

Oracle® Retail Promotion Intelligence

User Guide

Release 13.2

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Oracle Retail Promotion Intelligence User Guide, Release 13.2

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Your feedback is important, and helps us to best meet your needs as a user of our products. For example:

- Are the implementation steps correct and complete?
- Did you understand the context of the procedures?
- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

If you find any errors or have any other suggestions for improvement, then please tell us your name, the name of the company who has licensed our products, the title and part number of the documentation and the chapter, section, and page number (if available).

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Preface

Oracle Retail Promotion Intelligence User Guide is a complete guide to the use of Promotion Intelligence.

Audience

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

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 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 Promotion Intelligence and Promotion Planning and Optimization Operations Guide*
- *Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Data Model*
- *Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Implementation Guide*
- *Oracle Retail Promotion Planning and Optimization User Guide*
- *Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Licensing Information*

Customer Support

To contact Oracle Customer Support, access My Oracle Support at the following URL:

<https://support.oracle.com>

When contacting Customer Support, please provide the following:

- Product version and program/module name

- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

Review Patch Documentation

When you install the application for the first time, you install either a base release (for example, 13.1) or a later patch release (for example, 13.1.2). If you are installing the base release, additional patch, and bundled hot fix releases, read the documentation for all releases that have occurred since the base release before you begin installation. Documentation for patch and bundled hot fix releases can contain critical information related to the base release, as well as information about code changes since the base release.

Oracle Retail Documentation on the Oracle Technology Network

Documentation is packaged with each Oracle Retail product release. Oracle Retail product documentation is also available on the following Web site:

http://www.oracle.com/technology/documentation/oracle_retail.html

(Data Model documents are not available through Oracle Technology Network. These documents are packaged with released code, or you can obtain them through My Oracle Support.)

Documentation should be available on this Web site within a month after a product release.

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	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.

Measuring Performance

The Promotion Intelligence reports use your product, geography, time hierarchies, market basket data, and a number of other entities to process and report on ad effectiveness. This chapter provides a high-level overview of these entities and how Promotion Intelligence uses them.

The User Interface

The reports in Promotion Intelligence and Promotion Planning and Optimization use MicroStrategy reporting software as the vehicle for defining, scheduling, running, and distributing reports.

The Reports

To provide useful information, the solution offers a catalog of reports that are designed to answer particular business questions. MicroStrategy provides a user interface to the data warehouse and creates the reports that you view via your Web browser.

The Promotion Calc Engine

The Promotion Calc Engine (PCE) software transforms market basket-level data into relational tables for collecting set metrics, frequent-set analyses, item-combination confidence, customer clusters, and other advanced analytic output. The PCE can process large volumes of data quickly and can deliver unique business analysis metrics to the retail industry.

Together, the PCE components provide the capability to take transaction source data and process it to create analytic result sets, which are then exported to the data warehouse. Next, descriptions of the data structures for the analytic results are incorporated into Promotion Intelligence metadata. The user then can query the analytic result data to generate reports that contain market basket analysis tools, such as correlation matrixes and purchase pattern clusters.

The Data Warehouse

The data warehouse stores all the useful data collected from your company's market baskets, the results sets from the PCE's analytic processing, information about promotion history, and product, geography, and time (PGT) hierarchies - information that is necessary to this analysis. The next section provides more information about the data that the reports require.

Data Required for Reporting

Market Basket Data

Retailers collect details about every market basket. Some of these details are the number of items purchased, the advertised and unadvertised items included in the market basket, item prices, total market basket amount, and date of purchase. These and many other details provide valuable information for the analytic machine. Promotion Intelligence associates certain derived information with each market basket. The system determines these measurements, or metrics, using your company's business rules and associated data. Some sample metrics derived from each market basket might be:

- Average Sales Amount
- Average Margin Amount
- Average Number of Unique Items
- Average Number of Items Sold

Hierarchy and Attribute Data

The application analyzes data by examining its various dimensions, such as product, geography, and time (PGT). Each dimension has a number of attributes that describe it.

For instance, the product dimension might include the attributes department and the time dimension might include the attribute week. The attributes of a dimension define the hierarchy or structure of the dimension.

Product Data Every product belongs to some sort of product hierarchy. The different levels of the hierarchy are attributes of the product. For example, one company might stock and sell about 120,000 products, organized in the following hierarchy:

Table 1–1 Sample Product Hierarchy

Data Model Term	Company Term	Contains
Product Level 3	Division	5 Division
Product Level 4	Sub-Division	50 Sub Divisions
Product Level 5	Department	200 Departments
Product Level 6	Category	1000 Categories
Product 7	SKU/UPC	120,000 SKUs/UPCs

Regardless of the terms used, every company structures its data in a general to specific hierarchy. The structure goes from a broad, general level such as hard and soft goods, to a narrow, specific level that identifies items such as a 6-pack of soda. A company's product dimension also might include these non-hierarchical attributes:

- Product Description
- Discontinue Date
- Average Cost
- Brand

- Company Location Cost

Non-hierarchical product attributes for another retailer might be:

- Inventory Indicator
- Vendor Name
- Item Status
- Vendor Number
- Buyer
- Hazardous Materials

Geography Dimension Every store belongs to a geography hierarchy. The different levels of the hierarchy are attributes of the store. For example, one company might have a total of 1000 stores organized in the following hierarchy:

Table 1–2 Example Store Hierarchy

Level	Number
Country	1
Region	5
Area	25
District	100
Store	1000

Again, regardless of the terms used, every company structures its data in a general to specific hierarchy. The data begins at a general level such as the Southwestern United States and goes to a specific level that identifies a specific store. A company's geography dimension might include non-hierarchical attributes such as climate zone, neighborhood demographics, etc.

Time Dimension Usually a retailer's time attributes are determined by their promotion schedules. For instance, a retailer who runs sales from Monday to Friday might have a time attribute called Promo Week and another called Calendar Week. Many retailers also include time attributes for fiscal periods.

Note: Seasonality is one aspect of the time dimension that has special impact on some reports. In particular, product affinity analysis is sensitive to the range of dates selected. If the range is too great (over a period of a year), retailers who deal in seasonal goods discover that market baskets are too varied to allow identification of accurate product affinities or clusters. In these cases, a maximum range of two to three months is recommended.

Ad Events and Promotion History Information about ad events, their versions, and their history is also necessary to support the Promotion Intelligence reports. The ad event is a scheduled period of time that the retailer identifies for the purpose of promotions. For example, one company might schedule 52 weekly ad events in a year, but special event promotions might occur and overlap with the weekly events.

Report Results

Metrics

Based on the data, described above, Promotion Intelligence calculates metrics for the attributes that you include in the report definition and then displays the results in the columns of the report. The column headings indicate the metrics that are displayed.

Metric Column Names

Although each report has standard, default metrics, metric column names can vary among customers. Systems administrators can modify column names in order to maintain the terminology that your company uses. In addition, the user interface allows you to change the way the reports display. You can select a different color scheme, rearrange the columns, and switch columns and rows, using the selections available in the interface. See [Display Options for Completed Reports](#) on page 2-6 for more details.

Not all metrics are available in every report type. For these reasons, the sample report information provided in this book may not look exactly like the information you see in your own reports. Shorter metric names (alias) frequently appear in the column and row headings of the actual reports. For example, ordinal numbers usually are shortened (first becomes 1st), and readily understood symbols are used (# for number, \$ for dollars, % for percent). For a list of standard metrics and abbreviations, see [Chapter 4, "Metric Abbreviations"](#).

Format

Some standard formats apply to Promotion Intelligence reports.

- All date and time attributes display according to the regional settings the user selects.
- All numbers display with a separator between hundreds and thousands. The separator is specific to the regional setting.
- Two decimal places display for currency or average currency, average quantities, and percents.

Templates

The report template provides the structure or format for the display of attributes and metrics contained in the report. Promotion Intelligence provides you with two options for modifying the report structure. One option is the Report Builder. It provides a fully prompted report that you can use as a template for other reports. The other option is the Report Wizard. It allows you to create new reports by selecting a combination of existing templates and filters.

Groupings, Prompts, Attributes, and Page-bys

Every Promotion Intelligence report presents a specific group of types of information. These types of information include the prompts, page-by options, and attributes that display in the completed report. For instance, facts about ad events, products, ad versions, and items are grouped together in the Promotion Scorecard report. These are the facts that are pertinent to this report. Other reports feature different combinations of facts. Prompts enable you to further narrow the amount of data that Promotion Intelligence returns in a single report. They can reduce report processing time and yield more useful information about your specific concern. You select these parameters

in the report prompts page and in most cases, this selection is optional. Page-by options, in some reports, also limit the amount of data you view on one screen, and attributes are the terms that display on the left side of each row of metrics in the completed report.

Getting Started

This chapter describes how to view, filter, print, save, and create new reports within Promotion Intelligence using the MicroStrategy User Interface.

Note: For additional instructions regarding the use of Microstrategy, refer to the Microstrategy product documentation.

Accessing Promotion Intelligence

Promotion Intelligence reports are accessible through your Web browser. To access Promotion Intelligence:

1. Enter the URL for Promotion Intelligence.
2. Login. Enter your username and password in the appropriate fields.
3. Click **Login**. The Promotion Intelligence home page opens.

The Reporting Home Page

The Promotion Intelligence home page provides the following options:

- **Shared Reports**—browse a list of prepared reports available to all users. See [Available Reports](#) on page 2-2 for more information.
- **My Reports**—view reports you previously created and saved.
- **Create Reports**—create and publish a new report. This option is available if you have permissions to create reports. See [Creating New Reports](#) on page 2-7.
- **My Subscriptions**—use the subscriptions feature to receive the latest versions of specific reports. Refer to the Microstrategy online help for more information.
- **History List**—view an up to date summary of the status of your report requests.
- **Preferences**—alter the general setting for displaying reports and access formatting options for other features. See [Other Display Options](#) on page 2-7.
- **Search**—search for reports and other documents using this feature.
- **Help**—access help with the Microstrategy interface.
- **Logout**—exit Promotion Intelligence.

Promotion Intelligence Reports

The following sections provide summary information about available report types and instructions on how to generate these reports.

Available Reports

From the Promotion Intelligence home page, select **Shared Reports**. The reports are contained within three folders as follows:

- **Administrative**—this folder contains the following reports:
 - Audit Trail—this report tracks changes made to a promotion at the user, date/time, and offer level. For more information, see the [Audit Trail Report](#) on page 3-41.
 - Overlapping SKUs—this report identifies cases where the same SKU exists in different offers in the same event. For more information, see the [Overlapping SKUs](#) on page 3-36.
 - Forecast Exception—this report provides information about changes in an offer's total forecast units. For more information, see the [Forecast Exception Report](#) on page 3-42.
- **Business Reports**—this folder contains the following reports:
 - Affinity —this report provides information about the affinity products or items that tend to sell with other items. For more information, see the [Affinity Report](#) on page 3-37.
 - Affinity(Pull)—this report provides information about the affinity products or items that tend to sell well with other items over a long period of time. For more information, see the [Affinity \(Pull\)](#) on page 3-39.
 - Event Scorecard by Item —this report provides an analysis of the effect that individual items have on the success of particular events. For more information, see the [Event Scorecard By Item Report](#) on page 3-1.
 - Event Scorecard by Offer/Dept —this report provides an analysis of the effect that each offer has on the success of particular events. For more information, see the [Event Scorecard By Offer/Dept Report](#) on page 3-6.
 - Event Scorecard by Sub-class —this report provides an analysis of the effect that individual Sub-classes have on the success of particular events. For more information, see the [Event Scorecard By Sub-Class Report](#) on page 3-14.
 - Event Scorecard by Class —this report provides an analysis of the effect that individual classes have on the success of particular events. For more information, see the [Event Scorecard By Class Report](#) on page 3-10.
 - Event Scorecard by Department-Offer Amt—this report provides an analysis of the effectiveness of different offer types and amounts. For more information, see the [Event Scorecard by Department-Offer Amt](#) on page 3-18.
 - Event Scorecard by Class-Offer Amt—this report provides an analysis of the effectiveness of different offer types and amounts. For more information, see the [Event Scorecard by Class-Offer Amt](#) on page 3-23.
 - Event Scorecard by Sub-class-Offer Amt—this report provides an analysis of the effectiveness of different offer types and amounts. For more information, see the [Event Scorecard by Sub-class-Offer Amt](#) on page 3-27.

- Event Scorecard by Sub-class (Event / Weekly Comparison)—this report provides an analysis of the effects that the individual Sub-classes have on the success of specific events. For more information, see the [Event Scorecard by Sub-class \(Event / Weekly Comparison\) Report](#) on page 3-32.
- Forecast Accuracy Report—this report provides a data comparison between the system calculated forecast and actual sales. For more information, see the [Forecast Accuracy Report](#) on page 3-43.
- Strategic Business Emphasis—this report provides a sales and profit analysis of all groups within a given merchandise hierarchy level. It is typically run at the department level. For more information, see the [Strategic Business Emphasis Report](#) on page 3-44.

Generating Reports

After selecting one of the reports in the previous section, your next step is to select your report criteria using available filters.

Within each report, complete the following steps:

1. View the report workflow. The required steps for generating the report are outlined on the left side of the screen. Required fields are indicated in red font.
2. Define filters for the report. Use the left and right arrows to move a filter into the selected block.
3. To generate the report, select **Run Report**. The report status window appears while the report processes.
4. During processing, you can complete one of the following actions:
 - Check the status of your report request.
 - Add the request status to your history list.
 - Cancel the report request.
5. Once processing is complete, the report is displayed. The report appears in table view.

Note: Some reports require that you select or filter the data, for example, by date range or other constraint. Other reports offer filters as options but do not require filters. For these reports, submit the report request without limits or constraints, and the reports will return results on all available categories. If you do not filter the data, the report processing time may increase.

Printing, Exporting, and Saving Reports

Once reports are generated, options are also available to print, export, and save.

Printing Reports

Use the following steps to print a completed report.

1. From the toolbar, select **File—Print** or click the print icon. The **Print Options** window opens.

Figure 2–1 Print Options Window

Print options

Event Scorecard by Dept-Offer Amt

Print: Whole report

Header and Footer:
Edit Custom Settings

Scaling:
☒ Adjust font to 100 % of original size
☐ Fit to: 1 page(s) wide by 1 tall

Orientation:
☒ Portrait
☐ Landscape

☐ Print cover page with filter details

Show advanced options

☐ Do not prompt me again. Show Printable Version

2. Select your desired print options.
3. Click **Show Printable Version**. The window opens and displays the report as it will appear in printed form.
4. From the printable version window, select the print icon.
5. Click **OK** to print the report.

Exporting Report Results

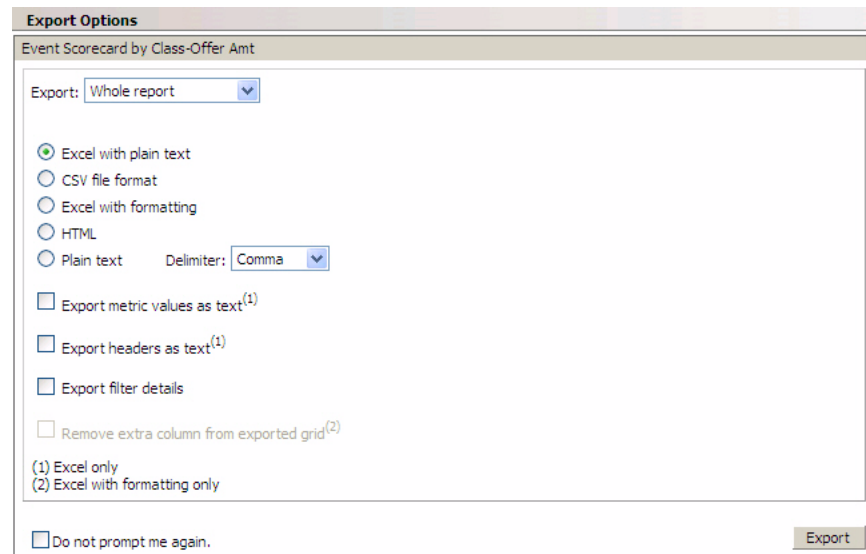
To make report results available to other applications, use the export option. To export a completed report:

1. Click the export icon from the Microstrategy Toolbar.

Figure 2–2 The Export Icon



2. The **Export Options** window opens.

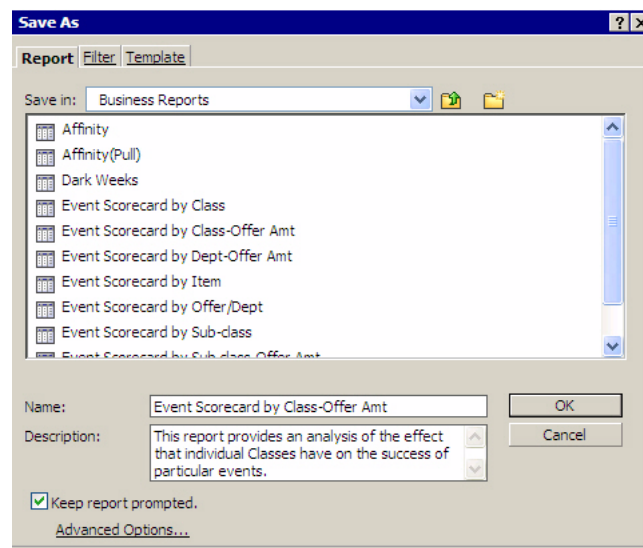
Figure 2–3 Export Options Window

3. Select your desired export options.
4. Click **Export**.

Saving Reports

To save a completed report:

1. Click the save icon. The **Save As** window opens.

Figure 2–4 Save As Window

2. **Save in**—select a location to save your report. Use either the existing folder locations or create a new folder.
 - To create a new folder, select the new folder icon.

3. **Name**—enter a name for the report. The standard report name is the default name of the report (e.g. Event Scorecard by Class-Offer Amt). Enter a new report name if desired.
4. **Description**—enter a description of the report. The standard report definition is the default definition of the report.
5. **Keep Report Prompted**—select this checkbox if you want to retain the filtering options you used when creating the report. Use Advanced Options to specify additional options.
6. Click **Ok**.

Display Options for Completed Reports

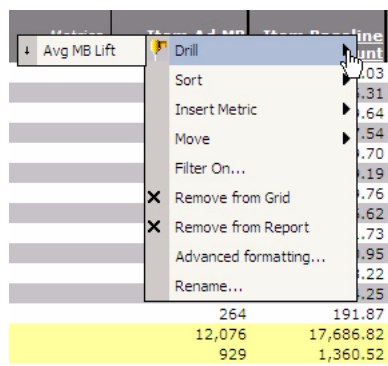
The following sections provide information about display options for completed reports such as drilling into report details, applying filters, and accessing other display options.

