

Oracle® Retail Promotion Intelligence

User Guide

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

Customer Support

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

When contacting Customer Support, please provide:

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

Review Patch Documentation

For a base release ("0" release, such as 13.0), Oracle Retail strongly recommends that you read all patch documentation before you begin installation procedures. Patch documentation can contain critical information related to the base release, based on new information and code changes that have been made since the base release.

Oracle Retail Documentation on the Oracle Technology Network

In addition to being packaged with each product release (on the base or patch level), all Oracle Retail documentation is available on the following Web site:

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

Documentation should be available on this Web site within a month after a product release. Note that documentation is always available with the packaged code on the release date.

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, and time hierarchies, your 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 the 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, ready for export 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 this 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 this 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 for a report. If the range is too great—over a period of a year, for instance—retailers who deal in seasonal goods discover that market baskets (or 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 best.

Ad Events and Promotion History Information about ad events, their versions, and their history also is 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, 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. The implementation engineer 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 “Select Display and Other Options” for more details. It is important to remember, also, that not all metrics are available in every report type. For these reasons, the sample report information provided in this book probably does not look exactly like the information you see in your own reports. The following chapters and Appendix A list the complete names of the metrics that are used in Promotion Intelligence reports. However, 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 “Metric Definitions.”

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 comma separator between hundreds and thousands.
- 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.

Choosing the Right Report

To select the appropriate report, use these general steps:

1. Identify the report that provides the information you want. There are several ways to do this.
 - Identify the business question and identify one or more reports that provide the information you need.
 - Identify the general category of information. Review the appropriate chapter of this guide to find the reports you need. Reports are grouped into these chapters: "General Trends," "Product Categories," and "Individual Products."
2. Select the particular filters that can provide the most focused results.
3. Select a "Page By" preference, if available, to view the results in logical sections.
4. Run the report.
5. Assess the report results.
6. Determine a course of action to address the issue.

Business Questions and Answers

Many of the business questions about advertising are listed, below. Beside each question is the name of the Promotion Intelligence report that provides the answer.

- Ad Page Allocation - What are the best products or product categories to include in the circular, and how much emphasis should each product or category receive?
- Advertising ROI - What was the return on my advertising investment for this ad event?
- Promotion Scorecard - What is the effect of each product or product category, on the average size of each market basket and on the entire ad event?
- Strategic Ad Emphasis - What areas experience the greatest improvement when advertised and what areas need support through other means?
- Strategic Business Emphasis - What areas require an increased amount of emphasis and what areas should have a decreased amount of emphasis in the circular?
- Top Affinities - What are the best (only the top) cross-sell items for a specific item I want to promote and what items sell with a specific item, even if they are not put on ad?
- All Affinities - What are the cross-sell items for a specific item I want to promote and what items sell with a specific item, even if they are not put on ad?

Getting Started

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

Access Promotion Intelligence

You can view Promotion Intelligence reports through your Web browser.

1. To select and run a report, select the URL for Promotion Intelligence.
2. To log on, enter your user name and password in the appropriate field.
3. Click the Reports button.
4. Enter your username and password in the appropriate fields.
5. Click **Login**. The reporting home page opens.

The Reporting Home Page

The Promotion Intelligence home page provides the following options:

1. Shared Reports —browse a list of prepared reports available to all users.
2. My Reports —view reports you previously created and saved.
3. Create Reports —create and publish a new report. This option is available if you have permissions to create reports.
4. History List —view an up to date summary of the status of your report requests.
5. Preferences —alter the general setting for displaying reports and access formatting options for other features.
6. Help —access help with the Microstrategy interface.
7. 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 following reports are available:

1. Affinity —this report provides information about the affinity products or items that tend to sell with other items. It displays all of the affinity rules produced by the Analytical Relationship Management (ARM) application.
2. Event Scorecard by Item —this report provides an analysis of the effect that individual Sub-classes have on the success of particular events.
3. Event Scorecard by Class —this report provides an analysis of the effect that individual classes have on the success of particular events.
4. Event Scorecard by Sub-class —this report provides an analysis of the effect that individual Subclasses have on the success of particular events.
5. Event Scorecard by Offer/Department —this report provides an analysis of the effect that each offer has on the success of particular events.

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. Use the vertical scroll bar to select filters for the report.
2. Use the left and right arrows to move a filter into the selected block.
3. To process the report, select **Run Report**. The report status view appears while the report processes.
4. During processing, you can click onto one of the available buttons to:
 - Check the status of your report request.
 - Add the request status to your history list.
 - Cancel the report request.

Once processing is complete, the reports displays. The default format for reports is a 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. Click the print icon. The print options window opens.
2. Select the appropriate options, and click the Show Printable Version button. The window opens and displays the report as it will appear in printed form.

3. From the main menu bar above the displayed report, select File, then select Print. The print dialog box opens.
4. Select the printer, if necessary.
5. Click OK to print the report.

Exporting Report Results

Use the following steps to export a completed report.

1. To make report results available to other applications, click the export icon. The export options window opens.
2. Select the options you desire.
3. Click the Export button. The exported report displays in the format you selected.

Saving Reports

After you process a report, you can save the report format and use it again, as new data becomes available.

1. To save the report, click the save icon. The saving options window opens. The default folder for saved reports is My Reports. The field below it displays the names of all reports that currently are saved in the folder.
2. To create a new folder for saved reports, type the name of the folder in the field labeled Create folder.
3. Type a description of the folder in the field that appears below the Create folder field.
4. Click the Create Folder button. The new folder name displays in the first field. The standard report name, such as Advertising ROI, is the default report name. You can change the name of the saved report, if you wish.
5. Type a new name for the report in the field in the upper right corner.
6. Type a description of the report in the Description field.
7. You can save the report with the same filters you applied previously, or you can save it with filter and prompt options. Indicate your choice by selecting one of the circles below Save prompt.
8. Click the Save button.
9. Click the Continue button to return to the report view.

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

1. To view more details about report data, move the mouse cursor over one of the hyperlinks, and click. The new level appears on the window. If complex drilling is enabled for your user account, you can drill multiple locations within your data.

