

**Oracle® Retail Promotion Planning and  
Optimization**  
User Guide  
Release 12.0.1

October 2006

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# Contents

<b>Preface .....</b>	<b>v</b>
Audience .....	v
Documentation Accessibility .....	v
Related Documents .....	v
Customer Support .....	vi
Conventions .....	vi
<b>1 Getting Started .....</b>	<b>7</b>
About Oracle Retail Promotion Planning and Optimization .....	7
Features .....	7
Users .....	7
Tasks .....	7
Logging on to Promote .....	8
<b>2 Navigation/Setup .....</b>	<b>11</b>
Calendar .....	11
Calendar Toolbar .....	11
Navigator .....	13
Calendar .....	14
To Do .....	14
Setup .....	16
Documents .....	16
Reports .....	17
Merchandise Selector .....	17
Target Allocation .....	18
Promotion Performance .....	19
<b>3 Templates .....</b>	<b>21</b>
View Templates .....	21
<b>4 Campaigns and Events .....</b>	<b>23</b>
Create Campaign .....	23
Create Event .....	24
<b>5 Promotions .....</b>	<b>25</b>
Create a Promotion .....	25
Open a Promotion .....	26
Promotion Manager .....	26
Summary .....	27
Vendor Deals .....	27
Categories .....	29
Offers .....	30
Vehicle Design .....	36
Workflow .....	41
Export .....	47
<b>Glossary .....</b>	<b>49</b>



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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.

## Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Accessibility standards will continue to evolve over time, and Oracle is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For more information, visit the Oracle Accessibility Program Web site at

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## Related Documents

For more information, see the following documents in the Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Release 12.0.1 documentation:

- Oracle Retail Promotion Intelligence and Promotion Planning and Optimization 12.0.1 Release Notes
- Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Installation Guide
- Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Configuration Guide
- Oracle Retail 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 Sample Dataset 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

Convention	Meaning
<b>boldface</b>	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<pre> ===== <b>Note:</b> This is a note. ===== </pre>	Notes are used to call out information that is important, but not necessarily part of the procedure.
<code>This is a code sample</code>	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.
<a href="#">hyperlink</a>	Hyperlinks provide a method of opening another document or jumping to another location within the document.

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# Getting Started

## About Oracle Retail Promotion Planning and Optimization

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.

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 Promote

### To access promote

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

A screenshot of a login window with a light blue background. It contains two text input fields: "Username:" and "Password:". Below the "Password:" field is a "Login" button.

### Login Window

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.

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**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.

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### 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.



#### To create a new calendar entry

1. Click **New**.
2. Select the type of entry to create:
  - Campaign
  - Event
  - Promotion

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

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#### To view the calendar in a different way

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

**Promotion Manager**

Calendar  New View by: Month Mar 2007 Filter Graphical View | [List View](#)

◀ Mar 2007 ▶

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
25 LX Toys Spring Sale	26	27	28	1 Toy Blowout Campaign	2	3
4 Toy Blowout Campaign	5	6	7	8	9 Backyard Toy Email	10
11 Toy Blowout Campaign Backyard Toy Email	12	13	14	15 Store Opening Sale	16	17
18 Toy Blowout Campaign Store Opening Sale	19	20	21	22	23	24
25 Toy Blowout Campaign Toy Mania Circular	26	27	28	29	30	31

– List View

**Promotion Manager**

Calendar  New  Delete View by: Month Mar 2007 Filter [Graphical View](#) | [List View](#)

◀ Mar 2007 ▶

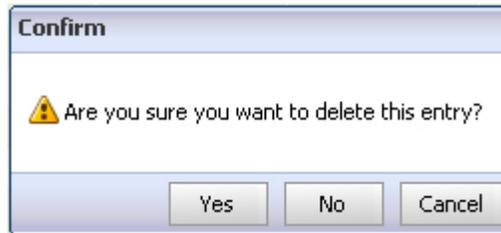
Name	Campaign	Type	Vehicle Type	Status	Start Date	End Date	Phase
<a href="#">LX Toys Spring Sale</a>		Competitor Event			02/24/2007	03/02/2007	
<a href="#">N.J. Store Opening</a>		Company Event			03/14/2007	03/14/2007	
<a href="#">Retail Advertising C</a>		Personal Event			03/09/2007	03/11/2007	
<a href="#">Toy Blowout Campa</a>		Campaign			03/01/2007	03/31/2007	
<a href="#">Backyard Toy Email</a>	Toy Blowout Campa	Promotion	Email	●	03/09/2007	03/11/2007	Created
<a href="#">Store Opening Sale</a>		Promotion	Circular	●	03/14/2007	03/20/2007	Created
<a href="#">Toy Mania Circular</a>	Toy Blowout Campa	Promotion	Circular	●	03/25/2007	03/31/2007	Planning

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

◀ Sep 2006 ▶

To delete an event from list view

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



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

#### **To delete an event from 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

## **Navigator**

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.