Drilling into Report Data

Report metrics that appear as hyperlinks are enabled for additional drilling of data. To drill into report data:

1. Locate a hyperlinked report metric. Right-click onto the metric. A small menu appears within the report as follows:

Figure 2–5 *Drilling Into a Report Metric*



Note: The hyperlinks indicate drill pathways inserted by your administrator for simple drilling.

2. Select an option from the Drill menu within the popup.
3. The report redisplay according to the selected drill option.

Applying Additional Filters

After a report is generated, you have the option of applying additional filters to it. To apply additional filters to a report:

1. From the **Data** menu, select **Filter on Selections**.
2. Select the checkbox beside the elements you want to keep.

3. Click **Apply**.
4. The report redisplay according to the additional filters you specified.

Other Display Options

The Preferences option, available from the main menu, provides options for modifying reports, including options for display, drilling, and user preferences. Options available from the Preferences menu are as follows:

- Change project defaults.
- Change the grid display.
- Change the graph display.
- Select print options.
- Select export options.
- Change the drill mode.
- Change the prompts display.
- Change logout and logon options.
- Change your password.

Creating New Reports

In addition to the standard reports available in Promotion Intelligence, you can design new reports from existing templates and filters or you can create your own templates and use them with existing filters.

This section discusses two options for creating reports: the Report Wizard and the Report Builder.

Note: To create new reports, you must have the appropriate permission as assigned by your System Administrator.

Using the Report Builder

Use the Report Builder to create new report formats.

1. From the Promotion Intelligence home page, select **Create Report**.
2. Select **Report Builder**.
3. **Choose the Attributes of the Report**—(required). Select at least one attribute from the list of Available attributes.
 - Click once onto the desired attribute to highlight it.
 - Click the right arrow to move it to the Selected block.

Note: The only required selection in the Report Builder is Attribute. The selection of metric filters, attribute filters, and metric qualifier filters is optional. However, if you do not select a filter from each available category, the volume of data returned might be very large and processing time might be lengthy.

4. **Choose the Metrics of the Report**—(optional). Select one or more metrics from the list of Available metrics.
 - Click once onto the desired metric to highlight it.
 - Click the right arrow to move it to the Selected block.
5. **Qualify on any Attribute**—(optional). Select attributes from the list of Available attributes.
 - Click once onto the desired attribute to highlight it.
 - Click the right arrow to move it to the Selected block.
6. **Qualify on any Metric**—(optional). Select metrics from the list of Available metrics.
 - Click once onto the desired metric to highlight it.
 - Click the right arrow to move it to the Selected block.
7. Click **Run Report**.

Using the Report Wizard

Use the Report Wizard to create a report using existing templates and filters.

1. From the Promotion Intelligence home page, select **Create Report**.
2. Select **Report Wizard**.
3. **Choose a Template**—(required). Select a template from the list of available templates.
 - Scroll through the list of available templates.
 - Highlight one template.
 - Click the right arrow to move the template name into the Selected block.

Note: You cannot select more than one template.

4. **Choose a Filter**—(required). Select a filter from the list of available filters.
 - Scroll through the list of available filters.
 - Highlight one or more filters.
 - Click the right arrow to move each filter name into the Selected block.
5. Click **Save Report**. When processing is complete, the report results will display.

Reports on Individual Products

Use Promotion Intelligence reports to evaluate the performance of individual products in your ad events or for a specific period of time.

This chapter contains the following reports:

- [Event Scorecard By Item Report](#) on page 3-1.
- [Event Scorecard By Offer/Dept Report](#) on page 3-6.
- [Event Scorecard By Class Report](#) on page 3-10.
- [Event Scorecard By Sub-Class Report](#) on page 3-14.
- [Event Scorecard by Department-Offer Amt](#) on page 3-18.
- [Event Scorecard by Class-Offer Amt](#) on page 3-23.
- [Event Scorecard by Sub-class-Offer Amt](#) on page 3-27.
- [Event Scorecard by Sub-class \(Event / Weekly Comparison\) Report](#) on page 3-32.
- [Overlapping SKUs](#) on page 3-36.
- [Affinity Report](#) on page 3-37.
- [Affinity \(Pull\)](#) on page 3-39.
- [Audit Trail Report](#) on page 3-41.
- [Forecast Exception Report](#) on page 3-42.
- [Forecast Accuracy Report](#) on page 3-43.
- [Strategic Business Emphasis Report](#) on page 3-44.

Report Formats

Promotion Intelligence reports are displayed in a table format. The actual reports that display on your computer monitor feature the colors and fonts that are appropriate to the product's graphic user interface.

Event Scorecard By Item Report

Business Value

This report provides an analysis of the effect that individual items have on the success of particular events.

Report Prompts and Display

Select from the following options to create an Event Scorecard by Item Report:

1. **Event**—(required). Select an event.
2. **Merchandise Hierarchy**—(optional). Select an attribute from the Merchandise Hierarchy.
3. Click **Run Report** to create the report.

Table 3–1 Event Scorecard by Item Report Metrics

Metric Number	Metric	Notes
1	Event	Event name that represents a group of promotions such as versions of a single ad.
2	Start Date	Start date of the promotion.
3	Dept	Department id and description of dept shown in 2 separate columns.
4	Class	Class id and description of class shown in 2 separate columns.
5	SubClass	SubClass id and description of Sub-Class shown in 2 separate columns.
6	Ad Item	Description and id of item on promo.
7	Position	Page number, position number.
8	Offer	Offer Name.
9	Item Ad MB Count	Count of ad transactions that contain at least one unit of the ad item.
10	Item Baseline MB Count	*Applicable to SKU-level only. Estimated count of baseline transactions that contain the ad item during the ad event period.
11	Incr Item MB Count	*Applicable to SKU-level only. Additional number of transactions that contain the ad item result of the promotion compared with the estimated baseline count. [Item Ad MB Count - Item Baseline MB Count]
12	Item MB Count Lift%	Count of item ad transactions compared to estimated baseline transactions. Percentage change in MB count over baseline due to ad event. [Incr Item MB Count / Item Baseline MB Count] * 100
13	Total Incr Sales	Additional sales during ad event of the ad item plus additional non-ad sales allocated to the ad item compared to estimated baseline sales.
14	Incr Sales Lift%	[(Total Incr Sales / Item Baseline Sales + Allocated Non-ad Baseline Sales) * 100]
15	Total Incr GM	Additional profit during ad event of the ad item plus additional profit generated by non-ad items allocated to the ad item compared to estimated baseline profit. Incr Item GM + Incr Allocated Non-ad GM
16	Incr GM Lift%	[(Total Incr Sales / Item Baseline Sales) + Allocated Non-ad Baseline Sales] * 100

Table 3–1 (Cont.) Event Scorecard by Item Report Metrics

Metric Number	Metric	Notes
17	Item Ad Sales	Sales generated by the ad item during the ad event (excluding affinity effects).
18	Item Baseline Sales	Estimated baseline sales generated by the ad item during the ad period.
19	Incr Item Sales	Additional sales generated by the item as a result of the ad event compared with the estimated baseline sales. [Item Ad Sales - Item Baseline Sales]
20	Item Ad Sales Lift%	This metric compares sales by ad item against baseline sales. Percentage change in sales over baseline due to ad event. [Incremental Item Sales / Item Baseline Sales] * 100
21	Allocated Non-ad Affinity Sales	Total non-ad sales (baseline + incremental) allocated to the ad item based on the affinity factors.
22	Allocated Non-ad Revenue Sales	Total non-ad sales (baseline + incremental) allocated to the ad item based on the revenue.
23	Incr Allocated Non-ad Affinity Sales	Additional non-ad sales above baseline allocated to the ad item based on the affinity factors.
24	Incr Allocated Non-ad Revenue Sales	Additional non-ad sales above baseline allocated to the ad item based on the revenue.
25	Total Sales (Ad + Non-ad)	Total sales generated by the item as a result of the ad event including the incremental non-ad sales allocated to the item.
26	Item Ad GM	Profit generated by the ad item during the ad event (excluding affinity effects).
27	Item Baseline GM	Estimated baseline profit generated by the ad item during the ad period.
28	Incr Item GM	Additional profit generated by the ad item as a result of the ad event compared with the baseline.
29	Item Ad GM Lift%	This metric compares ad profit by ad item against baseline profit. Percentage change in profit over baseline due to ad event.
30	Allocated Non-ad Affinity GM	Total non-ad profit (baseline + incremental) allocated to the promo item based on the affinity factors.
31	Allocated Non-ad Revenue GM	Total non-ad profit (baseline + incremental) allocated to the promo item based on the revenue.
32	Incr Allocated Non-Ad Affinity GM	Additional non-ad profit above baseline allocated to the promo item based on the affinity factors.
33	Incr Allocated Non-Ad Revenue GM	Additional non-ad profit above baseline allocated to the promo item based on the revenue.

Table 3–1 (Cont.) Event Scorecard by Item Report Metrics

Metric Number	Metric	Notes
34	Total GM (Ad + Non-ad)	Profit generated by the item as a result of the ad including the incremental non-ad profit allocated to the promo item.
35	Avg. Ad Unit Price	Average price for each item during the promotion.
36	Avg. Regular Unit Price	Average price for each item when it is not on ad.
37	Avg. Discount%	Percentage savings of Ad price compared to regular price. [Avg. Regular Unit Price - Avg. Ad Unit Price] / Avg. Regular Unit Price
38	Allocated Non-ad Affinity Baseline Sales	Estimated allocated baseline sales of non-ad items during ad period based on the affinity factors.
39	Allocated Non-ad Revenue Baseline Sales	Estimated allocated baseline sales of non-ad items during ad period based on the revenue.
40	Allocated Non-ad Affinity Sales Lift%	This metric compares allocated non-ad sales during ad event against estimated baseline non-ad sales. Percentage change in allocated non-ad sales over baseline due to ad event based on the affinity factors.
41	Allocated Non-ad Revenue Sales Lift%	This metric compares allocated non-ad sales during ad event against estimated baseline non-ad sales. Percentage change in allocated non-ad sales over baseline due to ad event based on the revenue.
42	Allocated Non-ad Affinity Baseline GM	Estimated allocated baseline profit generated by Non-ad items in MB that are allocated to the promo item based on the affinity factors.
43	Allocated Non-ad Revenue Baseline GM	Estimated allocated baseline profit generated by Non-ad items in MB that are allocated to the promo item based on the revenue.
44	Allocated Non-ad Affinity GM Lift%	This metric compares ad profit by non-ad items against estimated baseline profit allocated to the promo item. Percentage change in profit over baseline due to ad event based on the affinity factors.
45	Allocated Non-ad Revenue GM Lift%	This metric compares ad profit by non-ad items against estimated baseline profit allocated to the promo item. Percentage change in profit over baseline due to ad event based on the revenue.
46	Avg Ad Units per Store	Average units of ad item in offer sold during the ad event.
47	Avg Baseline Units per Store	Average estimated baseline units of ad items in offer during the ad period.
48	Total Ad Units	Total units of ad items in offer sold during the ad event.
49	Baseline Units	Estimated baseline units of ad items in offer during the ad period.
50	Ad Units Lift%	(Total Ad Units - Baseline Units) / Baseline Units

Table 3–1 (Cont.) Event Scorecard by Item Report Metrics

Metric Number	Metric	Notes
51	%Cherry Picked	# of transactions with only Ad item divided by the # of All Transactions with Ad item. This shows the% of market baskets that only contain the item on ad.
52	Allocated Non-ad Affinity Units	Total non-ad units (baseline + incremental) allocated to the ad item based on the affinity factors.
53	Allocated Non-ad Revenue Units	Total non-ad units (baseline + incremental) allocated to the ad item based on the revenue.
54	Allocated Non-ad Affinity Baseline Units	Estimated allocated baseline units of non-ad items during ad period based on the affinity factors.
55	Allocated Non-ad Revenue Baseline Units	Estimated allocated baseline units of non-ad items during ad period based on the revenue.
56	Incr Allocated Non-ad Affinity Units	Additional non-ad units above baseline allocated to the ad item based on the affinity factors.
58	Incr Allocated Non-ad Revenue Units	Additional non-ad units above baseline allocated to the ad item based on the revenue.
59	Allocated Non-ad Affinity Units Lift%	This metric compares the allocated non-ad units during the ad event to estimated baseline non-ad units. It is the percentage change in the allocated non-ad units over baseline due to ad event based on the affinity factors.
60	Allocated Non-ad Revenue Units Lift%	This metric compares the allocated non-ad units during the ad event to estimated baseline non-ad units. It is the percentage change in the allocated non-ad units over baseline due to ad event based on the revenue.
61	Ad Item Value Index	<p>This is a score of the ad item's promotion effectiveness. It provides a single weighted value that takes the incremental lift of revenue, profit, and units into consideration.</p> <p>The standard report uses the following values for calculation:</p> $(((\text{Item Ad Sales Lift\%} \times .4) + (\text{Item Ad GM Lift\%} \times .4) + (\text{Ad Units\% Chng} \times .2)) + 100)$
62	Total Value Index	<p>This is a score of the overall promotion effectiveness of an ad item including its impact on allocated non-ad performance. It provides a single, weighted value that takes the incremental lift of revenue, profit, and units of the ad item and non-ad items into consideration.</p> <p>The standard report uses the following values:</p> $\text{Value Index} + ((\text{Affinity Sales Lift\%} \times .4) + (\text{Affinity GM Lift\%} \times .4) + (\text{Affinity Units Lift\%} \times .2))$
63	Num of Ads	Number of ads in the report.

Event Scorecard By Offer/Dept Report

Business Value

This report provides an analysis of the effect that each offer/department combination has on the success of particular events.

Report Prompts and Display

Select from the following options to create an Event Scorecard by Offer/Department Report:

1. **Event**—(required). Choose an event.
2. **Department**—(optional). Select a department.
3. Click **Run Report** to create the report.

Table 3–2 Event Scorecard by Offer/Department Report Metrics

Metric Number	Metric	Notes
1	Event	Event name that represents a group of promotions such as versions of a single ad.
2	Dept	Department id and description of dept shown in 2 separate columns. Available on all scorecard reports.
3	Start Date	Start date of promotion.
4	Position	Page number and position number.
5	External Offer Name	Offer Name.
6	Description	Description of offer.
7	Item Ad MB Count	Count of ad transactions that contain at least one unit of the ad item.
8	Item Baseline MB Count	*Applicable to SKU-level only. Estimated count of baseline transactions that contain the ad item during the ad event period.
9	Incr Item MB Count	*Applicable to SKU-level only. Additional number of transactions that contain the ad item result of the promotion compared with the estimated baseline count. [Item Ad MB Count - Item Baseline MB Count]
10	Item MB Count Lift%	Count of item ad transactions compared to estimated baseline transactions. Percentage change in MB count over baseline due to ad event. [Incr Item MB Count / Item Baseline MB Count] * 100
11	Total Incr Sales	Additional sales during ad event of the ad item plus additional non-ad sales allocated to the ad item compared to estimated baseline sales.
12	Incr Sales Lift%	[(Total Incr Sales / Item Baseline Sales + Allocated Non-ad Baseline Sales) * 100]

Table 3–2 (Cont.) Event Scorecard by Offer/Department Report Metrics

Metric Number	Metric	Notes
13	Total Incr GM	Additional profit during ad event of the ad item plus additional profit generated by non-ad items allocated to the ad item compared to baseline profit.
14	Incr GM Lift%	$[(\text{Total Incr GM} / \text{Item Baseline GM}) + \text{Allocated Non-ad Baseline GM}] * 100$
15	Item Ad Sales	Sales generated by the ad item during the ad event (excluding affinity effects).
16	Item Baseline Sales	Estimated baseline sales generated by the ad item during the ad period.
17	Incr Item Sales	Additional sales generated by the item as a result of the ad event compared with the estimated baseline sales. $[\text{Item Ad Sales} - \text{Item Baseline Sales}]$
18	Item Ad Sales Lift%	This metric compares sales by ad item against baseline sales. Percentage change in sales over baseline due to ad event. $(\text{Incremental Item Sales} / \text{Item Baseline Sales}) * 100$
19	Allocated Non-ad Affinity Sales	Total non-ad sales (baseline + incremental) allocated to the ad item based on the affinity factors.
20	Allocated Non-ad Revenue Sales	Total non-ad sales (baseline + incremental) allocated to the ad item based on the revenue.
21	Incr Allocated Non-Ad Affinity Sales	Additional non-ad sales above baseline allocated to the ad item based on the affinity factors.
22	Incr Allocated Non-Ad Revenue Sales	Additional non-ad sales above baseline allocated to the ad item based on the revenue.
23	Total Sales (Ad + Non-ad)	Total sales generated by the item as a result of the ad event including the incremental non-ad sales allocated to the item.
24	Item Ad GM	Profit generated by the ad item during the ad event (excluding affinity effects).
25	Item Baseline GM	Estimated baseline profit generated by the ad item during the ad period.
26	Incr Item GM	Additional profit generated by the ad item as a result of the ad event compared with the baseline. $(\text{Incr Item Ad GM} / \text{Baseline GM}) * 100$
27	Item Ad GM Lift%	This metric compares ad profit by ad item against baseline profit. Percentage change in profit over baseline due to ad event. $(\text{Incr Item GM} / \text{Item Baseline GM}) * 100$
28	Allocated Non-ad Affinity GM	Total non-ad profit (baseline + incremental) allocated to the promotional item based on the affinity factors.

