Oracle® Retail Promotion Planning and Optimization

User Guide

Release 13.2

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Oracle® Retail Promotion Planning and Optimization User Guide, Release 13.2

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Preface

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

Audience

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

Related Documents

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

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

Customer Support

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

https://support.oracle.com

When contacting Customer Support, please provide the following:

- Product version and program/module name

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

Review Patch Documentation

When you install the application for the first time, you install either a base release (for example, 13.2) or a later patch release (for example, 13.2.1). If you are installing the base release, additional patch, and bundled hot fix releases, read the documentation for all releases that have occurred since the base release before you begin installation. Documentation for patch and bundled hot fix releases can contain critical information related to the base release, as well as information about code changes since the base release.

Oracle Retail Documentation on the Oracle Technology Network

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

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

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

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

Conventions

The following text conventions are used in this document:

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

1 Getting Started

Oracle Retail Promotion Planning and Optimization assists you in creating and improving your promotions.

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

- About Oracle Retail Promotion Planning and Optimization on page 1-1.
- Logging on to Promotion Planning and Optimization on page 1-2.
- Sending an Error Report on page 1-3.

About Oracle Retail Promotion Planning and Optimization

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

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

Promotion Planning and Optimization implements a K-Nearest Neighbors (KNN) forecast methodology that ensures the performance of the past promotions for similar items are always considered and are at least as good as the average of the past sales performance.

Features

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

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

Users

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

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

Tasks

Promotion Planning and Optimization assists in:

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

Logging on to Promotion Planning and Optimization

To access Promotion Planning and Optimization:

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

Figure 1–1 Login Window

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

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

---

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

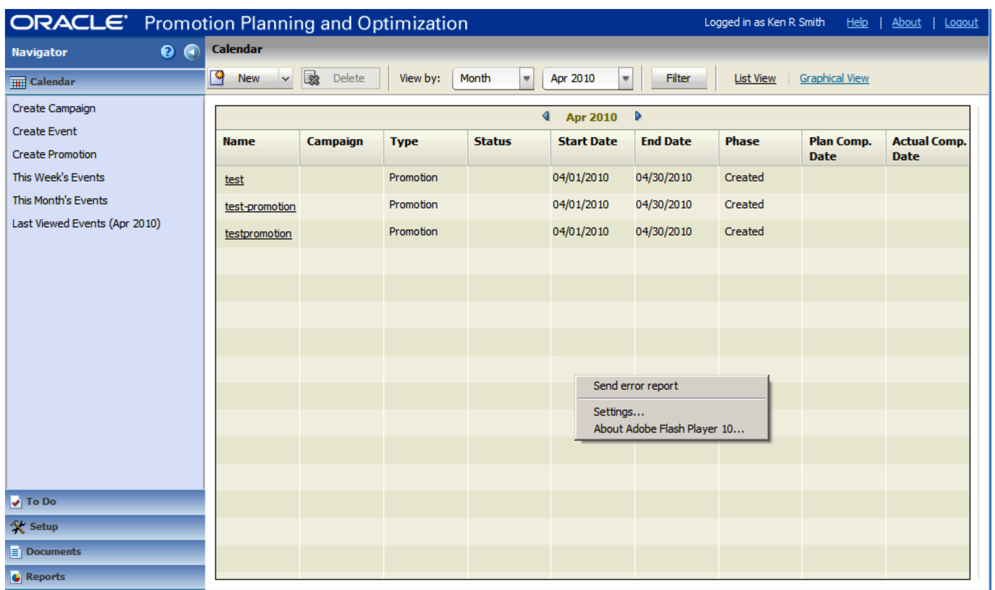
Sending an Error Report

In case an unexpected error occurs in the application, you can report it immediately using the Send Error Report right-click menu option. This feature enables you to send the relevant information directly to the support representative.

To send an error report to your support representative:

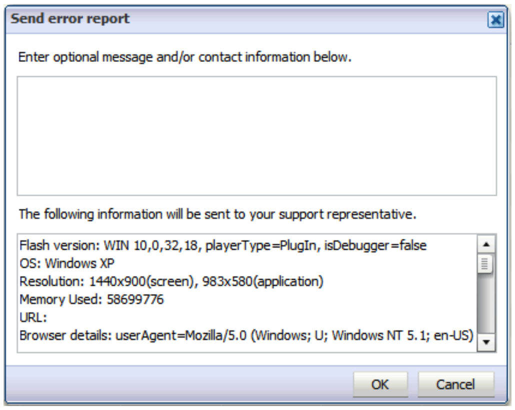
1. From the screen where the error occurred, click **Send Error Report** from the right-click menu option. The **Send error report** window appears.

Figure 1–2 Right-Click Menu Option - Send Error Report



2. In the **Send error report** window, you can choose to provide additional information or your contact information, and then click **OK** to send the report.