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

2. If this feature is enabled:
 - Select an option from the Drill drop-down fields in the top of the window.
 - Click the Go icon.
3. Drill on a column heading or any other hyperlinks (underlined text) by clicking the text.

Applying Additional Filters

After you process a report, you can change the parameter, or filter choices you made previously, before you submitted the report.

1. To do this, select the Filters tab.
2. Select the checkbox beside the elements you want to keep.
3. Click the Filters button. The filters limit the amount of data returned and pinpoint the measurement, date, geography, or other attributes you select.
4. To view report data for a single metric, select from the Metrics drop-down field, and click the Go icon.
5. To filter report data on a different attribute, select from the filter drop-down fields (under the Metrics field) and click the Go icon. When processing is complete, the filtered results display.
6. To produce another report of the same type, but with different filters, click the Reset Prompts icon. The report prompts page displays.
7. Select the new prompts.
8. Submit the report.

Other Display Options

The Preferences tab enables you to alter the display of the completed reports. From this page, you can change user preferences and project display. Some of the things you can do from the Preferences tab are listed, below.

- 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 the existing filters.

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

To begin, select **Create Report** from the Promotion Intelligence home page.

Using the Report Wizard

1. To use existing templates and filters, click on Report Wizard. The Report Wizard opens and enables you to choose a template and filter for your report.
2. To select a template:
 - 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.

3. To select filters:
 - Scroll to the lower portion of the Report Wizard.
 - 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.
4. Click the **Run Report** button. Depending on the template and the filter you selected, other option pages might open.
5. Select the appropriate items.
6. Click the Run Report button, again.

When processing is complete, the report results display.

Using the Report Builder

1. To create new formats, select the Report Builder.
2. In the Report Builder window, to select at least one attribute:
 - Highlight the attribute.
 - 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.

3. To select one or more metrics for the report:
 - a. Highlight the metric.
 - b. Click the right arrow to move it into the Selected block.
4. To select qualifiers, or additional filters for the attributes:
 - a. Click the down arrow.
 - b. Select the appropriate qualifier.
 - c. Click the right arrow to move it into the Selected block.
5. In the same manner, continue to select the appropriate filters.
6. To add a qualifier (such as “greater than”) to a metric:
 - a. Highlight the metric.
 - b. Select the appropriate qualifier from the drop-down list.
 - c. Type the qualifying number in the Value field.
7. Click the right arrow to move the qualifier to Selected block. The metric, qualifier, and value display in the block.
8. Click **Run Report** to process the report.

Note: Additional information about how to use the interface is included in the MicroStrategy product documentation.

General Trend Reports

This Promotion Intelligence report enables you to review the overall success of all ad events that occurred during a specific period of time. You can use it to compare overall performance during different weeks, months, quarters, and so on, and to discover the actual return on your ad investment for each period of time.

Report Formats

Most of the illustrations in this guide are simple, unadorned grid views. This plain format works well with the text and graphics that are required in order to highlight specific parts of the reports. The actual reports that display on your computer monitor feature the colors and fonts that are appropriate to the product's graphic user interface.

Advertising ROI Report

Business Value

This report provides an analysis of the return on investment (ROI) by ad events and location.

Report Prompts and Display

The report setup prompts you to select at least one of the promotion periods available (required). The resulting report displays row of metrics for each location associated with the ad event.

Table 3–1 Standard Advertising ROI Report Metrics

Metric Number	Metric	Value	Notes
1	Promotion	Circular w/e 02-14-2004 Items: 8 Pages:4 Cost: 1000	
2	Location	POLARIS TOWNE CENTER	
3	MB Sales	\$51,321.85	This value represents the total amount of sales reported by the POS. This total is calculated for the period of time when the promotion was in effect.
4	ROI	1633%	Return of Investment
5	Promotion Location Cost	\$333.33	Promotion cost by Location.
6	Net Profit After Cost	\$5,442.01	Total profit at this location minus the promotion cost per store.
7	Net Profit per Page	\$1,360.50	Net Profit (after cost) per page by location
8	MBs	597	Total number of transactions.
9	Ad MBs	271	Total number of transactions that include an Ad item for this promotion/location.
10	Non-ad MBs	326	Total number of transactions that does not include an Ad item for this promotion/location
11	Pct. of Ad MBs	45.39%	Count of ad market baskets as a percent of count of total market baskets (Metric 9 / Metric 8)
12	Ad MB Sales	\$39,022.85	Total sales generated by MB containing at least a single Ad item. (Ad MB)
13	Non-ad MB Sales	\$12,299.00	Total Non Ad MB Sales
14	Pct. of Ad MB Sales	76.04%	Sales generated by ad market baskets as a percent of sales generated by total market baskets (Metric 12/ Metric 3)
15	Avg. Sales per Ad MB	\$144.00	Average sales generated by each ad market basket (Metric 12 / Metric 9)

Table 3–1 (Cont.) Standard Advertising ROI Report Metrics

Metric Number	Metric	Value	Notes
16	Avg. Sales per Non-ad MB	\$37.73	Average sales generated by each non-ad market basket (Metric 13 / Metric 10)
17	Diff. Avg. Ad MB Sales v. Avg. Non-ad MB Sales	\$106.27	Difference between average sales generated by each ad market basket and average sales generated by each non-ad market basket (Metric 15 - Metric 16)
18	Ad MB Ad Sales	\$35,249.85	Sales by Ad Items within Ad MBs
19	Ad MB Non Ad Sales	\$3,773.00	Sales by nonAd Items within Ad MBs
20	Sales Diff. from Ad Items	\$95.99	Portion of average sales difference that can be attributed to the ad portion of ad market baskets (Metric 17) * (Metric 18 / Metric 12)
21	Sales Difference from Non-ad Items	\$10.27	Portion of average sales difference that can be attributed to the non-ad portion of ad market baskets (Metric 17) * (Metric 19 / Metric 12)
22	Ad MB Total Profit	\$10,887.35	Profit generated by Ad MB
23	Non-ad MB Total Profit	\$6,149.50	Profit generated by Non-ad MB
24	Diff. Avg. Ad MB Profit v. Avg. Non-ad MB Profit	\$21.31	Difference between average profit generated by each ad market basket and average profit generated by each non-ad market basket (Metric 22 / Metric 9) - (Metric 23 / Metric 10)
25	Additional Profit Due to Ad MBs	\$5,775.34	Portion of profit generated during the ad event that can be attributed to ad market baskets (Metric 24 * Metric 9)
26	Incremental Profit per Unit of Ad Cost	\$16.33	Average additional profit realized for each dollar or other monetary unit of advertising cost (Metric 6 / Metric 5)
27	Breakeven Number of Ad Pages	65	Number of pages that could be covered by the profit generated by the promotion Metric 6 / (Metric 5 / Promotion Pages)