Table 3–2 (Cont.) Event Scorecard by Offer/Department Report Metrics

Metric Number	Metric	Notes
29	Allocated Non-ad Revenue GM	Total non-ad profit (baseline + incremental) allocated to the promotional item based on the revenue.
30	Incr Allocated Non-ad Affinity GM	Additional non-ad profit above baseline allocated to the promo item based on the affinity factors.
31	Incr Allocated Non-ad Revenue GM	Additional non-ad profit above baseline allocated to the promo item based on the revenue.
32	Total GM (Ad + Non-ad)	Profit generated by the item as a result of the ad including the incremental non-ad profit allocated to the promo item.
33	Avg. Ad Unit Price	Average price for each item during the promotion
34	Avg. Regular Unit Price	Average price for each item when it is not on ad.
35	Avg. Discount%	Percentage savings of Ad price compared to regular price. [Avg. Regular Unit Price - Avg. Ad Unit Price] / Avg. Regular Unit Price
36	Allocated Non-ad Affinity Baseline Sales	Estimated allocated baseline sales of non-ad items during ad period based on the affinity factors.
37	Allocated Non-ad Revenue Baseline Sales	Estimated allocated baseline sales of non-ad items during ad period based on the revenue.
38	Allocated Non-ad Affinity Sales Lift%	This metric compares allocated non-ad sales during ad event against estimated baseline non-ad sales. Percentage change in allocated non-ad sales over baseline due to the ad event based on the affinity factors.
39	Allocated Non-ad Revenue Sales Lift%	This metric compares allocated non-ad sales during ad event against estimated baseline non-ad sales. Percentage change in allocated non-ad sales over baseline due to the ad event based on the revenue.
40	Allocated Non-ad Affinity Baseline GM	Estimated allocated baseline profit generated by Non-ad items in MB that are allocated to the promo item based on the affinity factors.
41	Allocated Non-ad Revenue Baseline GM	Estimated allocated baseline profit generated by Non-ad items in MB that are allocated to the promo item based on the revenue.
42	Allocated Non-ad Affinity GM Lift%	This metric compares ad profit by non-ad items against estimated baseline profit allocated to the promo item. Percentage change in profit over baseline due to ad event based on the affinity factors.
43	Allocated Non-ad Revenue GM Lift%	This metric compares ad profit by non-ad items against estimated baseline profit allocated to the promo item. Percentage change in profit over baseline due to ad event based on the revenue.
44	Avg Sales per Ad MB	Average sales per transaction containing ad items from the offer.

Table 3–2 (Cont.) Event Scorecard by Offer/Department Report Metrics

Metric Number	Metric	Notes
45	Avg GM per Ad MB	Average profit per transaction containing ad items from the offer.
46	Avg Units per Ad MB	Average units per transaction containing ad items from the offer.
47	Avg Ad Units per Ad MB	Average number of ad items in a MB. Determines whether consumers are buying more of the items being promoted.
48	Avg Ad Units per Store	Average units of ad item in offer sold during the ad event.
49	Avg Baseline Units per Store	Average estimated baseline units of ad items in offer during the ad period.
50	Total Ad Units	Total units of ad items in offer sold during the ad event.
51	Baseline Units	Estimated baseline units of ad items in offer during the ad period.
52	Ad Units Lift%	$(\text{Total Ad Units} - \text{Baseline Units}) / \text{Baseline Units}$
53	%Cherry Picked	# of transactions with only Ad item divided by the # of all transactions with ad item. This shows the % of the market baskets that only contain the item on ad.
54	Allocated Non-ad Affinity Units	Total non-ad units (baseline + incremental) allocated to the ad item based on the affinity factors.
55	Allocated Non-ad Revenue Units	Total non-ad units (baseline + incremental) allocated to the ad item based on the revenue.
56	Allocated Non-ad Affinity Baseline Units	Estimated allocated baseline units of non-ad items during ad period based on the affinity factors.
58	Allocated Non-ad Revenue Baseline Units	Estimated allocated baseline units of non-ad items during ad period based on the revenue.
59	Incr Allocated Non-ad Affinity Units	Additional non-ad units above baseline allocated to the ad item based on the affinity factors.
60	Incr Allocated Non-ad Revenue Units	Additional non-ad units above baseline allocated to the ad item based on the revenue.
61	Allocated Non-ad Affinity Units Lift%	This metric compares the allocated non-ad units during the ad event to estimated baseline non-ad units. It is the percentage change in the allocated non-ad units over baseline due to ad event based on the affinity factors.
62	Allocated Non-ad Revenue Units Lift%	This metric compares the allocated non-ad units during the ad event to estimated baseline non-ad units. It is the percentage change in the allocated non-ad units over baseline due to ad event based on the revenue.

Table 3–2 (Cont.) Event Scorecard by Offer/Department Report Metrics

Metric Number	Metric	Notes
63	Ad Item Value Index	<p>This is a score of the ad item's promotion effectiveness. It provides a single weighted value that takes the incremental lift of revenue, profit, and units into consideration.</p> <p>The standard report uses the following values for calculation:</p> $(((\text{Item Ad Sales Lift\%} \times .4) + (\text{Item Ad GM Lift\%} \times .4) + (\text{Ad Units\% Chng} \times .2)) + 100)$
64	Total Value Index	<p>This is a score of the overall promotion effectiveness of an ad item including its impact on allocated non-ad performance. It provides a single, weighted value that takes the incremental lift of revenue, profit, and units of the ad item and non-ad items into consideration.</p> <p>The standard report uses the following values:</p> $\text{Value Index} + ((\text{Affinity Sales Lift\%} \times .4) + (\text{Affinity GM Lift\%} \times .4) + (\text{Affinity Units Lift\%} \times .2))$
65	Num of Ads	Number of ads in the report.

Event Scorecard By Class Report

Business Value

This report provides an analysis of the effect that individual classes have on the success of particular events. Viewers of this report also have the option of drilling into the metrics for Incr Allocated Non-Ad Sales, Incr Allocated Non-Ad GM, and Incr Allocated Non-Ad Units.

Report Prompts and Display

Select from the following options to create an Event Scorecard by Class Report:

1. **Event**—(required). Select an event.
2. **Merchandise Hierarchy**—(optional). Select elements from the Merchandise Hierarchy.
3. Click **Run Report** to create the report.

Table 3–3 Event Scorecard By Class Report Metrics

Metric Number	Metric	Notes
1	Dept	Department id.
2	Class	Class id and description of class shown in 2 separate columns.
3	Event	Event name that represents a group of promotions such as versions of a single ad.
4	Start Date	Start date of promotion.
5	Item Ad MB Count	Count of ad transactions that contain at least one unit of the ad item.

Table 3–3 (Cont.) Event Scorecard By Class Report Metrics

Metric Number	Metric	Notes
6	Item Baseline MB Count	*Applicable to SKU-level only. Estimated count of baseline transactions that contain the ad item during the ad event period.
7	Incr Item MB Count	*Applicable to SKU-level only. Additional number of transactions that contain the ad item result of the promotion compared with the estimated baseline count. [Item Ad MB Count - Item Baseline MB Count]
8	Item MB Count Lift%	Count of item ad transactions compared to estimated baseline transactions. Percentage change in MB count over baseline due to ad event. [Incr Item MB Count / Item Baseline MB Count] * 100
9	Total Incr Sales	Additional sales during ad event of the ad item plus additional non-ad sales allocated to the ad item compared to estimated baseline sales.
10	Incr Sales Lift%	[(Total Incr Sales / Item Baseline Sales + Allocated Non-ad Baseline Sales) * 100]
11	Total Incr GM	Additional profit during ad event of the ad item plus additional profit generated by non-ad items allocated to the ad item compared to estimated baseline profit.
12	Incr GM Lift%	[(Total Incr GM / Item Baseline GM) + Allocated Non-ad Baseline GM] * 100
13	Item Ad Sales	Sales generated by the ad item during the ad event (excluding affinity effects).
14	Item Baseline Sales	Estimated baseline sales generated by the ad item during the ad period.
15	Incr Item Sales	Additional sales generated by the item as a result of the ad event compared with the estimated baseline sales. [Item Ad Sales - Item Baseline Sales]
16	Item Ad Sales Lift%	This metric computes sales by ad item against baseline sales. Percentage change in sales over baseline due to ad event.
17	Allocated Non-ad Affinity Sales	Total non-ad sales (baseline + incremental) allocated to the ad item based on the affinity factors.
18	Allocated Non-ad Revenue Sales	Total non-ad sales (baseline + incremental) allocated to the ad item based on the revenue.
19	Incr Allocated Non-ad Affinity Sales	Additional non-ad sales above baseline allocated to the ad item based on the affinity factors.
20	Incr Allocated Non-ad Revenue Sales	Additional non-ad sales above baseline allocated to the ad item based on the revenue.
21	Total Sales (Ad + Non-ad)	Total sales generated by the item as a result of the ad event including the incremental non-ad sales allocated to the item.

Table 3–3 (Cont.) Event Scorecard By Class Report Metrics

Metric Number	Metric	Notes
22	Item Ad GM	Profit generated by the ad item during the ad event (excluding affinity effects).
23	Item Baseline GM	Estimated baseline profit generated by the ad item during the ad period.
24	Incr Item GM	Additional profit generated by the ad item as a result of the ad event compared with the baseline.
25	Item Ad GM Lift%	This metric compares ad profit by ad item against baseline profit. Percentage change in profit over baseline due to ad event.
26	Allocated Non-ad Affinity GM	Total non-ad profit (baseline + incremental) allocated to the promotional item based on the affinity factors.
27	Allocated Non-ad Revenue GM	Total non-ad profit (baseline + incremental) allocated to the promotional item based on the revenue.
28	Incr Allocated Non-ad Affinity GM	Additional non-ad profit above baseline allocated to the promo item based on the affinity factors.
29	Incr Allocated Non-ad Revenue GM	Additional non-ad profit above baseline allocated to the promo item based on the revenue.
30	Total GM (Ad + Non-ad)	Profit generated by the item as a result of the ad including the incremental non-ad profit allocated to the promo item.
31	Avg. Ad Unit Price	Average price for each item during the promotion.
32	Avg. Regular Unit Price	Average price for each item when it is not on ad.
33	Avg. Discount%	Percentage savings of Ad price compared to regular price. $[\text{Avg. Regular Unit Price} - \text{Avg. Ad Unit Price}] / \text{Avg. Regular Unit Price}$
34	Allocated Non-ad Affinity Baseline Sales	Estimated allocated baseline sales of non-ad items during ad period based on the affinity factors.
35	Allocated Non-ad Revenue Baseline Sales	Estimated allocated baseline sales of non-ad items during ad period based on the revenue.
36	Allocated Non-ad Affinity Sales Lift%	This metric compares allocated non-ad sales during ad event against estimated baseline non-ad sales. Percentage change in allocated non-ad sales over baseline due to ad event based on the affinity factors. $(\text{Incr Allocated Non-ad Sales} / \text{Allocated Non-ad Baseline Sales}) * 100$
37	Allocated Non-ad Revenue Sales Lift%	This metric compares allocated non-ad sales during ad event against estimated baseline non-ad sales. Percentage change in allocated non-ad sales over baseline due to ad event based on the revenue. $(\text{Incr Allocated Non-ad Sales} / \text{Allocated Non-ad Baseline Sales}) * 100$

Table 3–3 (Cont.) Event Scorecard By Class Report Metrics

Metric Number	Metric	Notes
38	Allocated Non-ad Affinity Baseline GM	Estimated allocated baseline profit generated by Non-ad items in MB that are allocated to the promo item based on the affinity factors.
39	Allocated Non-ad Revenue Baseline GM	Estimated allocated baseline profit generated by Non-ad items in MB that are allocated to the promo item based on the revenue.
40	Allocated Non-ad Affinity GM Lift%	This metric compares ad profit by non-ad items against estimated baseline profit allocated to the promo item. Percentage change in profit over baseline due to ad event based on the affinity factors.
41	Allocated Non-ad Revenue GM Lift%	This metric compares ad profit by non-ad items against estimated baseline profit allocated to the promo item. Percentage change in profit over baseline due to ad event based on the revenue.
42	Avg Sales per MB	The average sales of a transaction containing items from the merchandise level.
43	Avg GM per MB	The average profit of a transaction containing items from the merchandise level.
44	Avg Units per MB	The average size of a transaction containing items from the merchandise level.
45	Avg Ad Units per Store	Average units of ad item in offer sold during the ad event.
46	Avg Baseline Units per Store	Average estimated baseline units of ad items in offer during the ad period.
47	Total Ad Units	Total units of ad items in offer sold during the ad event.
48	Baseline Units	Estimated baseline units of ad items in offer during the ad period.
49	Ad Units Lift%	$(\text{Total Ad Units} - \text{Baseline Units}) / \text{Baseline Units}$
50	Allocated Non-ad Affinity Units	Total non-ad units (baseline + incremental) allocated to the ad item based on the affinity factors.
51	Allocated Non-ad Revenue Units	Total non-ad units (baseline + incremental) allocated to the ad item based on the revenue.
52	Allocated Non-Ad Affinity Baseline Units	Estimated allocated baseline units of non-ad items during ad period based on the affinity factors.
53	Allocated Non-Ad Revenue Baseline Units	Estimated allocated baseline units of non-ad items during ad period based on the revenue.
54	Incr Allocated Non-Ad Affinity Units	Additional non-ad units above baseline allocated to the ad item based on the affinity factors.
55	Incr Allocated Non-Ad Revenue Units	Additional non-ad units above baseline allocated to the ad item based on the revenue.

Table 3–3 (Cont.) Event Scorecard By Class Report Metrics

Metric Number	Metric	Notes
56	Allocated Non-Ad Affinity Units Lift%	This metric compares the allocated non-ad units during the ad event to estimated baseline non-ad units. It is the percentage change in the allocated non-ad units over baseline due to ad event based on the affinity factors.
58	Allocated Non-Ad Revenue Units Lift%	This metric compares the allocated non-ad units during the ad event to estimated baseline non-ad units. It is the percentage change in the allocated non-ad units over baseline due to ad event based on the revenue.
59	Ad Item Value Index	<p>This is a score of the ad item's promotion effectiveness. It provides a single weighted value that takes the incremental lift of revenue, profit, and units into consideration.</p> <p>The standard report uses the following values for calculation:</p> $(((\text{Item Ad Sales Lift\%} \times .4) + (\text{Item Ad GM Lift\%} \times .4) + (\text{Ad Units\% Chng} \times .2)) + 100)$
60	Total Value Index	<p>This is a score of the overall promotion effectiveness of an ad item including its impact on allocated non-ad performance. It provides a single, weighted value that takes the incremental lift of revenue, profit, and units of the ad item and non-ad items into consideration.</p> <p>The standard report uses the following values:</p> $\text{Value Index} + ((\text{Affinity Sales Lift\%} \times .4) + (\text{Affinity GM Lift\%} \times .4) + (\text{Affinity Units Lift\%} \times .2))$
61	Num of Ads	Number of ads in the report.

Event Scorecard By Sub-Class Report

Business Value

This report provides an analysis of the effect that individual sub-classes have on the success of particular events. Viewers of this report also have the option of drilling into the metrics for Incr Allocated Non-Ad Sales, Incr Allocated Non-Ad GM, and Incr Allocated Non-Ad Units.

Report Prompts and Display

Select from the following options to create an Event Scorecard by Sub-Class Report:

1. **Event**—(required). Select an event.
2. **Merchandise Hierarchy**—(optional). Select an attribute from the Merchandise Hierarchy.
3. Click **Run Report** to create the report.

Table 3–4 Event Scorecard By Sub-Class Report Metrics

Metric Number	Metric	Notes
1	Dept	Department id and description of dept shown in 2 separate columns.
2	Class	Class id and description of class shown in 2 separate columns.
3	SubClass	Sub-Class id and description of Sub-Class shown in 2 separate columns.
4	Event	Event name that represents a group of promotions such as versions of a single ad.
5	Start Date	Start date of event.
6	Item Ad MB Count	Count of ad transactions that contain at least one unit of the ad item.
7	Item Baseline MB Count	*Applicable to SKU-level only. Estimated count of baseline transactions that contain the ad item during the ad event period.
8	Incr Item MB Count	*Applicable to SKU-level only. Additional number of transactions that contain the ad item result of the promotion compared with the estimated baseline count. [Item Ad MB Count - Item Baseline MB Count]
9	Item MB Count Lift %	Count of item ad transactions compared to estimated baseline transactions. Percentage change in MB count over baseline due to ad event. [Incr Item MB Count / Item Baseline MB Count] * 100
10	Total Incr Sales	Additional sales during ad event of the ad items plus additional non-ad sales allocated to the item compared to estimated baseline sales.
11	Incr Sales Lift%	[Total Incr Sales / Item Baseline Sales + Allocated Non-ad Baseline Sales] * 100
12	Total Incr GM	Additional profit during ad event of the ad items plus additional profit generated by non-ad items allocated to the ad item compared to estimated baseline profit. Incr Item GM + Incr Allocated Non-ad GM
13	Incr GM Lift%	[(Total Incr GM / Baseline GM) + Allocated Non-ad Baseline GM] * 100
14	Item Ad Sales	Sales generated by the ad item during the ad event (excluding affinity effects).
15	Item Baseline Sales	Estimated baseline sales generated by the ad item during the ad period.
16	Incr Item Sales	Additional sales generated by the item as a result of the ad event compared with the estimated baseline sales. [Item Ad Sales - Item Baseline Sales]

Table 3–4 (Cont.) Event Scorecard By Sub-Class Report Metrics

Metric Number	Metric	Notes
17	Item Ad Sales Lift%	This metric compares sales by ad item against baseline sales. Percentage change in sales over baseline due to ad event. $(\text{Incremental Item Sales} / \text{Item Baseline Sales}) * 100$
18	Allocated Non-Ad Affinity Sales	Total non-ad sales (baseline + incremental) allocated to the ad item based on the affinity factors.
19	Allocated Non-Ad Revenue Sales	Total non-ad sales (baseline + incremental) allocated to the ad item based on the revenue.
20	Incr Allocated Non-Ad Affinity Sales	Additional non-ad sales above baseline, allocated to the ad item based on the affinity factors.
21	Incr Allocated Non-Ad Revenue Sales	Additional non-ad sales above baseline, allocated to the ad item based on the revenue.
22	Total Sales (Ad + Non-Ad)	Total sales generated by the item as a result of the ad event including the incremental non-ad sales allocated to the item.
23	Item Ad GM	Profit generated by the ad item during the ad event (excluding affinity effects).
24	Item Baseline GM	Estimated baseline profit generated by the ad item during the ad period.
25	Incr Item GM	Additional profit generated by the ad item as a result of the ad event compared with the baseline.
26	Item Ad GM Lift%	This metric compares ad profit by ad item against baseline profit. Percentage change in profit over baseline due to ad event. $[\text{Incr Item GM} / \text{Item Baseline GM}] * 100$
27	Allocated Non-Ad Affinity GM	Total non-ad profit (baseline + incremental) allocated to the promo item based on the affinity factors.
28	Allocated Non-Ad Revenue GM	Total non-ad profit (baseline + incremental) allocated to the promo item based on the revenue.
29	Incr Allocated Non-Ad Affinity GM	Additional non-ad profit above baseline, allocated to the promo item based on the affinity factors.
30	Incr Allocated Non-Ad Revenue GM	Additional non-ad profit above baseline, allocated to the promo item based on the revenue.
31	Total GM (Ad + Non-Ad)	Profit generated by the item as a result of the ad including the incremental non-ad profit allocated to the promo item. $[\text{Item Ad GM} + \text{Allocated Non-ad GM}]$
32	Avg Ad Unit Price	Average price for each item during the promotion.
33	Avg Regular Unit Price	Average price for each item when it is not on ad.