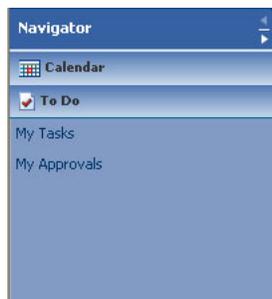


### Navigator Calendar Section

- 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.



### Navigator To Do Section

#### To start and complete your tasks

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







#### Navigator Documents Section

- Select a document to view it in Promotion Manger.

## Reports

The reports section lists the reports configured for access through Promotion Planning and Optimization. See the Oracle Retail Promote Intelligence User Guide for complete information on reports.



#### Navigator Documents Section

## Merchandise Selector

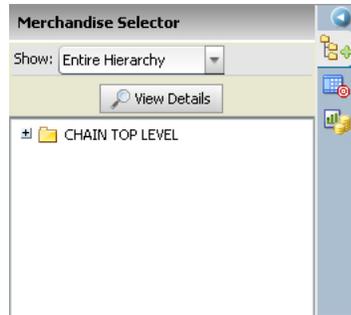
The Merchandise Selector provides a view of the merchandise hierarchy. Use it to view and select merchandise levels, to view assigned categories, or to view or select pre-defined offers to add to a promotion.

#### To use the merchandise Selector

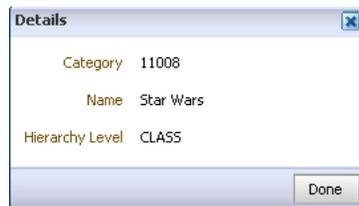
1. Open a promotion. The Merchandise Selector appears to the left of the promotion details window in Promotion Manager.



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



3. Use the merchandise selector for the following tasks.
  - Select an option from the Show 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 of folder.
  - View the details of a folder
    - a. Select the folder
    - b. Click **View Details**. The View Details window opens.



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

Target Allocation		
Category	Target	Actual
32005	0%	

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**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.

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## 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.

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

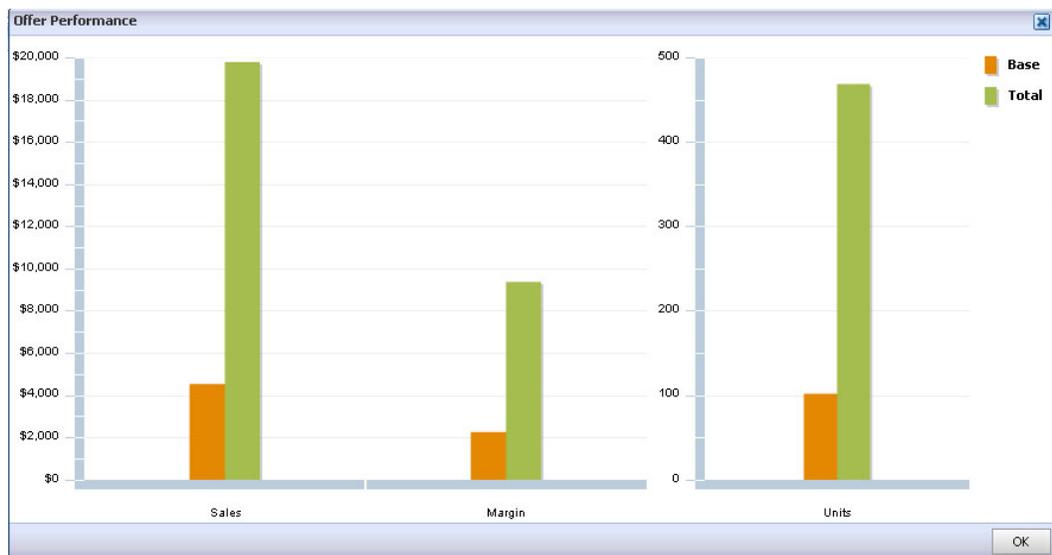
To update the performance metrics for a promotion

- 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.



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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 allow you to use standard layouts for positioning items and categories on pages. A page is a location within a vehicle where an item or items are promoted. For example, it could be the first page of a circular or the front of an in-store display. Page templates should be associated with Vehicle templates.

Vehicle templates allow you to use standardized mediums by which items are promoted. A vehicle contains page templates and should be associated with a promotion template.

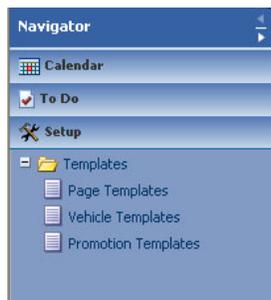
Promotion templates allow you to use standard promotions. A promotion template should contain vehicle templates.

## View Templates

You can view the existing templates from the Setup section of Navigator.

### To view templates

1. Select Setup from Navigator.



2. Expand the Templates folder.
3. Select the type of template:
  - Page - A list of the available page templates appears in Promotion Manager.
  - Vehicle - A list of the available vehicle templates appears in Promotion Manager.
  - Promotion - A list of the available promotion templates appears in Promotion Manager.



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## 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.