Table 3–1 (Cont.) Standard Advertising ROI Report Metrics

Metric Number	Metric	Value	Notes
28	Avg. MB Sales per Ad Item	\$6,415.23	Average sales generated by each, unique, on-ad item (Metric 3 /Items on promotion)
29	Breakeven Sales per Ad Item	\$41.67	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) Metric 5/Number of Items in promotion
30	Pct. Sales Increase per Ad Item	99.35%	Percentage of sales generated by ad market baskets (Metric 3 - Metric 5)/Metric 3
31	Ad Cost per Page	\$83.33	Cost per ad page for a particular promotion Promotion Location Cost/Pages in Circular (Metric 5 / Pages)

Product Category Reports

You can use Promotion Intelligence reports to evaluate the performance of different product categories in your ad events. You can determine a strategy for each item in each category. This strategy can include things such as the choice of items to promote, their promotion price, and their promotion offer. You can also determine which items you should not promote and replace them with others that can improve the revenue generated by the ad event. Some of the reports that support these efforts are explained in this chapter:

- Ad Page Allocation

Report Formats

Most of the illustrations in this guide are simple, unadorned grid views. This plain format works well with the explanatory text boxes that are required in order to highlight specific parts of the reports. The actual reports that display on your computer monitor feature the colors and fonts that are appropriate to the product's graphic user interface.

Ad Page Allocation Report

Business Value

Ad Page Allocation report provides an analysis of the impact of page allocation on your ROI. This information enables you to determine whether a department or product group should have a larger or a smaller portion of the circular, in order to impact revenue favorably.

Report Prompts and Display

The report runs and then it will allow you to select from the promotion periods available (one at a time) The resulting report displays the category (or item) name or other ID for each row of metrics. You can page through the results by ad event or ad version.

Table 4–1 Standard Metrics in the Ad Page Allocation Report

Metric Number	Metric	Value	Notes
1	Promotion	Circular 13	
2	Focus Item	Barbie & Accessories	
3	Incremental MB Count	2,271	Additional MB that contain at least one focus item from the group. Measured from the baseline period to the promotion
4	Incremental Sales	\$134,163.98	Additional sales generated by the focus item. Measured from the baseline period to the promotion
5	Incremental Profit for Item	\$2,949.57	Additional profit generated by the focus item. Measured from the baseline period to the promotion
6	Incremental Allocated Non-ad Sales	\$251,247.50	Additional non-ad sales, allocated to the item or group
7	Incremental Allocated Non-ad Profit	\$125,623.75	Additional profit generated by non-ad items, allocated to the item or group
8	Incremental Sum of Ad Item Sales and Non-ad Item Sales	\$385,411.48	Additional sales generated by the item plus additional non-ad sales allocated to the item, measured from the baseline period to the ad event
9	Incremental Sum of Ad Item Profit and Allocated Non-ad Profit	\$139,875.40	Additional profit generated by the item plus additional profit generated by non-ad items and allocated to the item, measured from the baseline period to the ad event
10	Promotion Total Cost	\$1,000.00	Cost of ad circular for a particular ad event
11	Number of Pages	4	Number of pages in the circular
12	Pct. Page Allocation	0.00%	Space allocated by promotion items
13	Number of Pages with Group Items	0	Number of pages based on % page allocation Metric 11 * Metric 12
14	Cost per Page	\$250.00	Cost for each ad page for a particular promotion Metric 10/ Metric 11

Table 4–1 (Cont.) Standard Metrics in the Ad Page Allocation Report

Metric Number	Metric	Value	Notes
15	Ad Cost	\$0.00	Cost of ad circular for a particular ad event Metric 14 * Metric 13
16	Incremental Allocated Non-ad Profit per Page	\$0.00	For each ad page, additional non-ad profit allocated to the item or group, measured from the baseline period to the ad event Metric 7 / Metric 13
17	Incremental Allocated Non-ad Sales per Page	\$0.00	For each ad page, additional non-ad sales allocated to the item or group, measured from the baseline period to the ad event Metric 6/ Metric 13
18	Recommended Page Allocation Based on Sales for 1 Page	1	Count of pages allocated to this group, based on group item sales plus allocated non-ad sales, based on a 1-page circular
19	Recommended Page Allocation Based on Profit for 1 Page	1	Count of pages allocated to this group, based on group item profit plus allocated non-ad profit, based on a 1-page circular

Reports on Individual Products

You can use Promotion Intelligence reports to evaluate the performance of individual products in your ad events or for a specific period of time. You then can determine a strategy for each item, a strategy that can include things such as the choice of items to promote, their promotion price, and their promotion offer. You can also determine which items you should not promote and replace them with others that can improve the revenue generated by the ad event. Some of the reports that support these efforts are explained in this chapter:

- [Event Scorecard By Item Report](#) on page 5-1
- [Event Scorecard By Offer/Department Report](#) on page 5-5
- [Event Scorecard By Class Report](#) on page 5-9
- [Event Scorecard By Sub-Class Report](#) on page 5-12
- [Event Scorecard by Department/Offer Amount](#) on page 5-16
- [Event Scorecard by Class/Offer Amount](#) on page 5-20
- [Event Scorecard by Subclass/Offer Amount](#) on page 5-24
- [Overlapping SKUs](#) on page 5-28
- [Affinity Report](#) on page 5-30
- [Affinity \(Pull\)](#) on page 5-32
- [Audit Trail Report](#) on page 5-35
- [Forecast Exception Report](#) on page 5-36

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 Sub-classes 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. Choose an Event—required.
2. Select an attribute from the Merchandise Hierarchy—optional.
3. Click **Run Report** to create the report.