Table 3–4 (Cont.) Event Scorecard By Sub-Class Report Metrics

Metric Number	Metric	Notes
34	Avg Discount%	Percentage savings of Ad price compared to regular price. [Avg. Regular Unit Price - Avg. Ad Unit Price] / Avg. Regular Unit Price
35	Allocated Non-ad Affinity Baseline Sales	Estimated allocated baseline sales non-ad items during ad period based on the affinity factors.
36	Allocated Non-ad Revenue Baseline Sales	Estimated allocated baseline sales non-ad items during ad period based on the revenue.
37	Allocated Non-ad Affinity Sales Lift%	This metric compares allocated non-ad sales during ad event against estimated baseline non-ad sales. Percentage change in allocated non-ad sales over baseline due to ad event based on the affinity factors.
38	Allocated Non-ad Revenue Sales Lift%	This metric compares allocated non-ad sales during ad event against estimated baseline non-ad sales. Percentage change in allocated non-ad sales over baseline due to ad event based on the revenue.
39	Allocated Non-ad Affinity Baseline GM	Estimated allocated baseline profit generated by Non-ad items in MB that are allocated to the promo item based on the affinity factors.
40	Allocated Non-ad Revenue Baseline GM	Estimated allocated baseline profit generated by Non-ad items in MB that are allocated to the promo item based on the revenue.
41	Allocated Non-ad Affinity GM Lift%	This metric compares ad profit by non-ad items against estimated baseline profit allocated to the promo item. Percentage change in profit over baseline due to ad event based on the affinity factors.
42	Allocated Non-ad Revenue GM Lift%	This metric compares ad profit by non-ad items against estimated baseline profit allocated to the promo item. Percentage change in profit over baseline due to ad event based on the revenue.
43	Avg Sales per MB	Average sales of a transaction containing items from the merchandise level.
44	Avg GM per MB	Average profit of a transaction containing items from the merchandise level.
45	Avg Units per MB	Average size of a transaction containing items from the merchandise level.
46	Avg Ad Units per Store	Average units of ad item in offer sold during ad event.
47	Avg Baseline Units per Store	Average estimated baseline units, of ad items in offer, during the ad period.
48	Total Ad Units	Total units of ad items in offer sold during the ad event.
49	Baseline Units	Estimated baseline units of ad items in offer during the ad period.
50	Ad Units Lift%	(Total Ad Units - Baseline Units) / Baseline Units
51	Num of Ads	Number of Ads contained within the report.

Table 3–4 (Cont.) Event Scorecard By Sub-Class Report Metrics

Metric Number	Metric	Notes
52	Allocated Non–ad Affinity Units	Total non–ad units (baseline + incremental) allocated to the ad item based on the affinity factors.
53	Allocated Non–ad Revenue Units	Total non–ad units (baseline + incremental) allocated to the ad item based on the revenue.
54	Allocated Non–Ad Affinity Baseline Units	Estimated allocated baseline units of non–ad items during ad period based on the affinity factors.
55	Allocated Non–Ad Revenue Baseline Units	Estimated allocated baseline units of non–ad items during ad period based on the revenue.
56	Incr Allocated Non–Ad Affinity Units	Additional non–ad units above baseline allocated to the ad item based on the affinity factors.
58	Incr Allocated Non–Ad Revenue Units	Additional non–ad units above baseline allocated to the ad item based on the revenue.
59	Allocated Non–Ad Affinity Units Lift%	This metric compares the allocated non–ad units during the ad event to estimated baseline non–ad units. It is the percentage change in the allocated non–ad units over baseline due to ad event based on the affinity factors.
60	Allocated Non–Ad Revenue Units Lift%	This metric compares the allocated non–ad units during the ad event to estimated baseline non–ad units. It is the percentage change in the allocated non–ad units over baseline due to ad event based on the revenue.
61	Ad Item Value Index	<p>This is a score of the ad item’s promotion effectiveness. It provides a single weighted value that takes the incremental lift of revenue, profit, and units into consideration.</p> <p>The standard report uses the following values for calculation:</p> $(((\text{Item Ad Sales Lift\%} \times .4) + (\text{Item Ad GM Lift\%} \times .4) + (\text{Ad Units\% Chng} \times .2)) + 100)$
62	Total Value Index	<p>This is a score of the overall promotion effectiveness of an ad item including its impact on allocated non–ad performance. It provides a single, weighted value that takes the incremental lift of revenue, profit, and units of the ad item and non–ad items into consideration.</p> <p>The standard report uses the following values:</p> $\text{Value Index} + ((\text{Affinity Sales Lift\%} \times .4) + (\text{Affinity GM Lift\%} \times .4) + (\text{Affinity Units Lift\%} \times .2))$

Event Scorecard by Department-Offer Amt

Business Value

This report provides an analysis of the effectiveness of different offer types and amounts. This report summarizes the offer type–amount performance within a

department across multiple events. It enables a merchant to determine whether a %off discount was more effective than a price point even if the effective discount was equivalent. Similarly, it can help determine whether a specific offer amount 25% or 30% off of a given offer type was more effective historically.

Report Prompts and Display

Select from the following options to create an Event Scorecard by Department/Offer Amount:

1. **Event**—(required). Select an event.
2. **Filter**—(optional). Filter selections according to merchandise hierarchy level.
3. Click **Run Report** to create the report.

Table 3–5 Standard Metrics in the Department/Offer Amount Report

Metric Number	Metric	Notes
1	Dept	Department Name and ID Number.
2	Offer Type	Type of Offer (e.g.%off, Price Point, etc.).
3	Offer Amount	Amount of the Offer.
4	Item Ad MB Count	Count of ad transactions that contain at least one unit of the ad item.
5	Item Baseline MB Count	*Applicable to SKU-level only. Estimated count of baseline transactions that contain the ad item during the ad event period.
6	Incr Item MB Count	*Applicable to SKU-level only. Additional number of transactions that contain the ad item result of the promotion compared with the estimated baseline count. [Item Ad MB Count - Item Baseline MB Count]
7	Item MB Count Lift%	Count of item ad transactions compared to estimated baseline transactions. Percentage change in MB count over baseline due to ad event. [Incr Item MB Count / Item Baseline MB Count] * 100
8	Total Incr Sales	Additional sales during ad event of the ad item plus additional non-ad sales allocated to the ad item compared to estimated baseline sales
9	Incr Sales Lift%	[(Total Incr Sales / Item Baseline Sales + Allocated Non-ad Baseline Sales] * 100
10	Total Incr GM	Additional profit during ad event of the ad item plus additional profit generated by non-ad items allocated to the ad item compared to estimated baseline profit. Incr Item GM + Incr Allocated Non-ad GM
11	Incr GM Lift%	[(Total Incr Sales/Item Baseline Sales) + Allocated Non—ad Baseline Sales] * 100
12	Item Ad Sales	Sales generated by the ad item during the ad event (excluding affinity effects).
13	Item Baseline Sales	Estimated baseline sales generated by the ad item during the ad period.

Table 3–5 (Cont.) Standard Metrics in the Department/Offer Amount Report

Metric Number	Metric	Notes
14	Incr Item Sales	Additional sales generated by the item as a result of the ad event compared with the estimated baseline sales. [Item Ad Sales - Item Baseline Sales]
15	Item Ad Sales Lift%	This metric compares sales by ad item against baseline sales. Percentage change in sales over baseline due to ad event. [Incremental Item Sales / Item Baseline Sales] * 100
16	Allocated Non–ad Affinity Sales	Total non-ad sales (baseline + incremental) allocated to the ad item based on the affinity factors.
17	Allocated Non–ad Affinity Sales	Total non-ad sales (baseline + incremental) allocated to the ad item based on the revenue.
18	Incr Allocated Non–ad Affinity Sales	Additional non-ad sales above baseline allocated to the ad item based on the affinity factors.
19	Incr Allocated Non–ad Revenue Sales	Additional non-ad sales above baseline allocated to the ad item based on the revenue.
20	Total Sales (Ad+Non–Ad)	Total sales generated by the item as a result of the ad event including the incremental non-ad sales allocated to the item.
21	Item Ad GM	Profit generated by the ad item during the ad event (excluding affinity effects).
22	Item Baseline GM	Estimated baseline profit generated by the ad item during the ad period.
23	Incr Item GM	Additional profit generated by the ad item as a result of the ad event compared with the baseline.
24	Item Ad GM Lift%	This metric compares ad profit by ad item against baseline profit. Percentage change in profit over baseline due to ad event. [Incr Item GM / Item Baseline GM] * 100
25	Allocated Non–ad Affinity GM	Total non-ad profit (baseline + incremental) allocated to the promo item based on the affinity factors.
26	Allocated Non–ad Revenue GM	Total non-ad profit (baseline + incremental) allocated to the promo item based on the revenue.
27	Incr Allocated Non–ad Affinity GM	Additional non-ad profit above baseline, allocated to the promo item based on the affinity factors.
28	Incr Allocated Non–ad Revenue GM	Additional non-ad profit above baseline, allocated to the promo item based on the revenue.
29	Total GM (Ad+Non–Ad)	Profit generated by the item as a result of the ad including the incremental non-ad profit allocated to the promo item. [Item Ad GM + Allocated Non-ad GM]

Table 3–5 (Cont.) Standard Metrics in the Department/Offer Amount Report

Metric Number	Metric	Notes
30	Avg AD Unit Price	Average price for each item during the promotion.
31	Avg Regular Unit Price	Average price for each item when it is not on ad.
32	Avg Discount%	Percentage savings of Ad price compared to regular price. $[\text{Avg. Regular Unit Price} - \text{Avg. Ad Unit Price}] / \text{Avg. Regular Unit Price}$
33	Allocated Non-ad Affinity Baseline Sale	Estimated allocated baseline profit generated by Non-ad items in MB that are allocated to the promo item based on the affinity factors.
34	Allocated Non-ad Revenue Baseline Sale	Estimated allocated baseline profit generated by Non-ad items in MB that are allocated to the promo item based on the revenue.
35	Allocated Non-ad Affinity Sales Lift%	This metric compares allocated non-ad sales during ad event against estimated baseline non-ad sales. Percentage change in allocated non-ad sales over baseline due to ad event based on the affinity factors.
36	Allocated Non-ad Revenue Sales Lift%	This metric compares allocated non-ad sales during ad event against estimated baseline non-ad sales. Percentage change in allocated non-ad sales over baseline due to ad event based on the revenue.
37	Allocated Non-ad Affinity Baseline GM	Estimated allocated baseline profit generated by Non-ad items in MB that are allocated to the promo item based on the affinity factors.
38	Allocated Non-ad Revenue Baseline GM	Estimated allocated baseline profit generated by Non-ad items in MB that are allocated to the promo item based on the revenue.
39	Allocated Non-ad Affinity GM Lift%	This metric compares ad profit by non-ad items against estimated baseline profit allocated to the promo item. Percentage change in profit over baseline due to ad event based on the affinity factors. $\text{Incr Allocated Non-Ad GM} / \text{Allocated Non-Ad Baseline GM} * 100$
40	Allocated Non-ad Affinity GM Lift%	This metric compares ad profit by non-ad items against estimated baseline profit allocated to the promo item. Percentage change in profit over baseline due to ad event based on the revenue. $\text{Incr Allocated Non-Ad GM} / \text{Allocated Non-Ad Baseline GM} * 100$
41	Avg Sales per Ad MB	Average sales per transaction containing ad items from the offer.
42	Avg GM per Ad MB	Average profit per transaction containing ad items from the offer.
43	Avg Units per Ad MB	Average units per transaction containing ad items from the offer.
44	Avg Ad Units per Ad MB	Average number of ad items in a MB. Determines whether consumers are buying more of the items being promoted.

Table 3–5 (Cont.) Standard Metrics in the Department/Offer Amount Report

Metric Number	Metric	Notes
45	Avg Ad Units per Store	Average units of ad item in offer sold during the ad event.
46	Avg Baseline Units per Store	Average estimated baseline units of ad items in offer during the ad period.
47	Total Ad Units	Total units of ad items in offer sold during the ad event.
48	Baseline Units	Estimated baseline units of ad items in offer during the ad period.
49	Ad Units Lift%	$(\text{Total Ad Units} - \text{Baseline Units}) / \text{Baseline Units}$
50	%Cherry Picked	# of transactions with only Ad item divided by the # of All Transactions with Ad item. This shows the% of market baskets that only contain the item on ad.
51	Allocated Non-ad Affinity Units	Total non-ad units (baseline + incremental) allocated to the ad item based on the affinity factors.
52	Allocated Non-ad Revenue Units	Total non-ad units (baseline + incremental) allocated to the ad item based on the revenue.
53	Allocated Non-ad Affinity Baseline Units	Estimated allocated baseline units of non-ad items during ad period based on the affinity factors.
54	Allocated Non-ad Revenue Baseline Units	Estimated allocated baseline units of non-ad items during ad period based on the revenue.
55	Incr Allocated Non-ad Affinity Units	Additional non-ad units above baseline allocated to the ad item based on the affinity factors.
56	Incr Allocated Non-ad Revenue Units	Additional non-ad units above baseline allocated to the ad item based on the revenue.
58	Allocated Non-ad Affinity Units Lift%	This metric compares the allocated non-ad units during the ad event to estimated baseline non-ad units. It is the percentage change in the allocated non-ad units over baseline due to ad event based on the affinity factors.
59	Allocated Non-ad Revenue Units Lift%	This metric compares the allocated non-ad units during the ad event to estimated baseline non-ad units. It is the percentage change in the allocated non-ad units over baseline due to ad event based on the revenue.
60	Ad Item Value Index	<p>This is a score of the ad item's promotion effectiveness. It provides a single weighted value that takes the incremental lift of revenue, profit, and units into consideration.</p> <p>The standard report uses the following values for calculation:</p> $(((\text{Item Ad Sales Lift\%} \times .4) + (\text{Item Ad GM Lift\%} \times .4) + (\text{Ad Units\% Chng} \times .2)) + 100)$

Table 3–5 (Cont.) Standard Metrics in the Department/Offer Amount Report

Metric Number	Metric	Notes
61	Total Value Index	<p>This is a score of the overall promotion effectiveness of an ad item including its impact on allocated non-ad performance. It provides a single, weighted value that takes the incremental lift of revenue, profit, and units of the ad item and non-ad items into consideration.</p> <p>The standard report uses the following values: $\text{Value Index} + ((\text{Affinity Sales Lift\%} \times .4) + (\text{Affinity GM Lift\%} \times .4) + (\text{Affinity Units Lift\%} \times .2))$</p>
62	Num of Ads	Number of Ads contained within the report.

Event Scorecard by Class-Offer Amt

Business Value

This report provides an analysis of the effectiveness of different offer types and amounts. This report summarizes the offer type–amount performance within a class across multiple events. It enables a merchant to determine whether a %off discount was more effective than a price point even if the effective discount was equivalent. Similarly, it can help determine whether a specific offer amount 25% or 30% off of a given offer type was more effective historically. Viewers of this report also have the option of drilling into the metrics for Incr Allocated Non-Ad Sales, Incr Allocated Non-Ad GM, and Incr Allocated Non-Ad Units.

Report Prompts and Display

Select from the following options to create an Event Scorecard by Class/Offer Amount:

1. **Event**—(required). Select an event.
2. **Filter**—(optional). Filter selections according to merchandise hierarchy level.
3. Click **Run Report** to create the report.

Table 3–6 Standard Metrics in the Class Offer Amount Report

Metric Number	Metric	Notes
1	Dept	Department name and ID number.
2	Class	Class name and ID number.
3	Offer Type	Type of Offer (e.g. %off, Price Point, etc.).
4	Offer Amount	Amount of the Offer.
5	Item Ad MB Count	Count of ad transactions that contain at least one unit of the ad item.
6	Item Baseline MB Count	*Applicable to SKU-level only. Estimated count of baseline transactions that contain the ad item during the ad event period.

Table 3–6 (Cont.) Standard Metrics in the Class Offer Amount Report

Metric Number	Metric	Notes
7	Incr Item MB Count	*Applicable to SKU-level only. Additional number of transactions that contain the ad item result of the promotion compared with the estimated baseline count. [Item Ad MB Count - Item Baseline MB Count]
8	Item MB Count Lift%	Count of item ad transactions compared to estimated baseline transactions. Percentage change in MB count over baseline due to ad event. [Incr Item MB Count / Item Baseline MB Count] * 100
9	Total Incr Sales	Additional sales during ad event of the ad item plus additional non-ad sales allocated to the ad item compared to estimated baseline sales.
10	Incr Sales Lift%	[(Total Incr Sales / Item Baseline Sales + Allocated Non-ad Baseline Sales) * 100]
11	Total Incr GM	Additional profit during ad event of the ad item plus additional profit generated by non-ad items allocated to the ad item compared to estimated baseline profit. Incr Item GM + Incr Allocated Non-ad GM
12	Incr GM Lift%	[(Total Incr Sales / Item Baseline Sales) + Allocated Non-ad Baseline Sales] * 100
13	Item Ad Sales	Sales generated by the ad item during the ad event (excluding affinity effects).
14	Item Baseline Sales	Estimated baseline sales generated by the ad item during the ad period.
15	Incr Item Sales	Additional sales generated by the item as a result of the ad event compared with the estimated baseline sales. [Item Ad Sales - Item Baseline Sales]
16	Item Ad Sales Lift%	This metric compares sales by ad item against baseline sales. Percentage change in sales over baseline due to ad event. [Incremental Item Sales / Item Baseline Sales] * 100
17	Allocated Non–ad Affinity Sales	Total non-ad sales (baseline + incremental) allocated to the ad item based on the affinity factors.
18	Allocated Non–ad Revenue Sales	Total non-ad sales (baseline + incremental) allocated to the ad item based on the revenue.
19	Incr Allocated Non–ad Affinity Sales	Additional non-ad sales above baseline allocated to the ad item based on the affinity factors.
20	Incr Allocated Non-ad Revenue Sales	Additional non-ad sales above baseline allocated to the ad item based on the revenue.
21	Total Sales (Ad+Non–Ad)	Total sales generated by the item as a result of the ad event including the incremental non-ad sales allocated to the item.