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

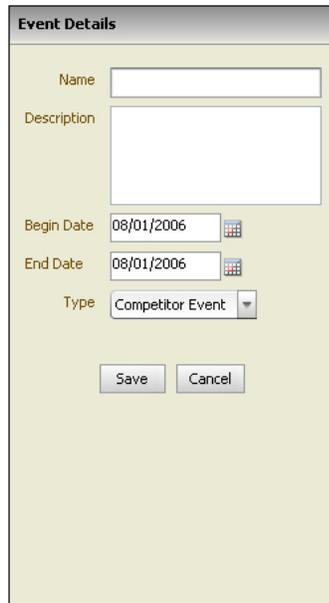
1. Select the **Calendar** section of Navigator
2. Click **Create Campaign**. The Campaign Details window opens.
3. Follow steps 3-7 above to create a new campaign.

## 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.



The screenshot shows the 'Event Details' dialog box. It includes the following fields and controls:

- Name:** A text input field.
- Description:** A larger text area for detailed notes.
- Begin Date:** A date picker set to 08/01/2006.
- End Date:** A date picker set to 08/01/2006.
- Type:** A dropdown menu currently showing 'Competitor Event'.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom.

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.

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## 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.

**Promotion Details**

Name

Description

Begin Date 08/01/2006

End Date 08/01/2006

Campaign

Budget

Template Ad Hoc Promo

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. Only campaigns that are within the begin and end date of the promotion are available.
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 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.

The screenshot shows the 'Promotion Manager' application window. The title bar reads 'Promotion Manager' and the window content shows a tabbed interface with the 'Summary' tab selected. The window title is 'New Promotion - 08/01/2006 - 08/01/2006 Created'. The 'Summary' tab contains the following fields and controls:

- Name:** Text box containing 'New Promotion'.
- Description:** Empty text box.
- Template:** Dropdown menu set to 'Ad Hoc Promo'.
- Begin Date:** Calendar icon and text box containing '08/01/2006'.
- End Date:** Calendar icon and text box containing '08/01/2006'.
- Status:** Dropdown menu.
- Campaign:** Dropdown menu.
- Set:** Dropdown menu.
- Stores:** Dropdown menu.
- Subsets:** Label with no input field.
- Budget Cost:** Text box.
- Actual:** Text box.
- Type:** Dropdown menu.
- Vehicle:** Dropdown menu set to 'Circular'.
- Template:** Dropdown menu set to 'Ad Hoc Circ'.

At the bottom of the window, the following metadata is displayed:

- 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

## 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.

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.

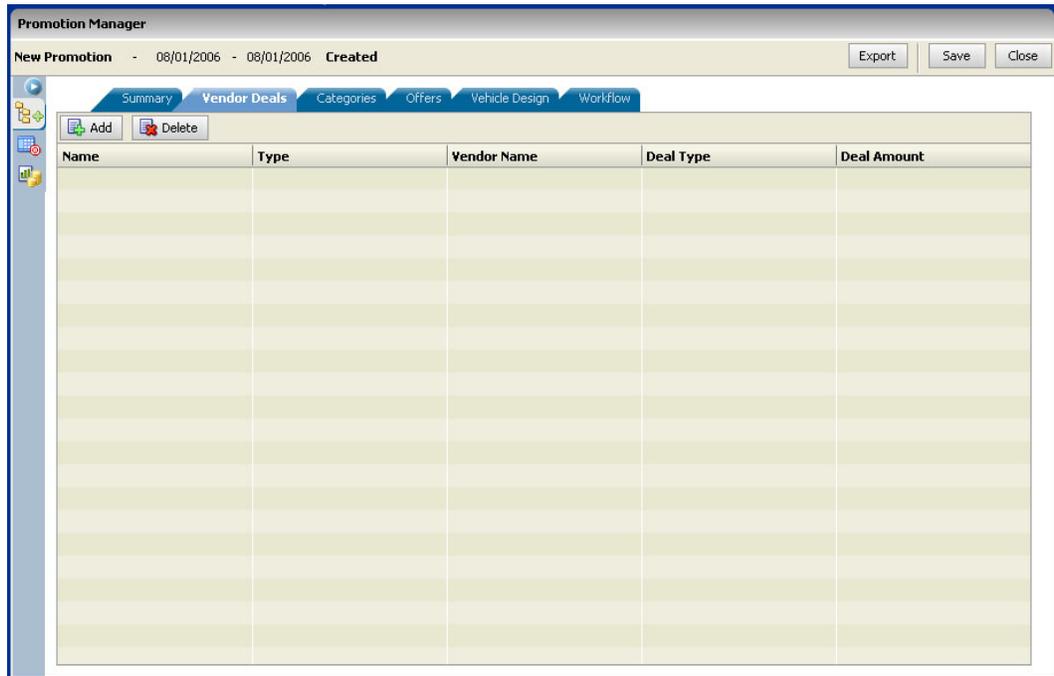
3. Select the set of stores that the promotion will apply to from the Stores field.
4. Select a subset of stores from the Subsets field.
5. Enter the actual cost in the Actual field if it is known.
6. Select the method of promotion from the vehicle field.
7. Select the template to be used for the vehicle from the template field.
8. Click **Save** to update the promotion with the information.
9. 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.