Table 5–1 Event Scorecard by Item Report Metrics

MetricNumber	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 promotion
3	Position	Page number, position number.
4	Offer	Offer Name.
5	Ad Item	Description and id of item on promo.
6	Dept	Department id and description of dept shown in 2 separate columns.
7	Class	Class id and description of class shown in 2 separate columns.
8	Sub-class	Sub-class id and description of subclass shown in 2 separate columns.
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].

Table 5–1 (Cont.) Event Scorecard by Item Report Metrics

MetricNumber	Metric	Notes
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. $\left[\frac{\text{Incr Item MB Count}}{\text{Item Baseline MB Count}} \right] * 100$
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%	$\left[\frac{\text{Total Incr Sales}}{\text{Item Baseline Sales} + \text{Allocated Non-ad Baseline Sales}} \right] * 100$
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. $\text{Incr Item GM} + \text{Incr Allocated Non-ad GM}$
16	Incr GM Lift%	$\left[\frac{\text{Total Incr Sales}}{\text{Item Baseline Sales} + \text{Allocated Non-ad Baseline Sales}} \right] * 100$
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. $\text{Item Ad Sales} - \text{Item Baseline Sales}$
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. $\left[\frac{\text{Incremental Item Sales}}{\text{Item Baseline Sales}} \right] * 100$

Table 5–1 (Cont.) Event Scorecard by Item Report Metrics

MetricNumber	Metric	Notes
21	Allocated Non-ad Sales	Total non-ad sales (baseline + incremental) allocated to the ad item.
22	Incr Allocated Non-ad Sales	Additional non-ad sales above baseline allocated to the ad item.
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.
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
28	Allocated Non-ad GM	Total non-ad profit (baseline + incremental) allocated to the promo item.
29	Incr Allocated Non-Ad GM	Additional non-ad profit above baseline allocated to the promo item.
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 [Avg. Regular Unit Price - Avg. Ad Unit Price] / Avg. Regular Unit Price
34	Allocated Non-ad Baseline Sales	Estimated allocated baseline sales of non-ad items during ad period.

Table 5–1 (Cont.) Event Scorecard by Item Report Metrics

MetricNumber	Metric	Notes
35	Allocated Non-ad 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.
36	Allocated Non-ad Baseline GM	Estimated allocated baseline profit generated by Non-ad items in MB that are allocated to the promo item.
37	Allocated Non-ad 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.
38	Avg Ad Units per Store	Average units of ad item in offer sold during the ad event.
39	Avg Baseline Units per Store	Average estimated baseline units of ad items in offer during the ad period.
40	Total Ad Units	Total units of ad items in offer sold during the ad event.
41	Baseline Units	Estimated baseline units of ad items in offer during the ad period.
42	Ad Units Lift%	$(\text{Total Ad Units} - \text{Baseline Units}) / \text{Baseline Units}$
43	%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.

Event Scorecard By Offer/Department 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. Choose from all elements of an Event—required.

2. Choose from all elements of a Department—optional.
3. Click **Run Report** to create the report.

Table 5–2 Event Scorecard by Offer/Department Report Metrics

MetricNumber	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 promotion.
3	Position	Page number, position number
4	External Offer Name	Offer Name.
5	Description	Description of offer.
6	Dept	Department id and description of dept shown in 2 separate columns. Available on all scorecard reports.
7	Item Ad MB Count	Count of ad transactions that contain at least one unit of the ad item.
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%	$[(\text{Total Incr Sales} / \text{Item Baseline Sales} + \text{Allocated Non-ad Baseline Sales}) * 100]$
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 baseline profit.
11	Incr GM Lift%	$[(\text{Total Incr GM} / \text{Item Baseline GM}) + \text{Allocated Non-ad Baseline GM}] * 100]$
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 5–2 (Cont.) Event Scorecard by Offer/Department Report Metrics

MetricNumber	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. $(\text{Incremental Item Sales} / \text{Item Baseline Sales}) * 100$
16	Allocated Non-ad Sales	Total non-ad sales (baseline + incremental) allocated to the ad item.
17	Incr Allocated Non-Ad Sales	Additional non-ad sales above baseline allocated to the ad item.
18	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.
19	Item Ad GM	Profit generated by the ad item during the ad event (excluding affinity effects).
20	Item Baseline GM	Estimated baseline profit generated by the ad item during the ad period.
21	Incr Item GM	Additional profit generated by the ad item as a result of the ad event compared with the baseline. $(\text{Incr Item Ad GM} / \text{Baseline GM}) * 100$
22	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. $(\text{Incr Item GM} / \text{Item Baseline GM}) * 100$
23	Allocated Non-ad GM	Total non-ad profit (baseline + incremental) allocated to the promotional item.
24	Incr Allocated Non-Ad GM	Additional non-ad profit above baseline allocated to the promo item.

Table 5–2 (Cont.) Event Scorecard by Offer/Department Report Metrics

MetricNumber	Metric	Notes
25	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.
26	Avg. Ad Unit Price	Average price for each item during the promotion.
27	Avg. Regular Unit Price	Average price for each item when it is not on ad.
28	Avg. Discount%	Percentage savings of Ad price compared to regular price. $\frac{[\text{Avg. Regular Unit Price} - \text{Avg. Ad Unit Price}]}{\text{Avg. Regular Unit Price}}$
29	Allocated Non-ad Baseline Sale	Estimated allocated baseline sales of non-ad items during ad period.
30	Allocated Non-Ad 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.
31	Allocated Non-ad Baseline GM	Estimated allocated baseline profit generated by Non-ad items in MB that are allocated to the promo item.
32	Allocated Non-ad 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.
33	Avg Sales per Ad MB	Average sales per transaction containing ad items from the offer.
34	Avg GM per Ad MB	Average profit per transaction containing ad items from the offer.
35	Avg Units per Ad MB	Average units per transaction containing ad items from the offer.
36	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 5–2 (Cont.) Event Scorecard by Offer/Department Report Metrics

MetricNumber	Metric	Notes
37	Avg Ad Units per Store	Average units of ad item in offer sold during the ad event.
38	Avg Baseline Units per Store	Average estimated baseline units of ad items in offer during the ad period.
40	Total Ad Units	Total units of ad items in offer sold during the ad event.
41	Baseline Units	Estimated baseline units of ad items in offer during the ad period.
42	Ad Units Lift%	(Total Ad Units - Baseline Units) / Baseline Units.
43	%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.