Table 3–6 (Cont.) Standard Metrics in the Class Offer Amount Report

Metric Number	Metric	Notes
22	Item Ad GM	Profit generated by the ad item during the ad event (excluding affinity effects).
23	Item Baseline GM	Estimated baseline profit generated by the ad item during the ad period.
24	Incr Item GM	Additional profit generated by the ad item as a result of the ad event compared with the baseline.
25	Item Ad GM Lift%	This metric compares ad profit by ad item against baseline profit. Percentage change in profit over baseline due to ad event. [Incr Item GM / Item Baseline GM] * 100
26	Allocated Non-ad Affinity GM	Total non-ad profit (baseline + incremental) allocated to the promo item based on the affinity factors.
27	Allocated Non-ad Revenue GM	Total non-ad profit (baseline + incremental) allocated to the promo item based on the revenue.
28	Incr Allocated Non-ad Affinity GM	Additional non-ad profit above baseline, allocated to the promo item based on the affinity factors.
29	Incr Allocated Non-ad Revenue GM	Additional non-ad profit above baseline, allocated to the promo item based on the revenue.
30	Total GM (Ad+Non-Ad)	Profit generated by the item as a result of the ad including the incremental non-ad profit allocated to the promo item. [Item Ad GM + Allocated Non-ad GM]
31	Avg AD Unit Price	Average price for each item during the promotion.
32	Avg Regular Unit Price	Average price for each item when it is not on ad.
33	Avg Discount%	Percentage savings of Ad price compared to regular price. [Avg. Regular Unit Price - Avg. Ad Unit Price] / Avg. Regular Unit Price
34	Allocated Non-ad Affinity Baseline Sale	Estimated allocated baseline profit generated by Non-ad items in MB that are allocated to the promo item based on the affinity factors.
35	Allocated Non-ad Revenue Baseline Sale	Estimated allocated baseline profit generated by Non-ad items in MB that are allocated to the promo item based on the revenue.
36	Allocated Non-ad Affinity Sales Lift%	This metric compares allocated non-ad sales during ad event against estimated baseline non-ad sales. Percentage change in allocated non-ad sales over baseline due to ad event based on the affinity factors.
37	Allocated Non-ad Revenue Sales Lift%	This metric compares allocated non-ad sales during ad event against estimated baseline non-ad sales. Percentage change in allocated non-ad sales over baseline due to ad event based on the revenue.

Table 3–6 (Cont.) Standard Metrics in the Class Offer Amount Report

Metric Number	Metric	Notes
38	Allocated Non–ad Affinity Baseline GM	Estimated allocated baseline profit generated by Non-ad items in MB that are allocated to the promo item based on the affinity factors.
39	Allocated Non–ad Revenue Baseline GM	Estimated allocated baseline profit generated by Non-ad items in MB that are allocated to the promo item based on the revenue.
40	Allocated Non–ad Affinity GM Lift%	This metric compares ad profit by non–ad items against estimated baseline profit allocated to the promo item. Percentage change in profit over baseline due to ad event based on the affinity factors. Incr Allocated Non–Ad GM/ Allocated Non–Ad Baseline GM) * 100
41	Allocated Non–ad Revenue GM Lift%	This metric compares ad profit by non–ad items against estimated baseline profit allocated to the promo item. Percentage change in profit over baseline due to ad event based on the revenue. Incr Allocated Non–Ad GM/ Allocated Non–Ad Baseline GM) * 100
42	Avg Sales per Ad MB	Average sales per transaction containing ad items from the offer.
43	Avg GM per Ad MB	Average profit per transaction containing ad items from the offer.
44	Avg Units per Ad MB	Average units per transaction containing ad items from the offer.
45	Avg Ad Units per Ad MB	Average number of ad items in a MB. Determines whether consumers are buying more of the items being promoted.
46	Avg Ad Units per Store	Average units of ad item in offer sold during the ad event.
47	Avg Baseline Units per Store	Average estimated baseline units of ad items in offer during the ad period.
48	Total Ad Units	Total units of ad items in offer sold during the ad event.
49	Baseline Units	Estimated baseline units of ad items in offer during the ad period.
50	Ad Units Lift%	(Total Ad Units - Baseline Units) / Baseline Units
51	%Cherry Picked	# of transactions with only Ad item divided by the # of All Transactions with Ad item. This shows the% of market baskets that only contain the item on ad.
52	Allocated Non–ad Affinity Units	Total non–ad units (baseline + incremental) allocated to the ad item based on the affinity factors.
53	Allocated Non–ad Revenue Units	Total non–ad units (baseline + incremental) allocated to the ad item based on the revenue.
54	Allocated Non–ad Affinity Baseline Units	Estimated allocated baseline units of non–ad items during ad period based on the affinity factors.

Table 3–6 (Cont.) Standard Metrics in the Class Offer Amount Report

Metric Number	Metric	Notes
55	Allocated Non-ad Revenue Baseline Units	Estimated allocated baseline units of non-ad items during ad period based on the revenue.
56	Incr Allocated Non-ad Affinity Units	Additional non-ad units above baseline allocated to the ad item based on the affinity factors.
58	Incr Allocated Non-ad Revenue Units	Additional non-ad units above baseline allocated to the ad item based on the revenue.
59	Allocated Non-Ad Units Lift%	This metric compares the allocated non-ad units during the ad event to estimated baseline non-ad units. It is the percentage change in the allocated non-ad units over baseline due to ad event.
60	Ad Item Value Index	<p>This is a score of the ad item's promotion effectiveness. It provides a single weighted value that takes the incremental lift of revenue, profit, and units into consideration.</p> <p>The standard report uses the following values for calculation:</p> $(((\text{Item Ad Sales Lift\%} \times .4) + (\text{Item Ad GM Lift\%} \times .4) + (\text{Ad Units\% Chng} \times .2)) + 100)$
61	Total Value Index	<p>This is a score of the overall promotion effectiveness of an ad item including its impact on allocated non-ad performance. It provides a single, weighted value that takes the incremental lift of revenue, profit, and units of the ad item and non-ad items into consideration.</p> <p>The standard report uses the following values:</p> $\text{Value Index} + ((\text{Affinity Sales Lift\%} \times .4) + (\text{Affinity GM Lift\%} \times .4) + (\text{Affinity Units Lift\%} \times .2))$
62	Num of Ads	Number of Ads contained within the report.

Event Scorecard by Sub-class-Offer Amt

Business Value

This report provides an analysis of the effectiveness of different offer types and amounts. This report summarizes the offer type-amount performance within a sub-class across multiple events. It enables a merchant to determine whether a %off discount was more effective than a price point even if the effective discount was equivalent. Similarly, it can help determine whether a specific offer amount 25% or 30% off of a given offer type was more effective historically.

Report Prompts and Display

Select from the following options to create an Event Scorecard by Sub-Class/Offer Amount:

1. **Event**—(required). Select an event.
2. **Filter**—(optional). Filter selections according to merchandise hierarchy level.

- Click **Run Report** to create the report.

Table 3–7 Standard Metrics in the Sub-Class/Offer Amount Report

Metric Number	Metric	Notes
1	Dept	Department Name and ID number.
2	Class	Class Name and ID Number.
3	SubClass	Sub-Class Name and ID Number.
4	Offer Type	Type of Offer (e.g.%off, Price Point, etc.).
5	Offer Amt	Amount of the Offer.
6	Item Ad MB Count	Count of ad transactions that contain at least one unit of the ad item.
7	Item Baseline MB Count	*Applicable to SKU-level only. Estimated count of baseline transactions that contain the ad item during the ad event period.
8	Incr Item MB Count	*Applicable to SKU-level only. Additional number of transactions that contain the ad item result of the promotion compared with the estimated baseline count. [Item Ad MB Count - Item Baseline MB Count]
9	Item MB Count Lift%	Count of item ad transactions compared to estimated baseline transactions. Percentage change in MB count over baseline due to ad event. [Incr Item MB Count / Item Baseline MB Count] * 100
10	Total Incr Sales	Additional sales during ad event of the ad item plus additional non-ad sales allocated to the ad item compared to estimated baseline sales
11	Incr Sales Lift%	[(Total Incr Sales / Item Baseline Sales + Allocated Non-ad Baseline Sales) * 100
12	Total Incr GM	Additional profit during ad event of the ad item plus additional profit generated by non-ad items allocated to the ad item compared to estimated baseline profit. Incr Item GM + Incr Allocated Non-ad GM
13	Incr GM Lift%	[(Total Incr Sales / Item Baseline Sales) + Allocated Non-ad Baseline Sales] * 100
14	Item Ad Sales	Sales generated by the ad item during the ad event (excluding affinity effects).
15	Item Baseline Sales	Estimated baseline sales generated by the ad item during the ad period.
16	Incr Item Sales	Additional sales generated by the item as a result of the ad event compared with the estimated baseline sales. [Item Ad Sales - Item Baseline Sales]
17	Item Ad Sales Lift%	This metric compares sales by ad item against baseline sales. Percentage change in sales over baseline due to ad event. [Incremental Item Sales / Item Baseline Sales] * 100

Table 3–7 (Cont.) Standard Metrics in the Sub-Class/Offer Amount Report

Metric Number	Metric	Notes
18	Allocated Non-ad Affinity Sales	Total non-ad sales (baseline + incremental) allocated to the ad item based on the affinity factors.
19	Allocated Non-ad Revenue Sales	Total non-ad sales (baseline + incremental) allocated to the ad item based on the revenue.
20	Incr Allocated Non-ad Affinity Sales	Additional non-ad sales above baseline allocated to the ad item based on the affinity factors.
21	Incr Allocated Non-ad Revenue Sales	Additional non-ad sales above baseline allocated to the ad item based on the revenue.
22	Total Sales (Ad+Non-Ad)	Total sales generated by the item as a result of the ad event including the incremental non-ad sales allocated to the item.
23	Item Ad GM	Profit generated by the ad item during the ad event (excluding affinity effects).
24	Item Baseline GM	Estimated baseline profit generated by the ad item during the ad period.
25	Incr Item GM	Additional profit generated by the ad item as a result of the ad event compared with the baseline.
26	Item Ad GM Lift%	This metric compares ad profit by ad item against baseline profit. Percentage change in profit over baseline due to ad event. [Incr Item GM / Item Baseline GM] * 100
27	Allocated Non-Ad Affinity GM	Total non-ad profit (baseline + incremental) allocated to the promo item based on the affinity factors.
28	Allocated Non-Ad Revenue GM	Total non-ad profit (baseline + incremental) allocated to the promo item based on the revenue.
29	Incr Allocated Non-Ad Affinity GM	Additional non-ad profit above baseline, allocated to the promo item based on the affinity factors.
30	Incr Allocated Non-ad Revenue GM	Additional non-ad profit above baseline, allocated to the promo item based on the revenue.
31	Total GM (Ad+Non-Ad)	Profit generated by the item as a result of the ad including the incremental non-ad profit allocated to the promo item. [Item Ad GM + Allocated Non-ad GM]
32	Avg AD Unit Price	Average price for each item during the promotion.
33	Avg Regular Unit Price	Average price for each item when it is not on ad.
34	Avg Discount%	Percentage savings of Ad price compared to regular price. [Avg. Regular Unit Price - Avg. Ad Unit Price] / Avg. Regular Unit Price

Table 3–7 (Cont.) Standard Metrics in the Sub-Class/Offer Amount Report

Metric Number	Metric	Notes
35	Allocated Non-Ad Affinity Baseline Sale	Estimated allocated baseline profit generated by Non-ad items in MB that are allocated to the promo item based on the affinity factors.
36	Allocated Non-Ad Revenue Baseline Sale	Estimated allocated baseline profit generated by Non-ad items in MB that are allocated to the promo item based on the revenue.
37	Allocated Non-Ad Affinity Sales Lift%	This metric compares allocated non-ad sales during ad event against estimated baseline non-ad sales. Percentage change in allocated non-ad sales over baseline due to ad event based on the affinity factors.
38	Allocated Non-Ad Revenue Sales Lift%	This metric compares allocated non-ad sales during ad event against estimated baseline non-ad sales. Percentage change in allocated non-ad sales over baseline due to ad event based on the revenue.
39	Allocated Non-ad Affinity Baseline GM	Estimated allocated baseline profit generated by Non-ad items in MB that are allocated to the promo item based on the affinity factors.
40	Allocated Non-ad Revenue Baseline GM	Estimated allocated baseline profit generated by Non-ad items in MB that are allocated to the promo item based on the revenue.
41	Allocated Non-Ad Affinity GM Lift%	<p>This metric compares ad profit by non-ad items against estimated baseline profit allocated to the promo item. Percentage change in profit over baseline due to ad event based on the affinity factors.</p> <p>$\text{Incr Allocated Non-Ad GM} / \text{Allocated Non-Ad Baseline GM} * 100$</p>
42	Allocated Non-Ad Revenue GM Lift%	<p>This metric compares ad profit by non-ad items against estimated baseline profit allocated to the promo item. Percentage change in profit over baseline due to ad event based on the revenue.</p> <p>$\text{Incr Allocated Non-Ad GM} / \text{Allocated Non-Ad Baseline GM} * 100$</p>
43	Avg Sales per Ad MB	Average sales per transaction containing ad items from the offer.
44	Avg GM per Ad MB	Average profit per transaction containing ad items from the offer.
45	Avg Units per Ad MB	Average units per transaction containing ad items from the offer.
46	Avg Ad Units per Ad MB	Average number of ad items in a MB. Determines whether consumers are buying more of the items being promoted.
47	Avg Ad Units per Store	Average units of ad item in offer sold during the ad event.
48	Avg Baseline Units per Store	Average estimated baseline units of ad items in offer during the ad period.
49	Total Ad Units	Total units of ad items in offer sold during the ad event.

Table 3–7 (Cont.) Standard Metrics in the Sub-Class/Offer Amount Report

Metric Number	Metric	Notes
50	Baseline Units	Estimated baseline units of ad items in offer during the ad period.
51	Ad Units Lift%	$(\text{Total Ad Units} - \text{Baseline Units}) / \text{Baseline Units}$
52	%Cherry Picked	# of transactions with only Ad item divided by the # of All Transactions with Ad item. This shows the % of market baskets that only contain the item on ad.
53	Allocated Non-Ad Affinity Units	Total non-ad units (baseline + incremental) allocated to the ad item based on the affinity factors.
54	Allocated Non-Ad Revenue Units	Total non-ad units (baseline + incremental) allocated to the ad item based on the revenue.
55	Allocated Non-Ad Affinity Baseline Units	Estimated allocated baseline units of non-ad items during ad period based on the affinity factors.
56	Allocated Non-Ad Revenue Baseline Units	Estimated allocated baseline units of non-ad items during ad period based on the revenue.
58	Incr Allocated Non-Ad Affinity Units	Additional non-ad units above baseline allocated to the ad item based on the affinity factors.
59	Incr Allocated Non-Ad Revenue Units	Additional non-ad units above baseline allocated to the ad item based on the revenue.
60	Allocated Non-Ad Affinity Units Lift%	This metric compares the allocated non-ad units during the ad event to estimated baseline non-ad units. It is the percentage change in the allocated non-ad units over baseline due to ad event based on the affinity factors.
61	Allocated Non-Ad Revenue Units Lift%	This metric compares the allocated non-ad units during the ad event to estimated baseline non-ad units. It is the percentage change in the allocated non-ad units over baseline due to ad event based on the revenue.
62	Ad Item Value Index	<p>This is a score of the ad item's promotion effectiveness. It provides a single weighted value that takes the incremental lift of revenue, profit, and units into consideration.</p> <p>The standard report uses the following values for calculation:</p> $(((\text{Item Ad Sales Lift\%} * .4) + (\text{Item Ad GM Lift\%} * .4) + (\text{Ad Units\% Chng} * .2)) + 100)$
63	Total Value Index	<p>This is a score of the overall promotion effectiveness of an ad item including its impact on allocated non-ad performance. It provides a single, weighted value that takes the incremental lift of revenue, profit, and units of the ad item and non-ad items into consideration.</p> <p>The standard report uses the following values:</p> $\text{Value Index} + ((\text{Affinity Sales Lift\%} * .4) + (\text{Affinity GM Lift\%} * .4) + (\text{Affinity Units Lift\%} * .2))$

Table 3–7 (Cont.) Standard Metrics in the Sub-Class/Offer Amount Report

Metric Number	Metric	Notes
64	Num of Ads	Number of Ads contained within the report.

Event Scorecard by Sub-class (Event / Weekly Comparison) Report

Business Value

This report provides an analysis of the effects that the individual Sub-classes have on the success of specific events

Report Prompts and Display

To create a Event Scorecard by Sub-class (Event / Weekly Comparison) Report:

1. Select the relevant event, time period, and merchandise hierarchy.
2. Click **Run Report** to generate the report. Click **Cancel** to cancel the report.

Table 3–8 Standard Metrics in the Event Scorecard by Sub-class (Event / Weekly Comparison) Report

Metric Number	Metric	Notes
1	Dept	Department id and description of dept shown in 2 separate columns.
2	Class	Class id and description of class shown in 2 separate columns.
3	SubClass	SubClass id and description of Sub-Class shown in 2 separate columns.
4	Event	Event name that represents a group of promotions such as versions of a single ad.
5	Start Date	Start date of the promotion.
6	Comparison Week	Time period (in weeks) in comparison.
7	Item Ad MB Count	Count of ad transactions that contain at least one unit of the ad item.
8	Total Dept Unit Vol	Number of units at the Department level.
9	Total Dept Sales Vol	Amount of sales at the Department level.
10	Total Dept GM Vol	Amount of Gross Margin (GM) at the Department level.
11	Total Dept promo % to total sls	Percentage of promotion when compared to the total sales at the Department level.
12	Total Dept Trans Count	Transaction count at the Department level.
13	Total Class Unit Vol	Number of units at the Class level.
14	Total Class Sales Vol	Amount of sales at the Class level.
15	Total Class GM Vol	Amount of Gross Margin (GM) at the Class level.
16	Total Class promo % to total sls	Percentage of promotion when compared to total sales at the Class level.
17	Total Class Trans Count	Transaction count at the Class level.