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

4. Select the type of vendor deal:
  - Off Invoice – You receive a percent or amount off a vendor invoice in exchange for promoting specific merchandise on a purchase order.
  - Ad Space – The vendor agrees to pay you a percentage or amount of an advertisement in exchange for something such as front page exposure.
  - Presentation – The vendor agrees to pay you a percentage or amount in exchange for stores presenting merchandise in a specific location such as an end cap.

- Volume Purchase – You or a supplier agree to provide vendor funding for promotions after an agreed upon minimum dollar 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 field next to the Target field.

The screenshot shows a form field labeled 'Target'. To the left of the field is a dropdown menu with 'Category' selected. To the right of the dropdown is an empty text input field.

- Sku
  - Drag an item from the merchandise selector to the field next to the Target field.

The screenshot shows a form field labeled 'Target'. To the left of the field is a dropdown menu with 'Sku' selected. To the right of the dropdown is an empty text input 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
    - a. Enter the minimum volume to receive the deal in the Volume Min field.
    - b. Select if the minimum is Units or Dollars.
    - c. 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 table.

#### 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.

## Add categories to a promotion

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

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.

Drag a Category here to add it to the Category List

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

Target

Name: Action Figures

Target: 0 %

Actual: %

OK Cancel

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

## To add an offer

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

Promotion Manager

sp\_promo1 - 08/18/2006 - 08/25/2006 Planning Complete Save Close

Summary Vendor Deals Categories Offers Vehicle Design Workflow

Add Delete Graph Forecast

Name	Offer	Positioned	Status	Lift %	Base Units	Incr Units	Tot Units	Base Sales	In
Happy Family Grandparents A	\$2.00 off	<input checked="" type="checkbox"/>	Unable To Forecast	0%	0	0	0	\$0.00	\$0
Offer1	\$4.00 off	<input checked="" type="checkbox"/>	Unable To Forecast	0%	0	0	0		
offer1	\$1.00 off	<input type="checkbox"/>	Unable To Forecast	0%	0	0	0		
<b>Promotion Performance</b>			Unable To Forecast	0%	0	0	0	\$0.00	\$0

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

Offer Details

Offer & Performance What-If Position Details

Offer Name  Notes

Offer Type

Offer Amount

Delete Affinity Details Graph Forecast

Item ID	Description	Base Price	Status	Lift %	Base Units	Incr Units	Tot Units	B
<b>Offer Performance</b>			Unable To Forecast	0%	0	0	0	

Drag Merchandise here to add it to this Offer

- 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.

- Select the type of Offer in the Offer Type field.
  - \$ Off – a specific dollar amount off the items on the offer.
  - % Off – a specific percentage off the price of the items on the offer.
- Enter the amount off, or select the percentage off in the Offer Amount field.
- Add any additional descriptive or instructive information to the Notes field.

7. Drag the merchandise to the bar at the bottom of the table. The merchandise is added to the offer.

» Drag Merchandise here to add it to this Offer

8. Close the Offer Details window by clicking the X in the upper-right corner. The offer appears in the list on the Offers window.

**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.

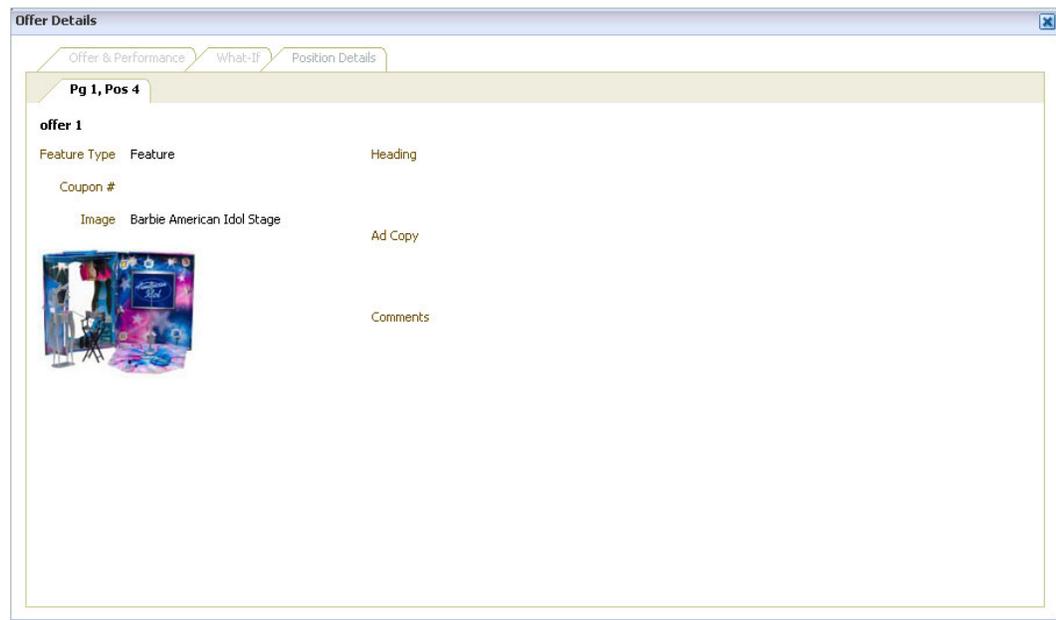
**To delete an offer**

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

**To view 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.



**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.

The screenshot shows the 'Offer Details' window with the 'What-If' tab selected. The window has three main columns: 'Current Offer', 'What-If - 1', and 'What-If - 2'. Each column contains the following fields:

- Offer Name:** New Offer (with a pencil icon)
- Offer Type:** \$ Off (with a dropdown arrow)
- Offer Amount:** \$1.00 (with a text input field)
- Vehicle Type:** Circular (with a pencil icon)
- Other Vehicles:** Add... (with a pencil icon)

Below the columns is a summary table with the following data:

Current Offer	What-If - 1	What-If - 2
Status	Status	Status
Lift % 0	Lift %	Lift %
Base Units 0	Base Units	Base Units
Incr Units 0	Incr Units	Incr Units

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

- Offer Name
  - a. Click the Pencil button next to the name of the offer. The Modify Offer window opens.
  - b. 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.
  - c. 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
  - a. Click the Pencil button next to the vehicle type. The Modify Vehicle window opens.

- b. Select or clear vehicle types.
  - c. 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

### 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 by promoted items instead.

### View affinity details for an item

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

Name	Base Units	Incr Units	Tot Units	Base Sales	Incr Sales	Tot Sales	Base Margin

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

### 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.

Promotion Performance	
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.

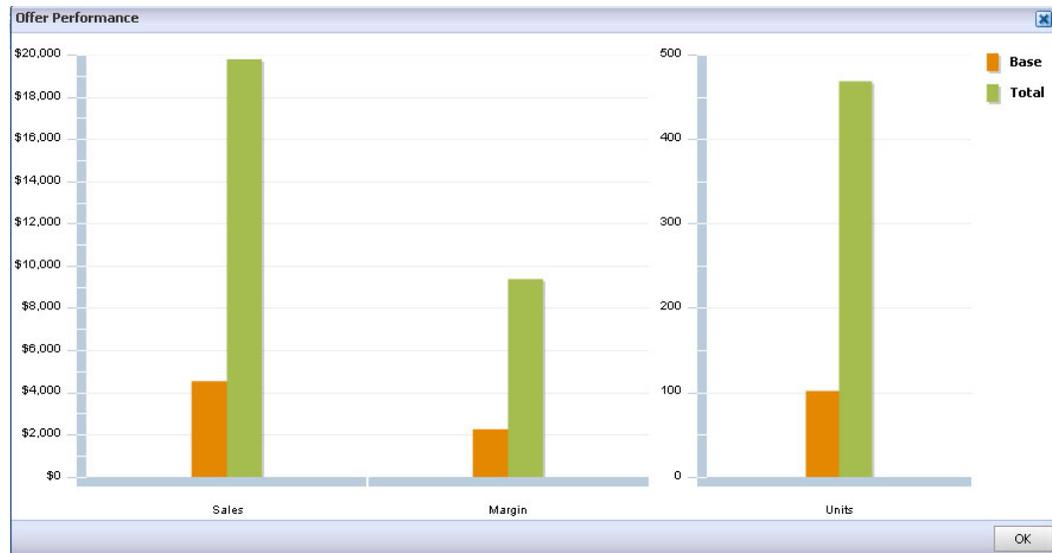
- Out of Date – A forecast is out of date because the offer changed.

## 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.

### 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.



## Vehicle Design

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

A vehicle might be:

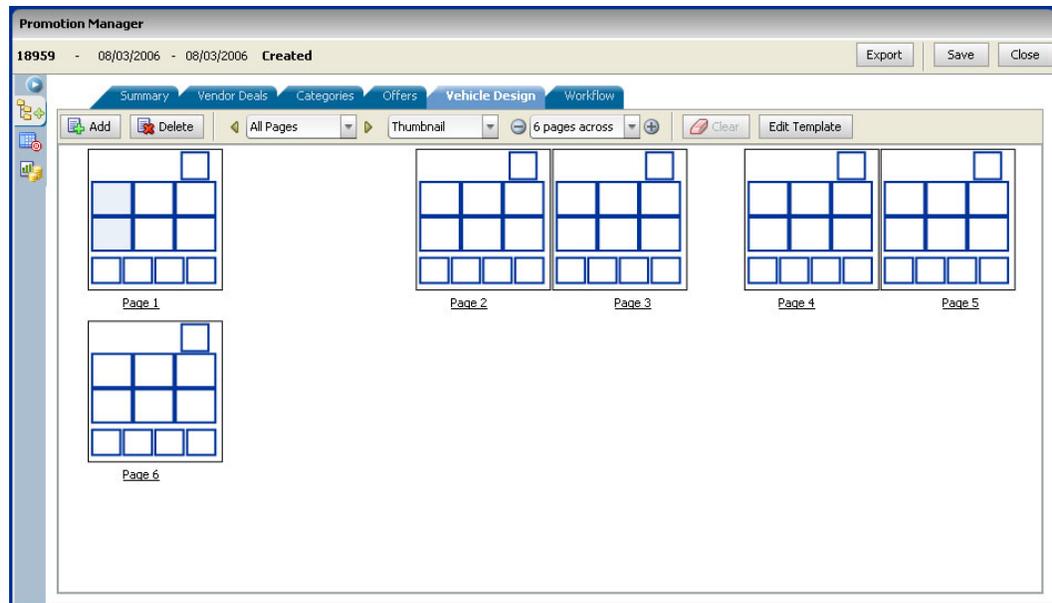
- A circular
- A newspaper ad
- Run of Press (ROP)
- Direct mail
- Email
- An in-store display
- An end cap
- A TV ad