Figure 1–3 Send Error Report Window



2 Navigation

The Calendar and Navigator within Promotion Planning and Optimization provide tools to help you plan and create promotions and move around the application.

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

Calendar

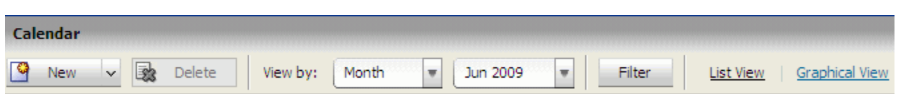
The calendar is your starting point in Promotion Planning and Optimization. It allows you to view all the promotions and events for the week, month, quarter or year and highlight specific types of events. Use the calendar to plan and define details for promotions, campaigns, and events.

Calendar Toolbar and Controls

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

- New—use this feature to create new campaigns, events, or promotions.
- Delete—use this feature to delete campaigns, events, or promotions.
- View By—use this feature to view all campaigns, events, and promotions by the week, quarter, month or year.
- Filter—select the types of events you want to view on the calendar such as campaigns, promotions, company events, personal events or competitor events.
- Graphical View—view all events on the calendar in a traditional calendar format.
- List View—view all events on the calendar in a list format.

Figure 2–1 The Calendar Toolbar

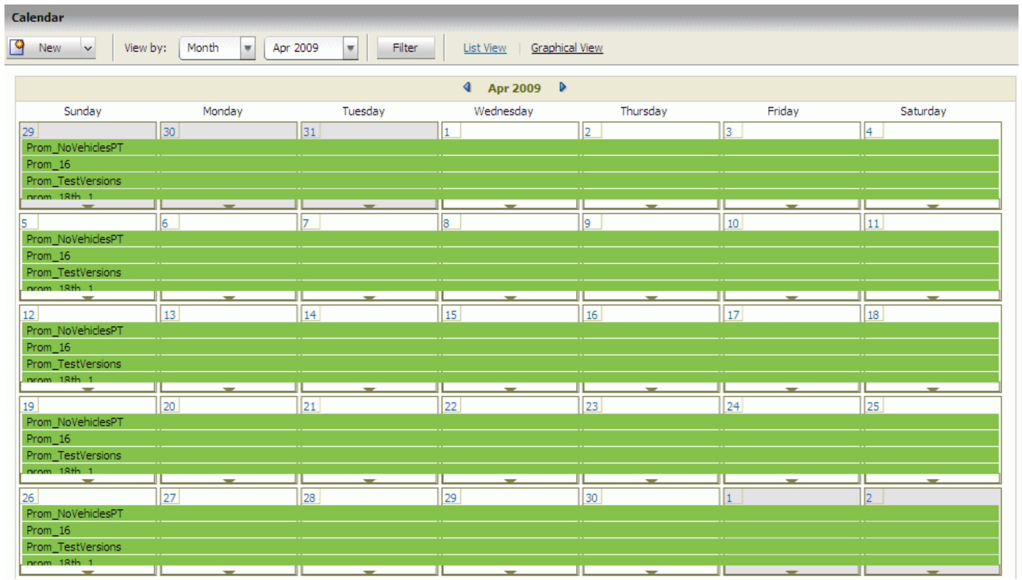


Calendar Views

There are two ways to view the Calendar: graphical and list.

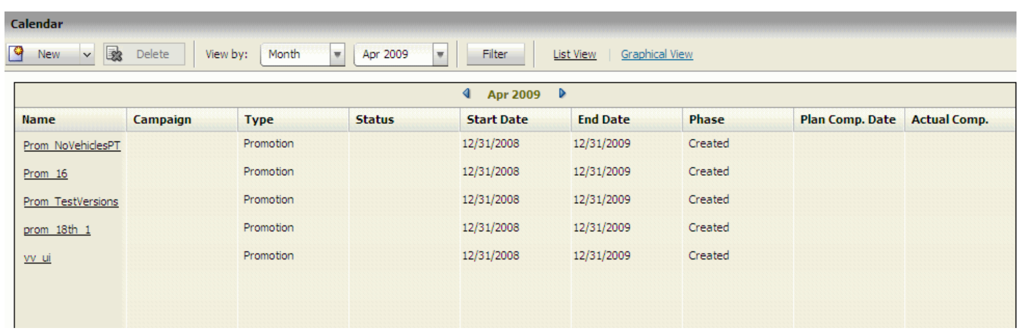
- Select Graphical View to view the calendar in a traditional calendar format (as shown below).

Figure 2–2 Calendar Graphical View



- Select List View to view the Calendar as a list of entries in table format.

Figure 2–3 Calendar List View



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

Figure 2–4 Next/Previous Month Arrows

Note: If "View by" is set to another period type, this will correspond to that type. For example, if "View by" is set to week, this will show the week and the arrows will navigate to previous or next week.