Table 3–8 (Cont.) Standard Metrics in the Event Scorecard by Sub-class (Event / Weekly Comparison) Report

Metric Number	Metric	Notes
18	Item Baseline MB Count	*Applicable to SKU-level only. Estimated count of baseline transactions that contain the ad item during the ad event period.
19	Incr Item MB Count	*Applicable to SKU-level only. Additional number of transactions that contain the ad item result of the promotion compared with the estimated baseline count. [Item Ad MB Count - Item Baseline MB Count]
20	Item MB Count Lift %	Count of item ad transactions compared to estimated baseline transactions. Percentage change in MB count over baseline due to ad event. [Incr Item MB Count / Item Baseline MB Count] * 100
21	Total Incr Sales	Additional sales during ad event of the ad item plus additional non-ad sales allocated to the ad item compared to estimated baseline sales.
22	Incr Sales Lift %	[(Total Incr Sales / Item Baseline Sales + Allocated Non-ad Baseline Sales) * 100]
23	Total Incr GM	Additional profit during ad event of the ad item plus additional profit generated by non-ad items allocated to the ad item compared to estimated baseline profit. Incr Item GM + Incr Allocated Non-ad GM
24	Incr GM Lift %	[(Total Incr Sales / Item Baseline Sales) + Allocated Non-ad Baseline Sales] * 100
25	Item Ad Sales	Sales generated by the ad item during the ad event (excluding affinity effects).
26	Item Baseline Sales	Estimated baseline sales generated by the ad item during the ad period.
27	Incr Item Sales	Additional sales generated by the item as a result of the ad event compared with the estimated baseline sales. [Item Ad Sales - Item Baseline Sales]
28	Item Ad Sales Lift %	This metric compares sales by ad item against baseline sales. Percentage change in sales over baseline due to ad event. [Incremental Item Sales / Item Baseline Sales] * 100
29	Allocated Non-Ad Affinity Sales	Total non-ad sales (baseline + incremental) allocated to the ad item based on the affinity factors.
30	Allocated Non-Ad Revenue Sales	Total non-ad sales (baseline + incremental) allocated to the ad item based on the revenue.
31	Incr Allocated Non-Ad Affinity Sales	Additional non-ad sales above baseline allocated to the ad item based on the affinity factors.

Table 3–8 (Cont.) Standard Metrics in the Event Scorecard by Sub-class (Event / Weekly Comparison) Report

Metric Number	Metric	Notes
32	Incr Allocated Non-Ad Revenue Sales	Additional non-ad sales above baseline allocated to the ad item based on the revenue.
33	Total Sales (Ad+Non-Ad)	Total sales generated by the item as a result of the ad event including the incremental non-ad sales allocated to the item.
34	Item Ad GM	Profit generated by the ad item during the ad event (excluding affinity effects).
35	Item Baseline GM	Estimated baseline profit generated by the ad item during the ad period.
36	Incr Item GM	Additional profit generated by the ad item as a result of the ad event compared with the baseline.
37	Item Ad GM Lift %	This metric compares ad profit by ad item against baseline profit. Percentage change in profit over baseline due to ad event.
38	Allocated Non-Ad Affinity GM	Total non-ad profit (baseline + incremental) allocated to the promo item based on the affinity factors.
39	Allocated Non-Ad Revenue GM	Total non-ad profit (baseline + incremental) allocated to the promo item based on the revenue.
40	Incr Allocated Non-Ad Affinity GM	Additional non-ad profit above baseline allocated to the promo item based on the affinity factors.
41	Incr Allocated Non-Ad Revenue GM	Additional non-ad profit above baseline allocated to the promo item based on the revenue.
42	Total GM (Ad + Non-Ad)	Profit generated by the item as a result of the ad including the incremental non-ad profit allocated to the promo item.
43	Avg AD Unit Price	Average price for each item during the promotion.
44	Avg Regular Unit Price	Average price for each item when it is not on ad.
45	Avg Discount %	Percentage savings of Ad price compared to regular price. [Avg. Regular Unit Price - Avg. Ad Unit Price] / Avg. Regular Unit Price
46	Allocated Non-Ad Affinity Baseline Sales	Estimated allocated baseline sales of non-ad items during ad period based on the affinity factors.
47	Allocated Non-Ad Revenue Baseline Sales	Estimated allocated baseline sales of non-ad items during ad period based on the revenue.
48	Allocated Non-Ad Affinity Sales Lift %	This metric compares allocated non-ad sales during ad event against estimated baseline non-ad sales. Percentage change in allocated non-ad sales over baseline due to ad event based on the affinity factors.

Table 3–8 (Cont.) Standard Metrics in the Event Scorecard by Sub-class (Event / Weekly Comparison) Report

Metric Number	Metric	Notes
49	Allocated Non-Ad Revenue Sales Lift %	This metric compares allocated non-ad sales during ad event against estimated baseline non-ad sales. Percentage change in allocated non-ad sales over baseline due to ad event based on the revenue.
50	Allocated Non-Ad Affinity Baseline GM	Estimated allocated baseline profit generated by Non-ad items in MB that are allocated to the promo item based on the affinity factors.
51	Allocated Non-Ad Revenue Baseline GM	Estimated allocated baseline profit generated by Non-ad items in MB that are allocated to the promo item based on the revenue.
52	Allocated Non-Ad Affinity GM Lift %	This metric compares ad profit by non-ad items against estimated baseline profit allocated to the promo item. Percentage change in profit over baseline due to ad event based on the affinity factors.
53	Allocated Non-Ad Revenue GM Lift %	This metric compares ad profit by non-ad items against estimated baseline profit allocated to the promo item. Percentage change in profit over baseline due to ad event based on the revenue.
54	Avg Sales per MB	The average sales of a transaction containing items from the merchandise level.
55	Avg GM per MB	The average profit of a transaction containing items from the merchandise level.
56	Avg Units per MB	The average size of a transaction containing items from the merchandise level.
58	Avg Ad Units per Store	Estimated baseline units of ad items in offer during the ad period.
59	Avg Baseline Units per Store	Average estimated baseline units of ad items in offer during the ad period.
60	Total Ad Units	Total units of ad items in offer sold during the ad event.
61	Baseline Units	Estimated baseline units of ad items in offer during the ad period.
62	Ad Units Lift %	$(\text{Total Ad Units} - \text{Baseline Units}) / \text{Baseline Units}$
63	Allocated Non-Ad Affinity Units	Total non-ad units (baseline + incremental) allocated to the ad item based on the affinity factors.
64	Allocated Non-Ad Revenue Units	Total non-ad units (baseline + incremental) allocated to the ad item based on the revenue.
65	Allocated Non-Ad Affinity Baseline Units	Estimated allocated baseline units of non-ad items during ad period based on the affinity factors.
66	Allocated Non-Ad Revenue Baseline Units	Estimated allocated baseline units of non-ad items during ad period based on the revenue.
67	Incr Allocated Non-Ad Affinity Units	Additional non-ad units above baseline allocated to the ad item based on the affinity factors.

Table 3–8 (Cont.) Standard Metrics in the Event Scorecard by Sub-class (Event / Weekly Comparison) Report

Metric Number	Metric	Notes
68	Incr Allocated Non-Ad Revenue Units	Additional non-ad units above baseline allocated to the ad item based on the revenue.
69	Allocated Non-Ad Affinity Units Lift %	This metric compares the allocated non-ad units during the ad event to estimated baseline non-ad units. It is the percentage change in the allocated non-ad units over baseline due to ad event based on the affinity factors.
70	Allocated Non-Ad Revenue Units Lift %	This metric compares the allocated non-ad units during the ad event to estimated baseline non-ad units. It is the percentage change in the allocated non-ad units over baseline due to ad event based on the revenue.
71	Ad item Value Index	<p>This is a score of the ad item's promotion effectiveness. It provides a single weighted value that takes the incremental lift of revenue, profit, and units into consideration.</p> <p>The standard report uses the following values for calculation:</p> $(((\text{Item Ad Sales Lift\%} \times .4) + (\text{Item Ad GM Lift\%} \times .4) + (\text{Ad Units\% Chng} \times .2)) + 100)$
72	Total Value Index	<p>This is a score of the overall promotion effectiveness of an ad item including its impact on allocated non-ad performance. It provides a single, weighted value that takes the incremental lift of revenue, profit, and units of the ad item and non-ad items into consideration.</p> <p>The standard report uses the following values:</p> $\text{Value Index} + ((\text{Affinity Sales Lift\%} \times .4) + (\text{Affinity GM Lift\%} \times .4) + (\text{Affinity Units Lift\%} \times .2))$
73	Num of Ads	Number of ads in the report.

Overlapping SKUs

Business Value

This report identifies cases where the same SKU exists in different offers in the same event. The specific offers and duplicate SKUs are listed so that the user can correct the offers and avoid a pricing conflict where the same SKU is promoted at different prices.

Report Prompts and Display

To create an Overlapping SKUs report:

1. **Start Date**—(required). Select a start date.
2. **End Date**—(required). Select an end date.
3. **Choose From All Promotions**—(optional). Choose from all promotions or select a specific promotion.

4. **Merchandise Hierarchy**—(optional). Filter results according to merchandise hierarchy level.

Table 3–9 Overlapping SKUs Report Metrics

Metric Number	Metric	Notes
1	Promotion	Name of promotion which contains an overlapping offer/SKU.
2	Date From	Starting date of promotion.
3	Date To	Ending date of promotion.
4	Department ID	Client id to identify the department.
5	Department	Department ID and Description of dept of SKU that is referenced by multiple offers.
6	Offer	Name of the offer that contains a SKU that is also part of a different offer.
7	Created by	Name of person who created the offer.
8	Date Created	Date offer was created.
9	Overlap Offer	Name of offer that contains a SKU that is also part of a different offer.
10	Overlap Created By	Name of person who created the overlapping offer.
11	Overlap Date Created	Date offer was created.
12	Class ID	Class ID and Description of Class of SKU that is referenced by multiple offers.
13	Class	Class of overlapped item.
14	Sub-Class ID	Client ID to identify the Sub-Class.
15	Sub-Class	Sub-Class ID and Description of Sub-Class of SKU that is referenced by multiple offers.
16	SKU ID	Client ID for SKU.
17	SKU	SKU ID and Description of SKU that is referenced by multiple offers.

Affinity Report

Business Value

This report provides information about all affinity products or items that tend to sell with other items. It displays all of the affinity rules produced by the ARM application.

Report Prompts and Display

Select from the following options to create an Affinity Report:

1. **Start Date**—(required). Select an a start date.
2. **Affinity Item A**—(optional). Select attributes from Merchandise Hierarchy A.
3. **Affinity Item B**—(optional). Select attributes from Merchandise Hierarchy B.
4. **Qualify a Metric**—(optional). Select a metric.
5. Click **Run Report** to create the report. Click **Cancel** to cancel.

Table 3–10 Standard Metrics in the Affinity Report

Metric Number	Metric	Notes
1	Dept A	Dept ID and Description.
2	Class A	Class ID and Description.
3	SubClass A	Affinity Node A ID and Description.
4	Dept B	Dept ID and Description.
5	Class B	Class ID and Description.
6	SubClass B	Affinity Node B ID and Description.
7	Time Period	Time period associated with this affinity rule.
8	Item A MBs	Number of MBs with items in Affinity Node A.
9	Item B MBs	Number of MBs with items in Affinity Node B.
10	Affinity MBs	Number of MBs containing items from both affinity nodes A and B.
11	Affinity Index	<p>The Affinity Index measures the strength of association between Items A and B. “How much more like is it for A and B to be in a transaction than what we would expect by mere chance?”</p> <p>If Affinity Index > 10, then A and B are positively connected in the way consumers shop; i.e. 10 times more like than random to find A and B together in the same transaction.</p>
12	Affinity Confidence	The Affinity Confidence measures the probability of finding items from Affinity node A in the basket when items from Affinity Node B are already there.
13	Affinity Reverse Confidence	Affinity Reverse Confidence measures the probability of finding items from Affinity Node A in the basket when items from Affinity Node B are already there.
14	Item A Avg Sales	Average sales generated by Affinity Item A.
15	Item B Avg Sales	Averages sales generated by Affinity Item B.
16	Item A Avg GM	Average profit generated by Affinity Item A.
17	Item B Avg GM	Average profit generated by Affinity Item B.
18	Avg Sales per Affinity MB	Average sales generated by each affinity market basket. This included all item in MB.
19	Avg GM per Affinity MB	Average profit generated by each affinity market basket containing both Item A and B. This includes all items in MB.
20	Avg Units per Affinity MB	Average quantity of items in each affinity market basket containing both Item A and B. This includes all items in MB.
21	% of Item A Units on Promo	Percentage of units sold in Affinity Node A that were on ad during the affinity period. This gives an indication of whether the affinity relationship exists when the items are on ad or not.

Table 3–10 (Cont.) Standard Metrics in the Affinity Report

Metric Number	Metric	Notes
22	% of Item B Units on Promo	Percentage of units sold in Affinity Node B that were on ad during the affinity period. This gives an indication of whether the affinity relationship exists when the items are on ad or not.
23	% of Item A Sales on Promo	Percentage of sales in Affinity Node A that was associated with an ad during the affinity period. This gives an indication of whether the affinity relationship exists when the items are on ad or not.
24	% of Item B Sales on Promo	Percentage of sales in Affinity Node B that was associated with an ad during the affinity period. This gives an indication of whether the affinity relationship exists when the items are on ad or not.

Affinity (Pull)

Business Value

This report provides information about the affinity products or items that tend to sell well with other items. This report shows the affinity relationship over a longer period of time. This report contains metrics similar to the Affinity report as discussed in the previous section but also contains an additional column, “Pull Indicator”, that defines whether the relationship Likely, Unlikely, or Inconclusively drives sales between two items. It displays the affinity rules produced by the ARM application.

Report Prompts and Display

Select from the following options to create an Affinity Pull Report:

1. **ARM Runs Range**—(required). Select an ARM Run range.
2. **Affinity Item A**—(optional). Select Affinity Item A.
3. **Affinity Item B**—(optional). Select Affinity Item B.
4. **Qualify on a Metric**—(optional). Select a qualifying metric.
5. Click **Run Report** to generate the report. Click **Cancel** to cancel.

Table 3–11 Standard Metrics in the Affinity Report

Metric Number	Metric	Notes
1	Dept A	Dept ID and Description.
2	Class A	Class ID and Description.
3	SubClass A	Affinity Node A ID and Description.
4	Dept B	Dept ID and Description.
5	Class B	Class ID and Description.
6	SubClass B	Affinity Node B ID and Description.
7	Time Period	Time period associated with this affinity rule.

Table 3–11 (Cont.) Standard Metrics in the Affinity Report

Metric Number	Metric	Notes
8	Item A MBs	Number of MBs with items in Affinity Node A.
9	Item B MBs	Number of MBs with items in Affinity Node B.
10	Affinity MBs	Number of MBs containing items from both affinity nodes A and B.
11	Affinity Index	<p>The Affinity Index measures the strength of association between Items A and B. “How much more like is it for A and B to be in a transaction than what we would expect by mere chance?”</p> <p>If Affinity Index > 10, then A and B are positively connected in the way consumers shop; i.e. 10 times more like than random to find A and B together in the same transaction.</p>
12	Affinity Confidence	The Affinity Confidence measures the probability of finding items from Affinity node A in the basket when items from Affinity Node B are already there.
13	Affinity Reverse Confidence	Affinity Reverse Confidence measures the probability of finding items from Affinity Node A in the basket when items from Affinity Node B are already there.
14	Pull	Determines if the relationship Likely, Unlikely, or Inconclusively drives sales between Item A and Item B.
15	Item A Avg Sales	Average sales generated by Affinity Item A.
16	Item B Avg Sales	Averages sales generated by Affinity Item B.
17	Item A Avg GM	Average profit generated by Affinity Item A.
18	Item B Avg GM	Average profit generated by Affinity Item B.
19	Avg Sales per Affinity MB	Average sales generated by each affinity market basket. This included all item in MB.
20	Avg GM per Affinity MB	Average profit generated by each affinity market basket containing both Item A and B. This includes all items in MB.
21	Avg Units per Affinity MB	Average quantity of items in each affinity market basket containing both Item A and B. This includes all items in MB.
22	% of Item A Units on Promo	Percentage of units sold in Affinity Node A that were on ad during the affinity period. This gives an indication of whether the affinity relationship exists when the items are on ad or not.
23	% of Item B Units on Promo	Percentage of units sold in Affinity Node B that were on ad during the affinity period. This gives an indication of whether the affinity relationship exists when the items are on ad or not.
24	% of Item A Sales on Promo	Percentage of sales in Affinity Node A that was associated with an ad during the affinity period. This gives an indication of whether the affinity relationship exists when the items are on ad or not.

Table 3–11 (Cont.) Standard Metrics in the Affinity Report

Metric Number	Metric	Notes
25	% of Item B Sales on Promo	Percentage of sales in Affinity Node B that was associated with an ad during the affinity period. This gives an indication of whether the affinity relationship exists when the items are on ad or not.

Audit Trail Report

Business Value

This report tracks changes made to a promotion at the user, date/time, and offer level. It also tracks changes to offers that affect the forecast including Promotion dates, promotion phase changes, edits to vehicle types, added and deleted offers, offer status changes (submissions and approvals), and any offer changes that affect the forecast (e.g. criteria, offer type, offer amount, demand drivers, forecast overrides, and position changes).

Report Prompts and Display

Select from the following options to create an Audit Trail Report:

Note: All of the following report options are optional.

1. **Select a Promotion**—select a promotion from the list of available promotions.
2. **Promotion Starting on or After**—enter a date.
3. **Promotion Ending on or Before**—enter a date.
4. **Changes Applied on or After**—enter a date.
5. **Changes Applied By**—select a user from the list of available users.
6. **Type of Change**—select the Type of Change.
7. **Object Change**—select the Object Changed.
8. Click **Run Report** to generate the report. Click **Cancel** to cancel the report.

Table 3–12 Standard Metrics in the Audit Trail Report

Metric Number	Metric	Notes
1	Promotion	Promotion Event ID.
2	Description	Promotion Description.
3	Object Type	Promotion object type that triggered the change.
4	Object Description	Description or name of the object that created the log entry.
5	User	User name that triggered the audit event.
6	Change Date	Date the event occurred.
7	Time	Time of day the audit event occurred.

Table 3–12 (Cont.) Standard Metrics in the Audit Trail Report

Metric Number	Metric	Notes
8	Action	Action type (Forecast, Insert, Delete, or Update).
9	Attribute	Name of attribute that was changed.
10	Old Value	Old field Value.
11	New Value	New Field Value.

Forecast Exception Report

Business Value

This report provides information about changes in an offer's total forecast units. The changes in the forecast could be the result of system reforecast process or a manual reforecast by any user. The system has the ability to track forecast changes by units, sales or margin (one at a time).

Report Prompts and Display

To create a Forecast Exception Report:

Note: All of the following report options are optional.