### Vehicle Pages

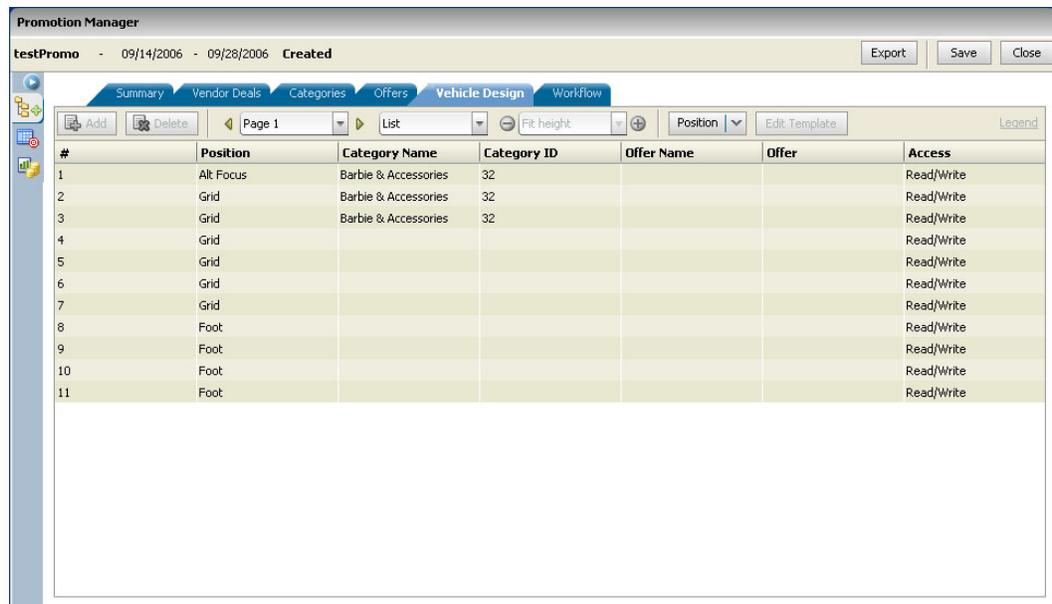
Use the procedures below to view, add, and edit the pages of the promotion vehicle.

#### To view all pages of a vehicle

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

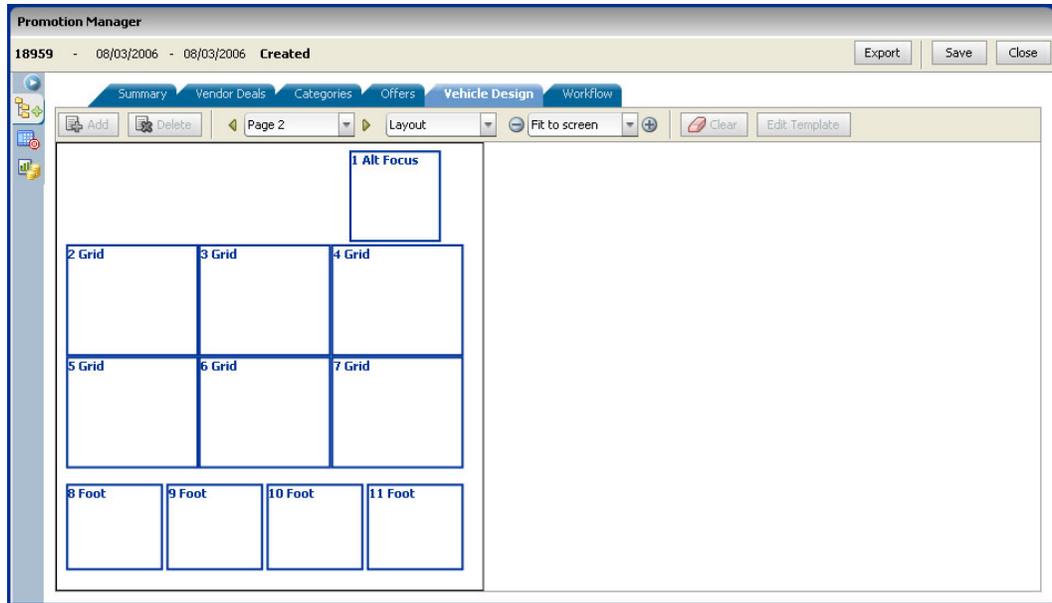


- Select the number of pages across to view.
- Select List. The Vehicle Designer changes to List view.

