first assign categories to positions on a vehicle page (allocate whitespace). You then assign offers based on the assigned categories to the vehicle positions. You can create offers directly from the vehicle design window without navigating to the Offers window.

To assign categories to vehicle positions (allocate whitespace)

1. Select a page. The page details open.
2. Open the Merchandise Selector.
3. Select Assigned Categories from the Show field. The Categories assigned to the promotion appear in the list.

---

**Note:** You can also select categories from the Entire Hierarchy list if they have not been previously assigned. Adding a category in this way will cause it to appear on the Categories window and Assigned Categories list in the Merchandise Selector.

---

4. Add the category to a position on the vehicle page.
  - Drag the category to a row if in list view.
  - Drag the category to a position if in layout view.
  - Drag the category to the bar at the bottom of the window if the template dynamically assigns the positions.

**Figure 5–34 Drag Category Here Bar**

---

» Drag a Category here to add a position.

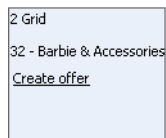
---

To assign offers to a vehicle

1. Click the page number in the # column. The page details open.
2. Open the Merchandise Selector.
3. Select Offers from the Show field. Two types of offers appear
  - Positioned - Offers already assigned to a position in the vehicle.
  - Unpositioned - Offers not yet positioned in the vehicle.
4. Drag the offer to a position on the vehicle page. The category assigned to the position must be a parent of the items on the offer.

To create an offer from the vehicle design window

1. Click the page number in the # column. The page details open.
2. Identify the category the offer is for.



3. Click **Create Offer** in the Offer Name field in list view or the vehicle position in layout view. The Offer Details window opens.
4. Follow the Add an Offer procedure in the Offers section of this chapter. The offer will appear on the Offers window and Offers section of the Merchandise Selector after it is added.

## Workflow

Use the configurable workflow window to support multi-phase event lifecycles including milestones and tasks. Track the progress of an event through its phases, tasks, and milestones. Enter expected start and end dates for a workflow event, and then compare to actual completion dates for analysis. Standard phases include:

- Created
- Planning
- Running
- Completed

Tasks and milestones can be added as part of any phase.

Start and End dates are highlighted in red if the planned date is past due. Start dates are italicized if the phase has not been started. End dates are italicized if the phase is not complete.

To add a task to the workflow

1. Select the Workflow tab from Promotion Manager. The Workflow window opens.



**Figure 5–35 Promotion Manager Workflow Window**

Promotion Manager

Toy Mania Circular - 03/25/2007 - 03/31/2007 Planning Export Save Close

Summary Vendor Deals Categories Offers Vehicle Design **Workflow**

Add Delete Start Complete Approve Deny

Type	Name	Phase Status	WF Status	Start Date	End Date	My Task	Assigned To	Priority
Created		Complete	Complete	09/07/2006	09/25/2006	<input type="checkbox"/>		
Marketing Approval		Complete	Complete	09/07/2006	09/19/2006	<input type="checkbox"/>	Calhoun S.	Medium
Space Allocation Meeting		Complete	Complete		09/25/2006	<input type="checkbox"/>		
Planning		Started	Started	09/25/2006	11/15/2007	<input type="checkbox"/>		
Present Initial Plan to merchandising		Complete	Complete	09/25/2006	09/25/2006	<input checked="" type="checkbox"/>	Smith A.	Medium
Item and Offer Selection		Not Started	Not Started	10/03/2006	10/13/2006	<input type="checkbox"/>	Bosworth N.	Medium
Layout Review		Not Started	Not Started		11/15/2007	<input type="checkbox"/>		
Ad Plan Approval		Not Started	Not Started	12/04/2006	12/15/2006	<input type="checkbox"/>	Calhoun S.	High
1st Proof Review		Not Started	Not Started		03/12/2007	<input type="checkbox"/>		
Forecast Signoff		Not Started	Not Started	03/12/2007	03/14/2007	<input type="checkbox"/>	Hashimoto B.	High
Art Hand-Off		Not Started	Not Started		03/19/2007	<input type="checkbox"/>		
Running		Not Started	Not Started			<input type="checkbox"/>		
Completed		Not Started	Not Started		06/07/2007	<input type="checkbox"/>		
Event Post-Mortem		Not Started	Not Started		06/07/2007	<input type="checkbox"/>		