1. **Select a Promotion**—select a promotion.
2. **Promotion Starting On or After**—enter a date.
3. **Promotion Ending On or Before**—enter a date.
4. **Changes Applied On or After Date**—enter a date.
5. **Changes Applied By**—select a user from the list of available users.
6. **Variance Value**—select a variance metric from the list of available metrics. Additional, you have the option of using the following filter options:
 - **Is**—select an equation from the list of available equations.
 - **Value**—enter a value to complete the equation.
 - **Level**—Specify the output level at which the metric qualification should be calculated.
7. Click **Run Report** to generate the report. Click **Cancel** to cancel the report.

Table 3–13 Standard Metrics in the Forecast Exception Report

Metric Number	Metric	Notes
1	Promotion	Promotion Event ID.
2	Offer Name	Name of the Offer.
3	Department	Department ID and Description.
4	User	User who made a change.
5	Date	Date the change occurred.

Table 3–13 (Cont.) Standard Metrics in the Forecast Exception Report

Metric Number	Metric	Notes
6	Variance%	$[(\text{Current forecast quantity} - \text{Last forecast quantity}) / \text{Last forecast quantity}] * 100$
7	Last Forecast Units	The forecast quantity from the prior time the offer was saved.
8	Current Forecast Units	The forecast quantity from the most recent time the offer was saved.

Forecast Accuracy Report

Business Value

This report compares the system and user (if one exists) predicted forecasts from a promotion created in Promotion Planning and Optimization against the sales results within Promotion Intelligence. Analysis is done only at the event level.

Report Prompts and Display

To create a Forecast Accuracy Report:

1. **Choose an Event**—(required). Select an event from the list of available events.
2. Click **Run Report** to generate the report. Click **Cancel** to cancel the report.

Table 3–14 Standard Metrics in the Forecast Accuracy Report

Metric Number	Metric	Notes
1	Event	Event External Name at the promotion level.
2	Department	Department that includes the SKUs within the offer.
3	Start Date	Promotion Start Date.
4	Position	Page Block Position.
5	External Offer Name	Event External Name at the offer level, used to group together offers within the same promotional event.
6	Description	Offer Description.
7	Forecast Avg Ad Units Per Store	Avg units forecasted by the store within the offer.
8	User Avg Ad Units per Store	User override avg units per store.
9	Actual Avg Ad Units per Store	Average units sold per store within the offer.
10	Ad Units Variance%	Ad Units Variance
11	Forecast Ad Total Sales	Total Sales Forecast. $\text{Sum}(\text{for_base_sales} + \text{for_incr_sales})$
12	Actual Ad Total Sales	Actual Sales from transactions.
13	Ad Sales %Variance	Ad Sales Variance. $((\text{Actual} - \text{Fcst}) / \text{Fcst}) * 100$

Table 3–14 (Cont.) Standard Metrics in the Forecast Accuracy Report

Metric Number	Metric	Notes
14	Forecast Ad GM	GM Forecast
15	Actual Ad GM	Actual GM obtained from Sales transactions.
16	Ad GM %Variance	GM Variance. ((Actual - Fcst)/Fcst)*100
17	Avg Ad Unit Price	Avg Ad unit price (Price after discounts).
18	User Ad Unit Price	User override avg ad price per store.
19	Avg Regular Unit Price	Regular Price (Normal Price or Effective Price).
20	Avg Item Cost	Avg (effective_cost)
21	User Avg Item Cost	User override avg cost per store.
22	Avg Discount%	((([Ad Item Normal Price]-[Avg Ad Unit Price])/[Ad Item Normal Price])

Strategic Business Emphasis Report

Business Value

This report provides a sales and profit analysis of all groups within a given merchandise hierarchy level. It is typically run at the department level.

Report Prompts and Display

To create a Strategic Business Emphasis Report:

1. Select the relevant merchandise hierarchy, location hierarchy, and week period.
2. Click **Run Report** to generate the report. Click **Cancel** to cancel the report.

Table 3–15 Standard Metrics in the Strategic Business Emphasis Report

Metric Number	Metric	Notes
1	Week Period	Time period (in weeks).
2	Group MBs	Total group market baskets.
3	Total MBs	Total market baskets.
4	Pct Group MBs to Total MBs	Percentage of group market baskets when compared to the total market baskets.
5	Group Sales	Total group sales.
6	Total Sales	Total sales.
7	Avg Sales per MB	Average sales for each market basket.
8	Avg GroupItem Sales per MB	Average sales for the group items in
9	Pct Group Sales to Total Sales	Percentage of group sales when compared to the total sales.
10	Group Profit	Total group profit.
11	Total Profit	Total profit.

Table 3–15 (Cont.) Standard Metrics in the Strategic Business Emphasis Report

Metric Number	Metric	Notes
12	Avg Profit per MB	Average profit for each market basket.
13	Avg Profit per Group MB	Average profit for each group market basket.
14	Avg Profit per Non-group MB	Average profit for each non-group market basket.
15	Pct Group Profit to Total Profit	Percentage of group profit when compared to the total profit.
16	Total Items	Total number of items.
17	Avg Items per MB	Average number of items in each market basket.
18	Total Group Items	Total number of group items.
19	Avg Group Items per MB	Average number of group items in each market basket.
20	Avg Non-group Items per MB	Average number of non-group items in each market basket.
21	Avg Price per Item	Average price for each item.
22	Avg Price per Group Item	Average price for each group item.
23	Avg Price per Non-group Item	Average price for each non-group item.
24	Week Period	Time period (in weeks).

Metric Abbreviations

Note: The column names that display in your reports might include abbreviated terms and terms that differ from those used in this guide. This is due to the fact that, during implementation, your systems administrator can alter the metric column names to match the particular terms your company uses.

Terms in Metric Names

- The metric column headings do not use qualifiers such as “all,” “total,” “sum,” and “number.” That is because the “total” qualifier is implied if the metric is not preceded by anything less than the total. In other words, the use of the unqualified term, such as
- “MBs” or “sales,” indicates a reference to the sum of all MBs or sales considered within the report parameters.
- Conversely, if the term refers to fewer than the total number of market baskets, less sales, or other measure, it is preceded by a qualifier, such as “Ad MBs,” or “Ad Sales.”
- Averages are expressed by the construction of the metric name and the inclusion of the word “per.”
- Indexes are expressed by the inclusion of the forward slash (/) to indicate the relationship between the two values.

Table 4–1 *Metric Term Short Name*

Short Form	Long Form	Represents
+	Plus	Summed value
%	Percent	Percent
Ad	Advertised or Advertisement	Advertisement; ad event; Items that are advertised in the ad event.
Ad Item	Ad Item	An item that is in the promotion group for a specific ad event.
Ad MB	Ad Market Basket	A transaction that contains at least one advertised item.

Table 4–1 (Cont.) Metric Term Short Name

Short Form	Long Form	Represents
AI	Affinity Item	An item, usually a non-ad item, that is pulled into the market basket by an ad item.
Alloc	Allocated	Assigned or accredited.
AP	Ad Period	Duration of the ad event; range of dates in which the promotion is active.
Avg	Average	Average, the value obtained by dividing the sum of a set of quantities by the number of quantities in the set.
BP	Baseline Period	Period during which a particular item was not an ad item in a any transaction.
BP MB	Baseline Market Basket	A transaction that occurred during the baseline period; contrast with non-ad market baskets.
%Cherry Picked	Percent Cherry Picked	Number of transactions with only ad item divided by the number of all transactions with ad item. This shows the percentage of market baskets that only contain the item on ad.
Cost	Cost	Expense to the retailer.
Count	Count	Number of unique items; does not include multiples.
DI	Driver Item	Driver item or left-hand-side (LHS) item in affinity or cross-sell relationships, usually an advertised item.
Discount	Discount	Amount of percent off the full, 100 percent baseline price.
Group Item	Group Item	An item that belongs to a specific level of the product hierarchy; can indicate multiples of the same item.
Group	Group	A specific level of the product hierarchy above the lowest level (item, UPC, or SKU): department, category, division, and so on.
Group Ad MB	Group Ad Market Basket	A transaction that contains at least one ad item from a specific level of the product hierarchy.

Table 4–1 (Cont.) Metric Term Short Name

Short Form	Long Form	Represents
Group MB	Group Market Basket	A transaction that contains at least one item from a specific level of the product hierarchy.
Group Non-Ad MB	Group Non-Ad Market Basket	A transaction that contains at least one item from a specific level of the product hierarchy, but contains no ad items.
Incr	Incremental	Additional market baskets, sales, or profit realized during the ad period, compared to the baseline period.
Item	Item	Lowest level of the product hierarchy: the UPC, SKU, or store code level; specific item that is examined in the report.
Items	Items	Multiples of one or more unique items.
Item Ad MB	Item Ad Market Basket	A transaction that occurs during the ad period and includes at least one specific item that is on ad.
Item Ad GM	Item Ad Growth Margin	Profit generated by the ad item during the ad event (excluding affinity effects).
Item Ad Sales	Item Ad Sales	Sales generated by the ad item during the ad event (excluding affinity effects).
Item Base MB	Item Baseline Market Baskets	A transaction that occurs during the baseline period and that includes at least one main item; contrast with non-ad market baskets.
Item MB	Item Market Basket	A transaction that includes at least one main item.
Item Non- Ad MB	Item Non-Ad Market Baskets	A transaction that includes at least one main item, but no ad items.
MB	Market Basket	Market Basket, transaction, invoice, or visit.
Non-ad	Not advertised	Items that are not advertised or not part of the promotion group during the ad event.
Non-Ad MB	Non-Ad Market Basket	A transaction that contains no ad items; contrast with baseline market baskets.
Non-Item MB	Non-Item Market Basket	A transaction that does not contain a specific focus item.

Table 4–1 (Cont.) Metric Term Short Name

Short Form	Long Form	Represents
Other Ad Item	Other Ad Item	Any ad item other than the specific item
Other Group	Other Group	Any group other than the specific group.
Other Item	Other Item	Any item other than the specific item.
Pred	Predicted	Predicted metrics.
Price	Price	Expense to the customer.
Profit	Profit	Profit or gross margin.
Promo Grp	Promotion Group	Group of unique ad items for a specific ad event; depending on the selected parameters for the report, can be all items in the event or all items from a specific group.
Qty	Quantity	Sum of units, can include multiples of each unique item, can be integers or fractions, as in weight; contrast with count.
ROI	Return on Investment	Profit generated by the ad event expressed as a percent of (divided by) the cost of the promotion or circular.
Sales	Sales	Sales dollars or revenue collected from customers.
SI	Specific Item	An item that is the subject of the report or that is included in a particular group of items under consideration.
Unique Item	Unique Item	A distinct item; a member of the promotion group or of a specific level of the product hierarchy.

Metric Names and Definitions

Table 4–2 Metric Names and Definitions

Metric	Definition
Actual Ad GM	Actual GM obtained from sales transactions.
Actual Ad Total Sales	Actual sales from transactions.
Actual Avg Ad Units per Store	Average units sold per store within the offer.
Actual Quantity	Actual number of units sold, for all items in the selected segment.

Table 4–2 (Cont.) Metric Names and Definitions

Metric	Definition
Ad / Baseline Allocated Non-Ad Sales Index	Predicted sales generated by non-ad items during the ad event, compared to predicted sales generated by non-ad items during the baseline period; an index of 100 represents no change.
Ad / Baseline Price Index	Ad item price (or predicted ad item price) compared to baseline item price; an index of 100 represents no change.
Ad / Baseline Profit Index	Predicted profit generated by ad items compared to predicted profit generated by baseline items; an index of 100 represents no change.
Ad / Baseline Sales Index	Predicted sales generated by ad items compared to predicted sales generated by baseline items; an index of 100 represents no change.
Ad / Baseline Units Index	Number (or predicted number) of ad units sold compared to predicted number of baseline units sold; an index of 100 represents no change.
Ad / Non-Ad Market Basket Items Index	Average quantity of items in each ad market basket compared to average quantity of items in each non-ad market basket; an index of 100 represents no change.
Ad / Non-Ad Market Basket Profit Index	Average profit generated by each ad market basket compared to average profit generated by each non-ad market basket; an index of 100 represents no change.
Ad / Non-Ad Market Basket Sales Index	Average sales generated by each ad market basket, compared to average sales generated by each non-ad market basket; an index of 100 represents no change.
Ad Allocated Non-Ad Sales	Predicted non-ad sales allocated to the focus item during the ad event.
Ad Cost	Cost of ad circular for a particular ad event.
Ad Item Profit	Profit generated by the focus item during the ad event.
Ad Item Sales	Sales generated by the focus item during the ad event.
Ad Item Value Index	This is a score of the ad item's promotion effectiveness. It provides a single weighted value that takes the incremental lift of revenue, profit, and units into consideration.
Ad GM Variance%	GM Variance percentage.
Ad Sales Variance%	Ad Sales variance percentage.
Ad Units Variance%	Ad units variance percentage.
Ad Market Basket Group Items	Quantity of items from the focus group in ad market baskets; includes multiples of unique items.
Ad Market Basket Items	Quantity of ad and non-ad items sold in ad market baskets; includes multiples of unique items.
Ad Market Basket Profit	Profit generated by both ad and non-ad items in ad market baskets.
Ad Market Basket Profit Due to Group Items	Profit generated by items in the focus group in ad market baskets.
Ad Market Basket Sales	Sales generated by both ad and non-ad items in ad market baskets.
Ad Market Baskets	Count of market baskets that contained at least one ad item or at least one focus ad item.

Table 4–2 (Cont.) Metric Names and Definitions

Metric	Definition
Ad Percent of Market Basket Items	Quantity of ad and non-ad items sold in ad market baskets as a percent of quantity of ad and non-ad items sold in total market baskets.
Ad Percent of Market Basket Profit	Profit generated by ad market baskets as a percent of profit generated by total market baskets.
Ad Percent of Market Basket Sales	Sales generated by ad market baskets as a percent of sales generated by total market baskets.
Ad Percent of Market Baskets	Count of ad market baskets as a percent of count of total market basket.
Ad Price	Price (or predicted price) for the item when it is in on-ad during the ad event.
Ad Price per Item	Average price for each item in the promotion group during the ad event.
Ad Profit	Profit (or predicted profit) generated by the ad item.
Ad Sales	Sales (or predicted sales) generated by the ad item.
Ad Units	Quantity (or predicted quantity) of ad items sold within a specific region for a specific week.
Affinity Confidence	Percent of driver item market baskets that include an affinity item.
Affinity Index	A measure of the extent to which the purchase of one item leads to the purchase of another item.
Affinity Market Baskets	Count of market baskets considered for the affinity analysis.
Affinity Reverse Confidence	Affinity index that uses the cross-sell or affinity item as the driver item.
Allocated Non-ad Baseline GM	Estimated allocated baseline profit generated by Non-ad items in MB that are allocated to the promo item.
Allocated Non-ad Baseline Sales	Estimated allocated baseline sales of non-ad items during ad period.
Allocated Non-Ad GM	Total non-ad profit (baseline + incremental) allocated to the promo item.
Allocated Non-Ad GM Lift%	This metric compares ad profit by non-ad items against baseline profit allocated to the promo item. Percentage change in profit over baseline due to ad event.
Allocated Non-Ad Sales	Percentage change in allocated non-ad sales over baseline due to ad event.
Allocated Non-Ad Sales Lift%	Percentage change in allocated non-ad sales over baseline due to ad event.
Allocated Pages	Count of pages allocated to this group or item.
Avg AD Unit Price	Average price for each item during the promotion.
Avg AD Units per AD MB	Average number of items in a MB.
Avg Ad Units per Store	Average units of ad item in offer sold during the ad event.
Avg Baseline Units per Store	Average estimated baseline units, of ad items in offer, during the ad period.
Avg Discount%	Percentage savings of Ad price compared to regular price.

Table 4–2 (Cont.) Metric Names and Definitions

Metric	Definition
Avg GM per AD MB	Average profit per transaction containing ad items from the offer.
Avg GM per MB	Profit from all items in MBs that include items from the merchandise level. Includes ad/non-ad items and items not in the merchandise hierarchy level divided by the number of transactions with items from the merchandise level (regardless if the item is or not on Ad).
Avg Item Cost	Avg(effective_cost).
Avg Regular Unit Price	Average price for each item when it is not on ad.
Avg Sales per AD MB	Average sales per transaction containing ad items from the offer.
Avg Sales per MB	Sales from all items in MBs that include items from the merchandise level. Includes ad/non-ad items and items not in the merchandise hierarchy level divided by the number of transactions with items from the merchandise level (regardless if the item is or not on Ad).
Avg Units per AD MB	Average units per transaction containing ad items from the offer.
Avg Units per MB	Count of units of all items in MBs that include items from the merchandise level. Includes ad/non-ad items and items not in the merchandise hierarchy level divided by the number of transactions with items from the merchandise level (regardless if the item is or not on Ad).
Baseline Allocated Non-Ad Sales	Predicted non-ad sales allocated to the focus item during the baseline period.
Baseline Item Profit	Profit generated by the focus item during the baseline period.
Baseline Item Sales	Sales generated by the focus item during the baseline period.
Baseline Price	Item price during the baseline period.
Baseline Price	Predicted item price during the baseline period.
Baseline Price per Item	Average price for each item in the promotion group during the baseline period.
Baseline Profit	Profit (or predicted profit) generated by the focus item during the baseline period.
Baseline Sales	Sales (or predicted sales) generated by the focus item during the baseline period.
Baseline Units	Quantity (or predicted quantity) of items during the baseline period.
Break-even Pages	Count of ad pages, based on cost, that were covered by revenue generated by the ad event.
Break-even Percent of Ad Sales per Item	Average break-even point of sales generated by each unique ad item, compared to average actual sales generated by each unique ad item, expressed as a percent.
Break-even Sales per Ad Item	Average sales that each unique ad item must generate to cover the cost of the ad event (total ad cost divided by number of unique on-ad items).
Chain Level Error	Mean Absolute Percent Error calculated from chain level aggregated units sold.
Cost	Predicted item cost.
Cost for Group or Item	Cost of ad pages for a particular group, department, or item.