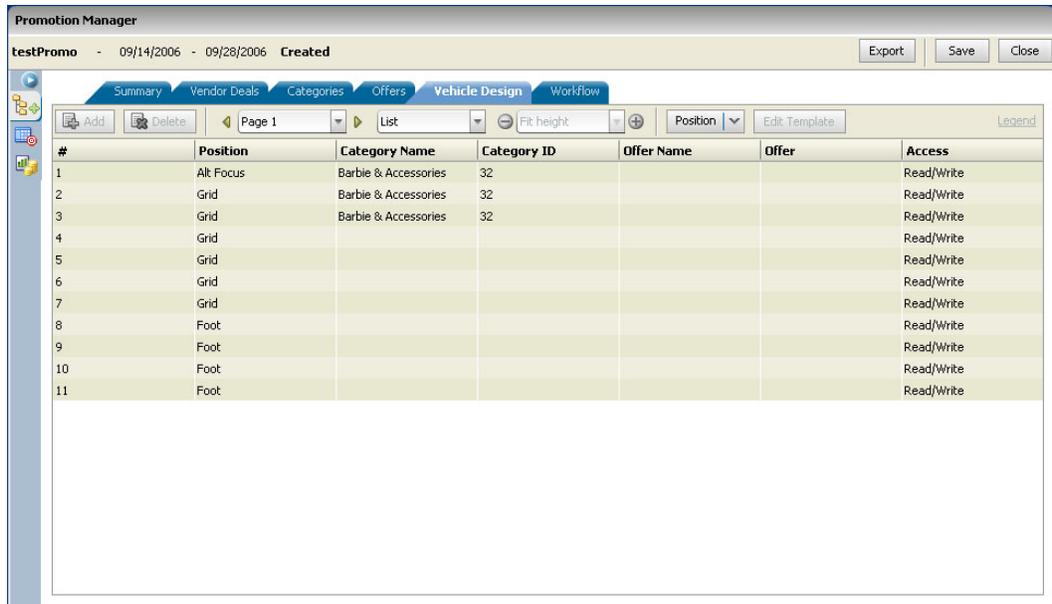


### To select a specific page

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



- Print
- List

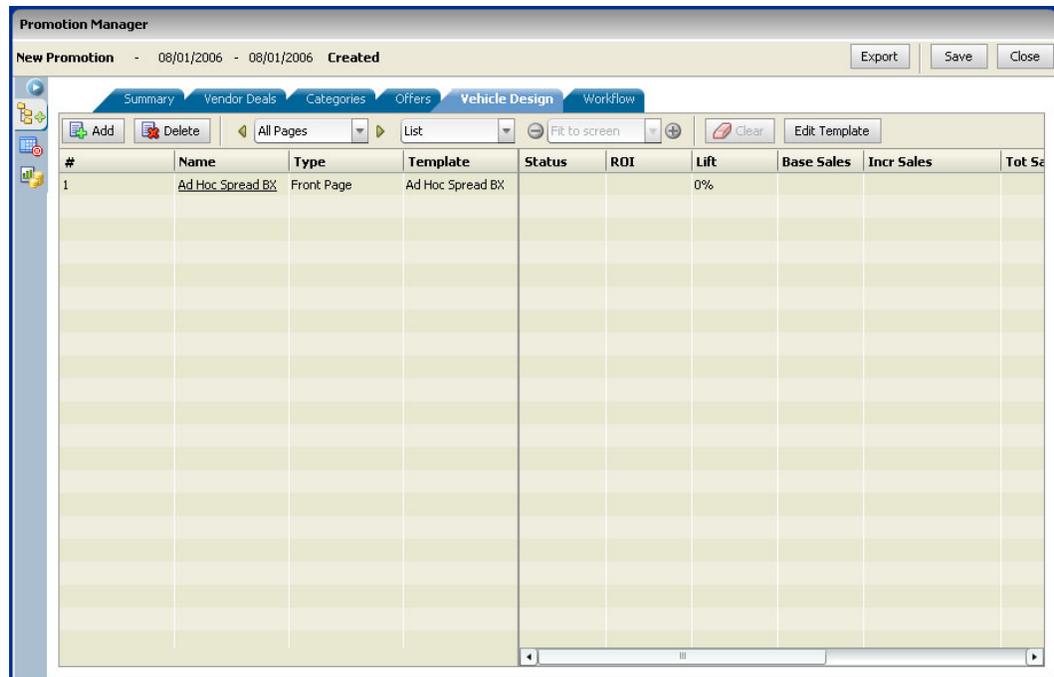


3. Select how to view the Layout or Print view:

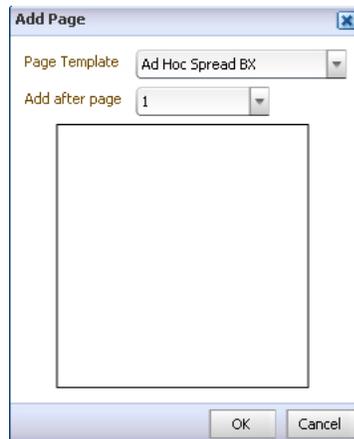
- Fit to Screen
- Fit Width
- Fit Height
- Custom View - Use the + and – buttons to zoom in and out.