2. Click Add.
3. Select task. The Task Details window opens.

**Figure 5–36 Task Details Window**

Task Details

sp\_verify

Phase: Created Name:

Description:

Priority: Low ☐ Approval Task

Planned Date:  Start:  End:

Actual Date:  Start:  End:

☐ Complete

Notes:

Assignments

Add

Name	Status	Start	End	Note

OK Cancel

4. Select the phase that the task is a part of from the Phase field.
5. Enter a name for the task in the Name field.
6. Enter details of the task in the Description field.
7. Select the priority of the task from the Priority field.
8. Select Approval Task if the task is an approval task.
9. Enter when the task should begin in the Planned Date - Start field.
10. Enter when the task should be complete by in the Planned Date - End field.
11. Enter additional descriptive or instructive information in the Notes field.
12. Assign the task to users.
  - a. Click **Edit** from the Assignments table. The Users Search window opens.

**Figure 5–37 Users Search Window**

- b. Limit the search.
    - Last Name - Enter all or part of a last name.
    - First Name - Enter all or part of a first name.
  - c. Click **Search**. The users matching the search criteria appear in the Available Users list.
  - d. Select the necessary subsets from the Available list.
  - e. Click the right arrow to move the users to the Selected list.  
Click the double right arrow to move all the users to the Selected list.
  - f. Click **OK**. The users are assigned to the task.
13. Click **OK**. The task is added to the workflow.

To add a milestone to the workflow

1. Click **Add**.
2. Select milestone. The Milestone Details window opens.

**Figure 5–38 Milestone Details Window**

**Milestone Details**

**New Promotion**

Phase: Created

Name:

Description:

Planned End Date:

Actual End Date:

☐ Complete

Notes:

OK Cancel

3. Select the phase that the milestone is a part of from the Phase field.
4. Enter a name for the milestone in the Name field.
5. Enter details of the milestone in the Description field.
6. Enter when the milestone should be achieved by in the Planned End Date field.
7. Select Complete or enter the actual end date in the Actual End Date field if this milestone has been achieved.
8. Enter additional descriptive or instructive information in the Notes field.
9. Click **OK**. The Milestone is added to the workflow.

To edit phase details

1. Click the name of the phase in the Name column. The Phase Details window opens.

**Figure 5–39 Phase Details Window**

**Phase Details**

**New Promotion**

Phase: Created

Name: Created

Phase Status:

Start: End:

Planned Date:

Start: End:

Actual Date:

☐ Complete

OK Cancel

2. Change the name of the phase in the Name field.
3. Select the progress of the phase by selecting it from the Phase Status field.

---

**Note:** Use the red, yellow, or green (traffic light) status indicators to alert yourself or other users to potential problems with a promotion phase.

---

4. Enter the Actual Start Date if the phase has started.
5. Enter the Actual End Date, or select Complete if the phase is done

To remove a task or milestone from the workflow

1. Select the task or milestone.
2. Click **Delete**. The task or milestone is removed.

---

**Note:** Phases cannot be deleted.

---

### Starting Phases or Tasks

Only certain users have permission to start phases, or create tasks and milestones. If you create a task, you or the user assigned to the task can start it. A phase cannot be started until the subsequent phase has been completed.

To start a phase or task

1. Click the name of the phase or task in the Name column. The Details window opens.
2. Enter a date in the Actual Date - Start field.
3. Click **OK**.

To begin a task assigned to you

1. Select the task from the workflow window.
2. Click **Start**. The My Task Status window opens.

**Figure 5–40** *My Task Status Window*

My Task Status

dates 2

Phase Created

Name Task 1

Description Complete Task 1

Priority Low

---

Start End

Actual Date 09/12/2006

☐ Complete

Note

OK Cancel

3. Enter the date you began the task in the Actual Date - Start field, or leave it as the current date if you started today.
4. Click **OK**. The status of the task changes to Started.