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.

Report Prompts and Display

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

1. Choose from all elements of an Event —required.
2. Choose from all elements in the Merchandise Hierarchy —optional.
3. Click **Run Report** to create the report.

Table 5–3 Event Scorecard By Class Report Metrics

Metric Number	Metric	Notes
1	Department	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.

Table 5–3 (Cont.) Event Scorecard By Class Report Metrics

Metric Number	Metric	Notes
5	Item Ad MB Count	Count of ad transactions that contain at least one unit of the ad item.
6	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.
7	Incr Sales Lift%	$[(\text{Total Incr Sales} / \text{Item Baseline Sales} + \text{Allocated Non-ad Baseline Sales}) * 100]$
8	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.
9	Incr GM Lift%	$[(\text{Total Incr GM} / \text{Item Baseline GM}) + \text{Allocated Non-ad Baseline GM}] * 100.$
10	Item Ad Sales	Sales generated by the ad item during the ad event (excluding affinity effects).
11	Item Baseline Sales	Estimated baseline sales generated by the ad item during the ad period.
12	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]
13	Item Ad Sales Lift%	This metric computes sales by ad item against baseline sales. Percentage change in sales over baseline due to ad event.
14	Allocated Non-ad Sales	Total non-ad sales (baseline + incremental) allocated to the ad item.
15	Incr Allocated Non-Ad Sales	Additional non-ad sales above baseline allocated to the ad item.
16	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 5–3 (Cont.) Event Scorecard By Class Report Metrics

Metric Number	Metric	Notes
17	Item Ad GM	Profit generated by the ad item during the ad event (excluding affinity effects).
18	Item Baseline GM	Estimated baseline profit generated by the ad item during the ad period.
19	Incr Item GM	Additional profit generated by the ad item as a result of the ad event compared with the baseline.
20	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.
21	Allocated Non-ad GM	Total non-ad profit (baseline + incremental) allocated to the promotional item.
22	Incr Allocated Non-Ad GM	Additional non-ad profit above baseline allocated to the promo item.
23	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.
24	Avg. Ad Unit Price	Average price for each item during the promotion.
25	Avg. Regular Unit Price	Average price for each item when it is not on ad.
26	Avg. Discount%	Percentage savings of Ad price compared to regular price. $\frac{[\text{Avg. Regular Unit Price} - \text{Avg. Ad Unit Price}]}{\text{Avg. Regular Unit Price}}$
27	Allocated Non-ad Baseline Sales	Estimated allocated baseline sales of non-ad items during ad period.
28	Allocated Non-ad 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. $(\text{Incr Allocated Non-ad Sales} / \text{Allocated Non-ad Baseline Sales}) * 100$

Table 5–3 (Cont.) Event Scorecard By Class Report Metrics

Metric Number	Metric	Notes
29	Allocated Non-ad Baseline GM	Estimated allocated baseline profit generated by Non-ad items in MB that are allocated to the promo item.
30	Allocated Non-ad 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.
31	Avg Sales per MB	The average sales of a transaction containing items from the merchandise level.
32	Avg GM per MB	The average profit of a transaction containing items from the merchandise level.
33	Avg Units per MB	The average size of a transaction containing items from the merchandise level.
34	Avg Ad Units per Store	Average units of ad item in offer sold during the ad event.
35	Avg Baseline Units per Store	Average estimated baseline units of ad items in offer during the ad period.
36	Total Ad Units	Total units of ad items in offer sold during the ad event.
37	Baseline Units	Estimated baseline units of ad items in offer during the ad period.
38	Ad Units Lift%	$(\text{Total Ad Units} - \text{Baseline Units}) / \text{Baseline Units}$
39	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 Subclasses have on the success of particular events.

Report Prompts and Display

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

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

Table 5–4 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	Sub-class	Sub-class id and description of subclass shown in 2 separate columns.
4	Event	Event name that represents a group of promotions such as versions of a single ad.
5	Event 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	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.
8	Incr Sales Lift%	$\left[\frac{\text{Total Incr Sales}}{\text{Item Baseline Sales} + \text{Allocated Non-ad Baseline Sales}} \right] * 100$
9	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.
		$\text{Incr Item GM} + \text{Incr Allocated Non-ad GM}$
10	Incr GM Lift%	$\left[\frac{\text{Total Incr GM}}{\text{Baseline GM} + \text{Allocated Non-ad Baseline GM}} \right] * 100$
11	Item Ad Sales	Sales generated by the ad item during the ad event (excluding affinity effects).
12	Item Baseline Sales	Estimated baseline sales generated by the ad item during the ad period.

Table 5–4 (Cont.) Event Scorecard By Sub-class Report Metrics

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

Table 5–4 (Cont.) Event Scorecard By Sub-class Report Metrics

Metric Number	Metric	Notes
24	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]
25	Avg Ad Unit Price	Average price for each item during the promotion.
26	Avg Regular Unit Price	Average price for each item when it is not on ad.
27	Avg Discount%	Percentage savings of Ad price compared to regular price. [Avg. Regular Unit Price - Avg. Ad Unit Price] / Avg. Regular Unit Price
28	Allocated Non-ad Baseline Sales	Estimated allocated baseline sales non-ad items during ad period.
29	Allocated Non-Ad 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.
30	Allocated Non-ad Baseline GM	Estimated allocated baseline profit generated by Non-ad items in MB that are allocated to the promo item.
31	Avg Sales per MB	Average sales of a transaction containing items from the merchandise level.
32	Avg GM per MB	Average profit of a transaction containing items from the merchandise level.
33	Avg Units per MB	Average size of a transaction containing items from the merchandise level.
34	Avg Ad Units per Store	Average units of ad item in offer sold during ad event.
35	Avg Baseline Units per Store	Average estimated baseline units, of ad items in offer, during the ad period.