Add a page to the promotion vehicle

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



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



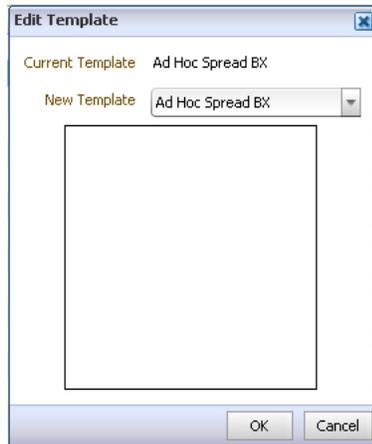
3. Select the template to use for the page from the Page Template field.
4. Select where to add the page to the vehicle from the Add after page field.
5. Click **OK**. The page is added to the vehicle and the details appear on the table of the vehicle design window.

#### 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.



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

» 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 the correct position on the vehicle page.

#### 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 Manger. The Workflow window opens.

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

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

**Task Details**

sp\_verify

Phase: Created (dropdown)      Name: [text box]

Description: [text area]

Priority: Low (dropdown)       Approval Task

Planned Date: [calendar]      End: [calendar]

Actual Date: [calendar]      End: [calendar]

Complete

Notes: [text area]

**Assignments**

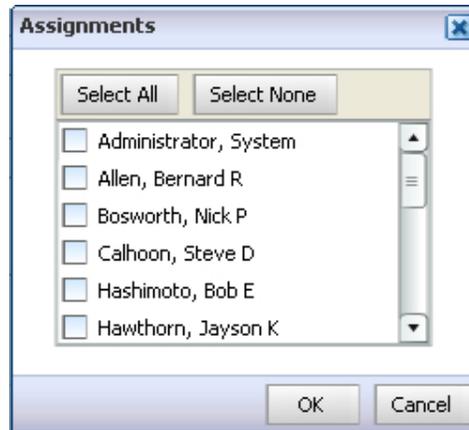
[Add button]

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 Assignments window opens.



- b. Select the users to be assigned to the task.
  - c. Click **OK**.
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.

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.

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 stage 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 start a task assigned to you

1. Select the task from the workflow window.

2. Click **Start**. The My Task Status window opens.

**My Task Status**

dates 2

Phase Created

Name Task 1

Description Complete Task 1

Priority Low

---

Actual Date

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 one or more approvals.

#### To approve a task

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

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.

#### To deny a task

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

The screenshot shows a dialog box titled "My Task Approval". It contains the following information:

- Phase:** Created
- Name:** Task 1
- Description:** Complete Task 1
- Priority:** Low

Below this information, there are two radio buttons:
 

- Approve
- Deny

 At the bottom of the dialog, there is a "Note" field with a text area and "OK" and "Cancel" buttons.

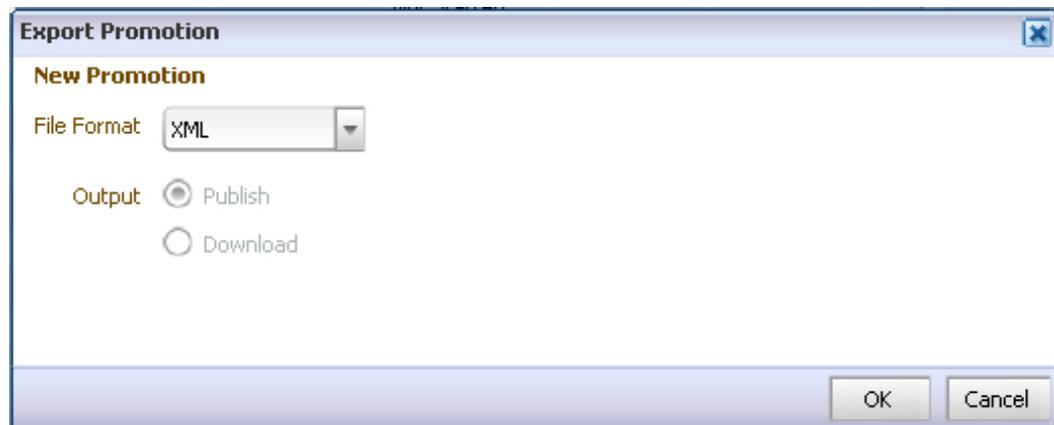
3. Select **Deny**.
4. Enter descriptive information about the denial in the Note field.
5. Click **OK**. The Task Details window will display a status of Denied in the Assignments section.

## 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.



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

---

---

# 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 and 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.