### Completing phases, tasks, or milestones

Phases and tasks can be marked as complete by the creator of the task, or the user assigned to it. Milestones are only completed or achieved. You do not start milestones. Milestones are marked as complete by the creator.

To complete a phase or task

1. Click the name of the phase or task in the Name column. The Details window opens.
2. Enter the date the phase or task was finished in the Actual Date - End field, or select Complete if the actual end date is today.
3. Click **OK**.

To complete an assigned task

1. Select the task from the Workflow window.
2. Click **Complete**. The My Task Status window opens.
3. Enter a date in the Actual End Date field, or select Complete if the actual end date is today.
4. Enter additional descriptive or instructional information in the Note field.
5. Click **OK**.

To complete a milestone

1. Click the name of the milestone in the Name column. The Details window opens.
2. Enter a date in the Actual End Date field, or select Complete if the actual end date is today.
3. Click **OK**.

### Approval Tasks

Approval tasks are those that require the approval of users with assignments on the task.

To approve a task

1. Select a task.
2. Click **Approve**. The My Task Approval window opens.

**Figure 5–41 My Task Approval Window**

The screenshot shows a window titled "My Task Approval". Inside, there's a section labeled "dates 2" with the following details: Phase: Created, Name: Task 1, Description: Complete Task 1, and Priority: Low. Below this, there are two radio buttons: "Approve" (which is selected) and "Deny". At the bottom, there is a "Note" field with a text area and "OK" and "Cancel" buttons.

3. Select **Approve**.
4. Enter descriptive information about the approval in the Note field.
5. Click **OK**.
6. The status of the task changes to Complete with the current date appearing in the Start and End fields. If there is more than one assigned user on a task, the status will change to Complete after the last user has approved the task.

To deny a task

1. Select a task
2. Click **Deny**. The My Task Approval window opens.

**Figure 5–42 My Task Approval Window**

This screenshot is identical to Figure 5–41, but the "Deny" radio button is selected instead of "Approve".

3. Select **Deny**.
4. Enter descriptive information about the denial in the Note field.
5. Click **OK**. The Task Details window will display a status of Denied in the Assignments section.

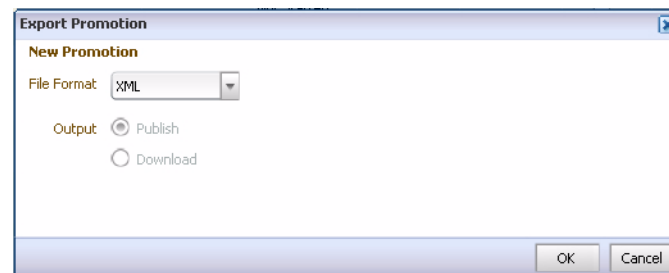
## Export

Use export to create a text or XML file containing the information for the promotion.

To export a promotion

1. Click the name of the promotion in Promotion Manager. The Promotion Details window opens to the right.
2. Click **Open**. The Promotion Manager changes to a tabbed window with the Summary window open.
3. Click **Export**. The Export window opens.

**Figure 5–43** *Export Promotion Window*



4. Select the file format.
  - XML
  - Text
5. Select the Output of the file.
  - Publish
  - Download
6. Click **OK** to export the file.





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# Glossary

**Affinity**

The tendency for the promotion of certain items or groups of items to affect the sales of items or groups of items not being promoted.

**Campaign**

The highest level of event in Oracle Retail Promotion Planning and Optimization. A campaign is an event that defines the marketing theme for your promotions.

**Cannibalization**

The tendency for sales to decrease in items or groups of items not on a promotion because the promoted item is chosen instead.

**Event**

Activities relevant to the promotional calendar.

**Forecast**

A calculation of the possible performance of an offer or promotion.

**Offer**

The merchandise being promoted, the type (percent or amount off), and the amount.

**Promotion**

Individual events or advertising you use to drive increased sales.

**Promotion Calendar**

The promotion events planned for a period of time.

**Vehicle**

The method used to promote an item or group of items.

**What-if**

The section in Promotion Planning and Optimization where different offer scenarios can be tested.

**Workflow**

The customizable path taken in the design of a promotion.