Table 4–2 (Cont.) Metric Names and Definitions

Metric	Definition
Cost per Page	Cost for each ad page for a particular promotion.
Difference Ad Market Basket Percent versus Market Basket Percent	Difference between the percent of all ad market baskets that contain group items and the percent of all market baskets that contain group items.
Difference Ad Profit	Difference between the actual and the predicted profit generated by the item during the ad event.
Difference Ad Sales	Difference between the actual and the predicted ad item sales during the ad event.
Difference Ad Units	Difference between the actual and the predicted quantity of ad items.
Difference Ad versus Base Units Index	Difference between the actual and the predicted item indexes.
Difference Ad versus Non-Ad Market Basket Items	Difference between average quantity of items in ad market baskets and average quantity of items in non-ad market baskets.
Difference Ad versus Non-Ad Market Basket Profit	Difference between average profit generated by each ad market basket and average profit generated by each non-ad market basket.
Difference Ad versus Non-Ad Market Basket Sales	Difference between average sales generated by each ad market basket and average sales generated by each non-ad market basket.
Difference Ad versus Non-Ad Profit Due to Ad Market Baskets	Portion of profit generated during the ad event that can be attributed to ad market baskets.
Difference Ad versus Non-Ad Profit per Market Basket	Difference between average profit generated by each ad market basket and average profit generated by each non-ad market basket.
Difference Ad versus Non-Ad Sales per Market Basket	Difference between average sales generated by each ad market basket and average sales generated by each non-ad market basket.
Difference Ad versus Non-Ad Sales per Market Basket Due to Ad Items	Portion of average sales difference that can be attributed to the ad portion of ad market baskets.
Difference Ad versus Non-Ad Sales per Market Basket Due to Non-Ad Items	Portion of average sales difference that can be attributed to the non-ad portion of ad market baskets.
Difference Base Profit	Difference between the actual and the predicted profit generated by the item during the baseline period.
Difference Base Sales	Difference between the actual and the predicted sales generated by the item during the baseline period.
Difference Base Units	Difference between the actual and the predicted quantity of baseline items.
Difference from Ad Item Profit per Market Basket	Portion of average profit difference that can be attributed to ad items.
Difference from Ad item Sales per Market Basket	Portion of average sales difference that can be attributed to the ad portion of ad market baskets.
Difference from Ad Items per Market Basket	Portion of average quantity of items difference that can be attributed to the ad portion of ad market baskets.

Table 4–2 (Cont.) Metric Names and Definitions

Metric	Definition
Difference from Non-Ad Item Profit per Market Basket	Portion of average profit difference that can be attributed to non-ad items.
Difference from Non-Ad Item Sales per Market Basket	Portion of average sales difference that can be attributed to the non-ad portion of ad market baskets.
Difference from Non-Ad Items per Market Basket	Portion of average quantity of items difference that can be attributed to the non-ad portion of ad market baskets.
Difference in Items per Ad/Non- Ad Market Basket	Difference between average quantity of items in ad market baskets and average quantity of items in non-ad market baskets.
Difference in Profit per Ad versus Non-Ad Market Basket	Difference between average profit generated by each ad market basket and average profit generated by each non-ad market basket.
Difference in Sales per Ad versus Non-Ad Market Basket	Difference between average sales generated by each ad market basket and average sales generated by each non-ad market basket.
Difference Incremental Allocated Non-Ad Sales	Difference between the actual and the predicted additional allocated non-ad sales.
Difference Incremental Sales	Difference between the actual and the predicted additional item sales.
Difference Incremental Sales plus Allocated Non-Ad Sales	Difference between the actual and the predicted additional item sales plus allocated non-ad sales.
Difference Incremental Units	Difference between the actual and the predicted quantity of additional items sold.
Discount per Item	Average difference between ad item price and baseline item price, expressed as a percent of the baseline item price.
Forecast Ad GM	GM Forecast.
Forecast Ad Total Sales	Total Sales Forecast.
Forecast Avg Ad Units per Store	Avg units forecasted by the store within an offer.
Group Ad Market Basket Percent of Group Market Baskets	Count of ad market baskets that contain an item from the focus group as a percent of all market baskets that contain group items.
Group Ad Market Baskets	Count of ad market baskets that contain an item from the focus group.
Group Item Profit	Profit generated by items from the focus group.
Group Item Profit per Market Basket	Average profit generated by focus group items in each market basket.
Group Item Sales	Sales generated by items from the focus group.
Group Item Sales per Market Basket	Average sales generated by items in the focus group for each market basket.
Group Items	Quantity sold of items in the focus group; can include multiples of unique items.
Group Items per Market Basket	Average quantity of focus group items in each market basket

Table 4–2 (Cont.) Metric Names and Definitions

Metric	Definition
Group Market Basket Profit	Profit generated by market baskets that contain an item from the focus group.
Group Market Basket Sales	Sales generated by market baskets that contain an item from the focus group.
Group Market Baskets	Count of market baskets that contained an item from the focus group.
Group Non-Ad Market Baskets	Count of market baskets that contained an item from the focus group, but no ad items.
Group Percent of Ad Items	Quantity sold of ad items from the focus group as a percent of total quantity of ad items.
Group Percent of Ad Market Basket Profit	Profit generated by items in the focus group in ad market baskets as a percent of profit generated by total ad market baskets.
Group Percent of Ad Market Basket Sales	Sales generated by items in the focus group in ad market baskets as a percent of sales generated by total ad market baskets.
Group Percent of Items	Quantity sold of items from the focus group as a percent of total quantity of items.
Group Percent of Market Basket Profit	Profit generated by items in the focus group as a percent of total profit.
Group Percent of Market Baskets	Count of market baskets that contain an item from the focus group as a percent of count of total market baskets.
Group Percent of Profit	Profit generated by items from the focus group as a percent of total profit generated by market baskets.
Group Percent of Report Level Profit	Profit generated by items from the focus group as a percent of profit reported at this level.
Group Percent of Report Level Sales	Sales generated by items from the focus group as a percent of sales reported at this level.
Group Percent of Sales	Sales generated by items in the focus group as a percent of total sales.
Incremental Allocated Non-Ad GM	Additional non-ad profit above baseline allocated to the promo item.
Incremental Allocated Non-Ad Profit	Additional profit generated by non-ad items, allocated to the focus item or group.
Incremental Allocated Non-Ad Profit per Incremental Market Basket	Average additional profit generated by non-ad items that are allocated to the focus item, in each additional market basket.
Incremental Allocated Non-Ad Sales	Additional (or predicted additional) non-ad sales allocated to the focus item, measured from the baseline period to the ad event.
Incremental Allocated Non-Ad Sales	Additional non-ad sales, allocated to the focus item or group.
Incremental Allocated Non-Ad Sales per Incremental Market Basket	Average additional sales generated by non-ad items that are allocated to the focus item, in each additional market basket.
Incremental Item GM	Additional profit generated by the ad item as a result of the ad event compared with the baseline.
Incremental GM Lift%	$[(\text{Total Incr GM} / \text{Item Baseline GM}) + \text{Allocated Non-ad Baseline GM}] * 100$

Table 4–2 (Cont.) Metric Names and Definitions

Metric	Definition
Incremental Item Market Baskets	Additional count of market baskets that contain the item, measured from the baseline period to the ad event.
Incremental Item plus Allocated Non-Ad Profit	Additional profit generated by the item plus additional profit generated by non-ad items and allocated to the focus item, measured from the baseline period to the ad event.
Incremental Item plus Allocated Non-Ad Profit per Page	For each ad page, additional or incremental focus item or group profit plus non-ad profit allocated to the focus item or group, measured from the baseline period to the ad event.
Incremental Item plus Allocated Non-Ad Sales	Additional sales generated by the item plus additional non-ad sales allocated to the item, measured from the baseline period to the ad event.
Incremental Item plus Allocated Non-Ad Sales per Page	For each ad page, additional focus item or group sales and additional non-ad sales allocated to the focus item or group, measured from the baseline period to the ad event.
Incremental Item plus Non-Ad Sales	Additional sales generated by the item plus additional non-ad sales, measured from the baseline period to the ad event.
Incremental Item Profit	Additional profit generated by the focus item or group, measured from the baseline period to the ad event.
Incremental Item Sales	Additional sales generated by the focus item, measured from the baseline period to the ad event.
Incremental Market Baskets	Additional count of market baskets that contain at least one focus item from the group, measured from the baseline period to the ad event.
Incremental Non-Ad Profit	Additional profit generated by additional non-ad items, measured from the baseline period to the ad event.
Incremental Non-Ad Sales	Additional sales generated by additional non-ad items, measured from the baseline period to the ad event.
Incremental Profit	Predicted additional profit generated by the focus item, measured from the baseline period to the ad event.
Incremental Profit per Unit of Ad Cost	Average additional profit realized for each dollar or other monetary unit of advertising cost.
Incremental Sales	Additional (or predicted additional) sales generated by the focus item, measured from the baseline period to the ad event.
Incremental Sales Lift%	$[(\text{Total Incremental Sales} / \text{Item Baseline Sales}) + \text{Allocated Non-ad Baseline Sales}] * 100$
Incremental Sales plus Allocated Non-Ad Sales	Additional sales generated by the item plus additional non-ad sales allocated to the item, measured from the baseline period to the ad event.
Incremental Units	Additional (or predicted additional) quantity of items sold, measured from the baseline period to the ad event.
Item Ad / Baseline Market Basket Index	Count of item ad market baskets compared to count of item baseline market baskets; an index of 100 represents no change.
Item Ad Market Basket Profit	Profit generated by the focus items in ad market baskets.
Item Ad Market Basket Sales	Sales generated by the focus items in ad market baskets.
Item Ad Market Baskets	Count of ad market baskets that contain at least one focus item.
Item Ad GM Lift%	Percentage change in profit over baseline due to ad event.

Table 4–2 (Cont.) Metric Names and Definitions

Metric	Definition
Item Ad Sales Lift%	Comparison of sales by ad item against baseline sales. Percentage change in sales over baseline due to ad event.
Item Baseline GM	Estimated baseline profit generated by the ad item during the ad period.
Item Baseline Market Baskets	Count of baseline market baskets that contain the item.
Item Baseline Sales	Estimated baseline sales generated by the ad item during the ad period.
Item MB Count Lift%	Count of item ad transactions compared to estimated baseline transactions. Percentage in change over baseline due to ad event.
Item Market Basket Percent of Ad Market Baskets	Count of ad market baskets that contained the focus item as a percent of total ad market baskets.
Item Sales per Ad Market Basket	Average sales generated by the focus item for each ad market basket.
Items per Ad Market Basket	Average quantity of items or focus items in each ad market basket.
Items per Market Basket	Average quantity of items in each market basket.
Items per Non-Ad Market Basket	Average quantity of items in each non-ad market basket.
Market Basket Items	Quantity of items sold across all market baskets; includes multiples of unique items.
Market Basket Profit	Profit generated by all market baskets.
Market Basket Sales	Sales generated by all market baskets.
Market Baskets	Count of market baskets.
No Other Percent of Item Ad Market Baskets	Percent of all item market baskets that contained no other ad items other than the focus item.
Non-Ad Market Basket Items	Quantity of items sold in non-ad market baskets; includes multiples of unique items.
Non-Ad Market Basket Sales	Sales generated by non-ad market baskets.
Non-Ad Market Baskets	Count of market baskets that contained no ad items.
Non-Ad Percent of Market Basket Items	Quantity of items sold in non-ad market baskets as a percent of quantity of ad and non-ad items sold in total market baskets.
Non-Ad Percent of Market Basket Profit	Profit generated by non-ad market baskets as a percent of profit generated by total market baskets.
Non-Ad Percent of Market Basket Sales	Sales generated by non-ad market baskets as a percent of sales generated by total market baskets.
Non-Ad Profit	Profit generated by non-ad market baskets.
Non-Ad Sales	Sales generated by non-ad market baskets.
Other Ad Items per Item Market Basket	Average quantity of ad items other than focus items, included in item market baskets.
Other Ad Market Basket Profit	Profit generated by items other than the focus item, in ad market baskets; can include other ad items.
Other Ad Market Basket Sales	Sales generated by items other than the focus item, in ad market baskets; can include other ad items.

Table 4–2 (Cont.) Metric Names and Definitions

Metric	Definition
Other Items per Ad Market Basket	Average quantity of items other than focus items, in each ad market basket.
Other Items per Group Market Basket	Average quantity of items that are not in the focus group in each market basket.
Other Percent of Group Market Basket Sales	Sales generated by items that are not in the focus group as a percent of sales generated by group market baskets.
Other Percent of Market Basket Profit	Profit generated by items that are not in the focus group as a percent of profit generated by total market baskets.
Other Profit per Ad Market Basket	Average profit generated by items other than focus items, in each ad market basket.
Other Profit per Market Basket	Average profit generated by items not in the focus group for each market basket.
Other Sales per Ad Market Basket	Average sales generated by items other than focus items, in each ad market basket.
Other Sales per Market Basket	Average sales generated by items not in the focus group for each market basket.
Pages	Count of pages in ad circular.
Pages Allocated from Profit	Count of pages allocated to this group, based on group item profit plus allocated non-ad profit, regardless of circular size.
Pages Allocated from Profit - 24 Pages	Count of pages allocated to this group, based on group item profit plus allocated non-ad profit, based on a 24-page circular.
Pages Allocated from Sales	Count of pages allocated to this group, based on group item sales plus allocated non-ad sales, regardless of circular size.
Pages Allocated from Sales - 24 Pages	Count of pages allocated to this group, based on group item sales plus allocated non-ad sales, based on a 24-page circular.
Percent Difference Actual versus Predicted Units Index	Difference between the actual and the predicted item indexes, as a percent of the actual items index.
Percent Difference Ad Profit	Difference between the actual and the predicted profit generated by the item, as a percent of the actual ad item profit.
Percent Difference Ad Sales	Difference between the actual and the predicted ad item sales, as a percent of the actual item sales.
Percent Difference Ad Units	Difference between the actual and the predicted number of ad items, as a percent of the total number of actual items sold.
Percent Difference Base Profit	Difference between the actual and the predicted profit, as a percent of the actual baseline item gross margin.
Percent Difference Base Sales	Difference between the actual and the predicted item sales, as a percent of the actual baseline item sales.
Percent Difference Base Units	Difference between the actual and the predicted quantity of baseline items, as a percent of the actual total quantity of items sold during the baseline period.
Percent Difference Incremental Allocated Non-Ad Sales	Difference between the actual and the predicted additional allocated non-ad sales, as a percent of the actual additional allocated non-ad sales.
Percent Difference Incremental plus Allocated Non-Ad Sales	Difference between the actual and the predicted additional item sales plus allocated non-ad sales, as a percent of the actual additional item plus allocated non-ad sales.

Table 4–2 (Cont.) Metric Names and Definitions

Metric	Definition
Percent Difference Incremental Sales	Difference between the actual and the predicted additional item sales, as a percent of the actual additional item sales.
Percent Difference Incremental Units	Difference between the actual and the predicted quantity of additional items sold, as a percent of the actual total quantity of additional items.
Predicted Ad / Baseline Price Index	Predicted ad item price compared to predicted baseline item price; an index of 100 represents no change.
Predicted Ad / Baseline Units Index	Predicted quantity of ad items compared to predicted quantity of baseline items; an index of 100 represents no change.
Predicted Ad Price	Predicted price of the ad item.
Predicted Ad Profit	Predicted profit generated by the ad item.
Predicted Ad Sales	Predicted sales generated by the ad item.
Predicted Ad Units	Predicted quantity of ad items.
Predicted Baseline Price	Predicted item price during the baseline period.
Predicted Baseline Profit	Predicted profit generated by the focus item during the baseline period.
Predicted Baseline Sales	Predicted sales generated by the focus item during the baseline period.
Predicted Baseline Units	Predicted quantity of items during the baseline period.
Predicted Cost	Predicted item cost.
Predicted Incremental Allocated Non-Ad Sales	Predicted additional non-ad sales allocated to the focus item, measured from the baseline period to the ad event.
Predicted Incremental Item Sales	Predicted additional sales generated by the focus item, measured from the baseline period to the ad event.
Predicted Incremental Item Sales plus Predicted Allocated Non-Ad Sales	Predicted additional item sales plus allocated non-ad sales, measured from the baseline period to the ad event.
Predicted Incremental Units	Predicted quantity of additional items, measured from the baseline period to the ad event.
Predicted Quantity	Predicted number (generated by the model) of units sold.
Price per Group Item	Average price for each item in the focus group.
Price per Item	Average price for each item in the market basket.
Price per Other Item	Average price for each item that is not in the focus group.
Profit after Ad Cost	Net profit for a particular ad event after costs of the ad circular are deducted.
Profit per Ad Market Basket	Average profit generated by each ad market basket.
Profit per Affinity Market Basket	Average profit generated by each affinity market basket.
Profit per Market Basket	Average profit generated by each market basket.
Profit per Non-Ad Market Basket	Average profit generated by each non-ad market basket.
Profit per Page	Average profit generated by each ad page for a particular ad event after costs of the ad circular are deducted.

Table 4–2 (Cont.) Metric Names and Definitions

Metric	Definition
ROI	Net profit for a particular ad event as a percent of the cost of the ad circular.
Sales	Sales generated by all market baskets.
Sales per Ad Market Basket	Average sales generated by each ad market basket.
Sales per Affinity Market Basket	Average sales generated by each affinity market basket.
Sales per Item Ad Market Basket	Average sales generated by each ad market basket.
Sales per Market Basket	Average sales generated by each market basket.
Sales per Non-Ad Market Basket	Average sales generated by each non-ad or group non-ad market basket.
Sales per Unique Ad Item	Average sales generated by each, unique, on-ad item.
Store Level Error	Total of Mean Absolute Percent Error calculated at the item/store level.
Total Ad Units	Total units of ad items in offer sold during the ad event.
Total Growth Margin (Ad + Non-Ad)	Profit generated by the item as a result of the ad including the incremental non-ad profit allocated to the promo item.
Total Sales (Ad + Non-Ad)	Total sales generated by the item as a result of the ad event including the incremental non-ad sales allocated to the item.
Total Incremental Sales	Additional sales during ad event, of the ad item plus additional non-ad sales allocated to the ad item, compared to estimated baseline sales.
Total Incremental GM	Additional profit during ad event, of the ad item plus additional profit generated by non-ad items allocated to the ad item, compared to estimated baseline profit.
Total Value Index	This is a score of the overall promotion effectiveness of an ad item including its impact on allocation non-ad performance. It provides a single, weighted value that takes the incremental lift of revenue, profit, and units of the ad item and non-ad items into consideration.
Unique Ad Items	Count of unique items on ad.
Unique Affinity Items	Count of unique affinity items that tend to sell with the driver item.
Unique Driver Items	Count of unique driver items.
Unique Group Items	Count of unique items in a specific level of the product hierarchy.
Units per Ad Market Basket	Average quantity of focus items and other items sold, in each ad market basket.
Units per Affinity Market Basket	Average quantity of items in each affinity market basket.
User Ad Unit Price	User override of avg cost per store.
User Avg Ad Units per Store	User override avg units per store.
User Avg Item Cost	User override avg cost per store.