Table 5–4 (Cont.) Event Scorecard By Sub-class Report Metrics

Metric Number	Metric	Notes
36	Total Ad Units	Total units of ad items in offer sold during the ad event.
37	Baseline Units	Estimated baseline units of ad items in offer during the ad period.
38	Ad Units Lift%	(Total Ad Units - Baseline Units) / Baseline Units
39	Num of Ads	Number of Ads contained within the report.

Event Scorecard by Department/Offer Amount

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

Table 5–5 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	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
5	Incr Sales Lift%	$\frac{[(\text{Total Incr Sales} / \text{Item Baseline Sales} + \text{Allocated Non-ad Baseline Sales}) * 100]}{100}$

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

Metric Number	Metric	Notes
6	Incr GM Lift%	$[(\text{Total Incr Sales} / \text{Item Baseline Sales}) + \text{Allocated Non--ad Baseline Sales}] * 100$
7	Item Ad Sales	Sales generated by the ad item during the ad event (excluding affinity effects).
8	Item Baseline Sales	Estimated baseline sales generated by the ad item during the ad period.
9	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]
10	Item Ad Sales Lift%	This metric compares sales by ad item against baseline sales. Percentage change in sales over baseline due to ad event. $[\text{Incremental Item Sales} / \text{Item Baseline Sales}] * 100$
11	Allocated Non-Ad Sales	Total non-ad sales (baseline + incremental) allocated to the ad item.
12	Incr Allocated Non-Ad Sales	Additional non-ad sales above baseline allocated to the ad item.
13	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.
14	Item Ad GM	Profit generated by the ad item during the ad event (excluding affinity effects).
15	Item Baseline GM	Estimated baseline profit generated by the ad item during the ad period.
16	Incr Item GM	Additional profit generated by the ad item as a result of the ad event compared with the baseline.
17	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. $[\text{Incr Item GM} / \text{Item Baseline GM}] * 100$

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

Metric Number	Metric	Notes
18	Allocated Non–Ad GM	Total non-ad profit (baseline + incremental) allocated to the promo item.
19	Incr Allocated Non–Ad GM	Additional non-ad profit above baseline, allocated to the promo item.
20	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]
21	Avg AD Unit Price	Average price for each item during the promotion.
22	Avg Regular Unit Price	Average price for each item when it is not on ad.
23	Avg Discount%	Percentage savings of Ad price compared to regular price. [Avg. Regular Unit Price - Avg. Ad Unit Price] / Avg. Regular Unit Price
24	Allocated Non–Ad Baseline Sale	Estimated allocated baseline profit generated by Non-ad items in MB that are allocated to the promo item.
25	Allocated Non–Ad 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.
26	Allocated Non–ad Baseline GM	Estimated allocated baseline profit generated by Non-ad items in MB that are allocated to the promo item.
27	Allocated Non–ad 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. Incr Allocated Non–Ad GM / Allocated Non–Ad Baseline GM) * 100

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

Metric Number	Metric	Notes
28	Avg Ad Units per Store	Average units of ad item in offer sold during the ad event.
29	Avg Baseline Units per Store	Average estimated baseline units of ad items in offer during the ad period.
30	Total Ad Units	Total units of ad items in offer sold during the ad event.
31	Baseline Units	Estimated baseline units of ad items in offer during the ad period.
32	Ad Units Lift%	$(\text{Total Ad Units} - \text{Baseline Units}) / \text{Baseline Units}$
33	Allocated Non-Ad Units	Total non-ad units (baseline + incremental) allocated to the ad item.
34	Allocated Non-Ad Baseline Units	Estimated allocated baseline units of non-ad items during ad period.
35	Incr Allocated Non-Ad Units	Additional non-ad units above baseline allocated to the ad item.
36	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.

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

Metric Number	Metric	Notes
37	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> $(((\text{Item Ad Sales Lift\%} \times .4) + (\text{Item Ad GM Lift\%} \times .4) + (\text{Ad Units\% Chng} \times .2)) + 100).$
38	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> $\text{Value Index} + ((\text{Affinity Sales Lift\%} \times .4) + (\text{Affinity GM Lift\%} \times .4) + (\text{Affinity Units Lift\%} \times .2)).$
39	Num of Ads	Number of Ads contained within the report.

Event Scorecard by Class/Offer Amount

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.

Report Prompts and Display

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

1. Choose and Event—(required)
2. Filter selections according to merchandise hierarchy level—(optional)

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

Table 5–6 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	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
6	Incr Sales Lift%	$[(\text{Total Incr Sales} / \text{Item Baseline Sales} + \text{Allocated Non-ad Baseline Sales}) * 100]$
7	Incr GM Lift%	
8	Incr GM Lift%	$[(\text{Total Incr Sales} / \text{Item Baseline Sales}) + \text{Allocated Non-ad Baseline Sales}] * 100$
9	Item Ad Sales	Sales generated by the ad item during the ad event (excluding affinity effects).
10	Item Baseline Sales	Estimated baseline sales generated by the ad item during the ad period.
11	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]
12	Item Ad Sales Lift%	This metric compares sales by ad item against baseline sales. Percentage change in sales over baseline due to ad event. $[\text{Incremental Item Sales} / \text{Item Baseline Sales}] * 100$
13	Allocated Non–Ad Sales	Total non-ad sales (baseline + incremental) allocated to the ad item.
14	Incr Allocated Non–Ad Sales	Additional non-ad sales above baseline allocated to the ad item.

Table 5–6 (Cont.) Standard Metrics in the Class Offer Amount Report

Metric Number	Metric	Notes
15	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.
16	Item Ad GM	Profit generated by the ad item during the ad event (excluding affinity effects).
17	Item Baseline GM	Estimated baseline profit generated by the ad item during the ad period.
18	Incr Item GM	Additional profit generated by the ad item as a result of the ad event compared with the baseline.
19	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. $[\text{Incr Item GM} / \text{Item Baseline GM}] * 100$
20	Allocated Non-Ad GM	Total non-ad profit (baseline + incremental) allocated to the promo item.
21	Incr Allocated Non-Ad GM	Additional non-ad profit above baseline, allocated to the promo item.
22	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. $[\text{Item Ad GM} + \text{Allocated Non-ad GM}]$
23	Avg AD Unit Price	Average price for each item during the promotion.
24	Avg Regular Unit Price	Average price for each item when it is not on ad.
25	Avg Discount%	Percentage savings of Ad price compared to regular price. $[\text{Avg. Regular Unit Price} - \text{Avg. Ad Unit Price}] / \text{Avg. Regular Unit Price}$
26	Allocated Non-Ad Baseline Sale	Estimated allocated baseline profit generated by Non-ad items in MB that are allocated to the promo item.

Table 5–6 (Cont.) Standard Metrics in the Class Offer Amount Report

Metric Number	Metric	Notes
27	Allocated Non-Ad 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.
28	Allocated Non-ad Baseline GM	Estimated allocated baseline profit generated by Non-ad items in MB that are allocated to the promo item.
29	Allocated Non-Ad 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. Incr Allocated Non-Ad GM / Allocated Non-Ad Baseline GM) * 100
30	Avg Ad Units per Store	Average units of ad item in offer sold during the ad event.
31	Avg Baseline Units per Store	Average estimated baseline units of ad items in offer during the ad period.
32	Total Ad Units	Total units of ad items in offer sold during the ad event.
33	Baseline Units	Estimated baseline units of ad items in offer during the ad period.
34	Ad Units Lift%	$(\text{Total Ad Units} - \text{Baseline Units}) / \text{Baseline Units}$
35	Allocated Non-Ad Units	Total non-ad units (baseline + incremental) allocated to the ad item.
36	Allocated Non-Ad Baseline Units	Estimated allocated baseline units of non-ad items during ad period.
37	incr Allocated Non-Ad Units	Additional non-ad units above baseline allocated to the ad item.
38	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.

Table 5–6 (Cont.) Standard Metrics in the Class Offer Amount Report

Metric Number	Metric	Notes
39	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> $(((\text{Item Ad Sales Lift\%} \times .4) + (\text{Item Ad GM Lift\%} \times .4) + (\text{Ad Units\% Chng} \times .2)) + 100).$
40	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> $\text{Value Index} + ((\text{Affinity Sales Lift\%} \times .4) + (\text{Affinity GM Lift\%} \times .4) + (\text{Affinity Units Lift\%} \times .2)).$
41	Num of Ads	Number of Ads contained within the report.

Event Scorecard by Subclass/Offer Amount

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 Subclass/Offer Amount:

1. Choose and Event—(required)
2. Filter selections according to merchandise hierarchy level—(optional)

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

Table 5–7 Standard Metrics in the Subclass Offer Amount Report

Metric Number	Metric	Notes
1	Dept	Department Name and ID number
2	Class	Class Name and ID Number
3	Subclass	Subclass Name and ID Number
4	Offer Type	Type of Offer (e.g.%off, Price Point, etc.)
5	Offer Amt	Amount of the Offer
6	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
7	Incr Sales Lift%	$\left[\frac{\text{Total Incr Sales}}{\text{Item Baseline Sales} + \text{Allocated Non-ad Baseline Sales}} \right] * 100$
8	Incr GM Lift%	
9	Incr GM Lift%	$\left[\frac{\text{Total Incr Sales}}{\text{Item Baseline Sales} + \text{Allocated Non-ad Baseline Sales}} \right] * 100$
10	Item Ad Sales	Sales generated by the ad item during the ad event (excluding affinity effects).
11	Item Baseline Sales	Estimated baseline sales generated by the ad item during the ad period.
12	Incr Item Sales	Additional sales generated by the item as a result of the ad event compared with the estimated baseline sales. $[\text{Item Ad Sales} - \text{Item Baseline Sales}]$
13	Item Ad Sales Lift%	This metric compares sales by ad item against baseline sales. Percentage change in sales over baseline due to ad event. $\left[\frac{\text{Incremental Item Sales}}{\text{Item Baseline Sales}} \right] * 100$
14	Allocated Non-Ad Sales	Total non-ad sales (baseline + incremental) allocated to the ad item.

Table 5–7 (Cont.) Standard Metrics in the Subclass Offer Amount Report

Metric Number	Metric	Notes
15	Incr Allocated Non-Sales	Additional non-ad sales above baseline allocated to the ad item.
16	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.
17	Item Ad GM	Profit generated by the ad item during the ad event (excluding affinity effects).
18	Item Baseline GM	Estimated baseline profit generated by the ad item during the ad period.
19	Incr Item GM	Additional profit generated by the ad item as a result of the ad event compared with the baseline.
20	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
21	Allocated Non-Ad GM	Total non-ad profit (baseline + incremental) allocated to the promo item.
22	Incr Allocated Non-Ad GM	Additional non-ad profit above baseline, allocated to the promo item.
23	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]
24	Avg AD Unit Price	Average price for each item during the promotion.
25	Avg Regular Unit Price	Average price for each item when it is not on ad.
26	Avg Discount%	Percentage savings of Ad price compared to regular price. [Avg. Regular Unit Price - Avg. Ad Unit Price] / Avg. Regular Unit Price

Table 5–7 (Cont.) Standard Metrics in the Subclass Offer Amount Report

Metric Number	Metric	Notes
27	Allocated Non-Ad Baseline Sale	Estimated allocated baseline profit generated by Non-ad items in MB that are allocated to the promo item.
28	Allocated Non-Ad 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.
29	Allocated Non-ad Baseline GM	Estimated allocated baseline profit generated by Non-ad items in MB that are allocated to the promo item.
30	Allocated Non-Ad 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. $\text{Incr Allocated Non-Ad GM} / \text{Allocated Non-Ad Baseline GM} * 100$
31	Avg Ad Units per Store	Average units of ad item in offer sold during the ad event.
32	Avg Baseline Units per Store	Average estimated baseline units of ad items in offer during the ad period.
33	Total Ad Units	Total units of ad items in offer sold during the ad event.
34	Baseline Units	Estimated baseline units of ad items in offer during the ad period.
35	Ad Units Lift%	$(\text{Total Ad Units} - \text{Baseline Units}) / \text{Baseline Units}$
36	Allocated Non-Ad Units	Total non-ad units (baseline + incremental) allocated to the ad item.
37	Allocated Non-Ad Baseline Units	Estimated allocated baseline units of non-ad items during ad period.
38	Incr Allocated Non-Ad Units	Additional non-ad units above baseline allocated to the ad item.

Table 5–7 (Cont.) Standard Metrics in the Subclass Offer Amount Report

Metric Number	Metric	Notes
39	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.
40	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> $(((\text{Item Ad Sales Lift\%} \times .4) + (\text{Item Ad GM Lift\%} \times .4) + (\text{Ad Units\% Chng} \times .2)) + 100).$
41	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> $\text{Value Index} + ((\text{Affinity Sales Lift\%} \times .4) + (\text{Affinity GM Lift\%} \times .4) + (\text{Affinity Units Lift\%} \times .2)).$
42	Num of Ads	Number of Ads contained within the report.

Overlapping SKUs

Business Value

This report identifies cases where the same SKU exists in different offers in the same event. This 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 SKU's report

1. Select a Start Date—required.
2. Select an End Date—required.
3. Choose from all promotion or select a specific promotion—optional.
4. Filter results according to merchandise hierarchy—optional.

Table 5–8 Overlapping SKU's 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	Subclass ID	Client ID to identify the subclass
15	Subclass	Subclass ID and Description of subclass 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 the affinity products, or items that tend to sell with other items. It displays all of the affinity rules produced by the ARM application. With this information, you can maximize every page of your circular.

Report Prompts and Display

Select from the following options to create an Affinity Report:

1. Choose an ARM Set—required.
2. Qualify a Metric—optional.
3. Choose from all attributes from Merchandise Hierarchy A—optional.
4. Select attributes for Merchandise Hierarchy B—optional.
5. Click **Run Report** to create the report. Click **Cancel** to cancel.

Table 5–9 Standard Metrics in the Affinity Report

Metric Number	Metric	Notes
1	Affinity Item A Dept	Dept ID and Description
2	Affinity Item A Class	Class ID and Description
3	Affinity Item A	Affinity Node A ID and Description
4	Affinity Item B Dept	Dept ID and Description
5	Affinity Item B Class	Class ID and Description
6	Affinity Item 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

Table 5–9 (Cont.) Standard Metrics in the Affinity Report

Metric Number	Metric	Notes
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 that 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.

Table 5–9 (Cont.) Standard Metrics in the Affinity Report

Metric Number	Metric	Notes
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.
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 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. Select an ARM run—required.
2. Select Affinity Item A—optional.
3. Select Affinity Item B—optional.
4. Quality on a Metric—optional.

5. Click **Run Report** to generate the report. Click **Cancel** to cancel.

Table 5–10 Standard Metrics in the Affinity Report

Metric Number	Metric	Notes
1	Affinity Item A Dept	Dept ID and Description
2	Affinity Item A Class	Class ID and Description
3	Affinity Item A	Affinity Node A ID and Description
4	Affinity Item B Dept	Dept ID and Description
5	Affinity Item B Class	Class ID and Description
6	Affinity Item 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 that 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.

Table 5–10 (Cont.) Standard Metrics in the Affinity Report

Metric Number	Metric	Notes
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.

Table 5–10 (Cont.) Standard Metrics in the Affinity Report

Metric Number	Metric	Notes
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
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
2. Select a Promotion Starting on or After date
3. Select a Promotion Ending on or Before date
4. Select a Changes Applied on date
5. Select a Changes Applied by person
6. Select the Type of Change
7. Select the Object Changed

8. Select **Run Report** to generate the report. Click **Cancel** to cancel the report.

Table 5–11 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
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 the 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
2. Select a Promotion Starting on or After date
3. Select a Promotion Ending on or Before date
4. Select a Changes Applied on date
5. Select a Changes Applied by person
6. Select the Type of Change
7. Select the Object Changed
8. Select **Run Report** to generate the report. Click **Cancel** to cancel the report.

Table 5–12 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
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.

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 Net Perceptions consultant 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 6–1 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 6–1 (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
Group MB	Group Market Basket	A transaction that contains at least one item from a specific level of the product hierarchy

Table 6–1 (Cont.) Metric Term Short Name

Short Form	Long Form	Represents
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
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

Table 6–1 (Cont.) Metric Term Short Name

Short Form	Long Form	Represents
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 6–2 Metric Names and Definitions

Metric	Definition
Actual Quantity	Actual number of units sold, for all items in the selected segment
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

Table 6–2 (Cont.) Metric Names and Definitions

Metric	Definition
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 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
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

Table 6–2 (Cont.) Metric Names and Definitions

Metric	Definition
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 baseling 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.
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 tiems from the merchandise level (regardless if the item is or not on Ad).
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.

Table 6–2 (Cont.) Metric Names and Definitions

Metric	Definition
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
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

Table 6–2 (Cont.) Metric Names and Definitions

Metric	Definition
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
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

Table 6–2 (Cont.) Metric Names and Definitions

Metric	Definition
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
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
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

Table 6–2 (Cont.) Metric Names and Definitions

Metric	Definition
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%	$[(\text{Total Incr GM} / \text{Item Baseline GM}) + \text{Allocated Non-ad Baseline GM}] * 100$
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

Table 6–2 (Cont.) Metric Names and Definitions

Metric	Definition
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.
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

Table 6–2 (Cont.) Metric Names and Definitions

Metric	Definition
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
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

Table 6–2 (Cont.) Metric Names and Definitions

Metric	Definition
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
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

Table 6–2 (Cont.) Metric Names and Definitions

Metric	Definition
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
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.

Table 6–2 (Cont.) Metric Names and Definitions

Metric	Definition
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.
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