Creating Items from the Calendar

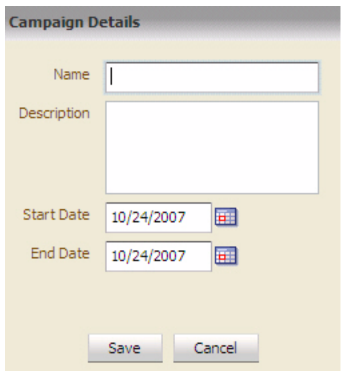
Campaigns, events, and promotions can be created from the calendar.

Creating Campaigns

To create a campaign from the calendar:

1. Click **New**.
2. Select **Campaign**.
3. The Campaign Details window opens to the right of the Calendar.

Figure 2–5 The Campaign Details Window



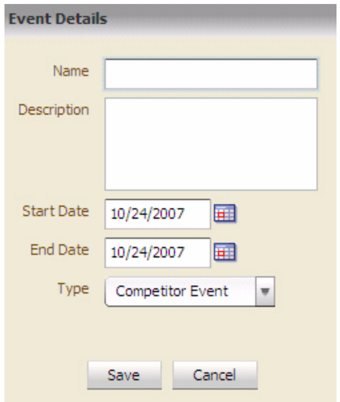
4. **Name**—enter a name for the Campaign.
5. **Description**—enter a description.
6. **Start Date**—enter a start date.
7. **End Date**—enter an end date.
8. Click **Save**.

Creating Events from the Calendar

To create an event from the calendar:

1. Click **New**.
2. Select **Event**.
3. The Event Details window opens to the right of the Calendar.

Figure 2–6 Event Details Window



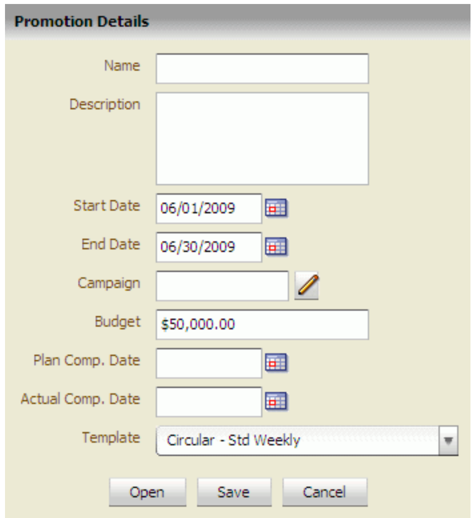
4. **Name**—enter a name for the event.
5. **Description**—enter a description.
6. **Start Date**—enter a start date.
7. **End Date**—enter an end date.
8. **Type**—select an event type from the following options:
   - **Competitor**—create an event that reflects a competitor's event.
   - **Company**—create an event that reflects a company event.
   - **Personal**—create an event that reflects a personal event.
9. Click **Save**.

Creating Promotions from the Calendar

To create a promotion from the calendar:

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

Figure 2–7 The Promotion Details Window



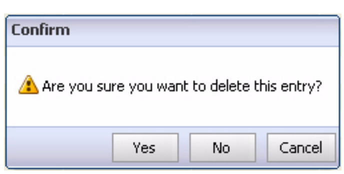
4. **Name**—enter a name for the promotion.
5. **Description**—enter a description.
6. **Start Date**—enter a start date for the promotion.
7. **End Date**—enter an end date for the promotion.
8. **Campaign**—use this option to associate your promotion with a campaign. Select a campaign using the drop down list of campaigns.
9. **Budget**—enter the budget amount for your promotion.
10. **Plan Comp. Date**—use this field to set the date when the promotion is scheduled to be completed.
11. **Actual Comp. Date**—use this field to record the actual date when the promotion was completed.
12. **Template**—select a promotion template to use.

Removing Items from the Calendar

To remove an item from the calendar:

1. Select the row (list view) or icon (graphical view) of the event to remove.
2. Click **Delete**. The Confirm window opens.

Figure 2–8 Confirm Delete Window



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

Viewing Calendar Entries

To view entries by a different time period:

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

To view certain types of events only:

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

Navigator

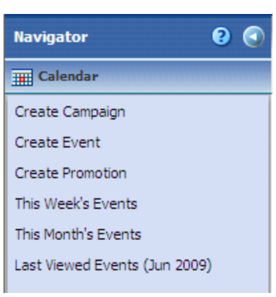
The Navigator appears on the left side of the Promotion Planning and Optimization window.

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

Calendar

The Calendar section of the Navigator lists calendar related functions available to you. Use it as a navigational tool to return to the Calendar from any location within Promotion Planning and Optimization.

Figure 2–9 The Calendar Section of the Navigator



- Use the "Create" links to quickly create promotional items.
- Use the event short cut links to view the current week or month's events.

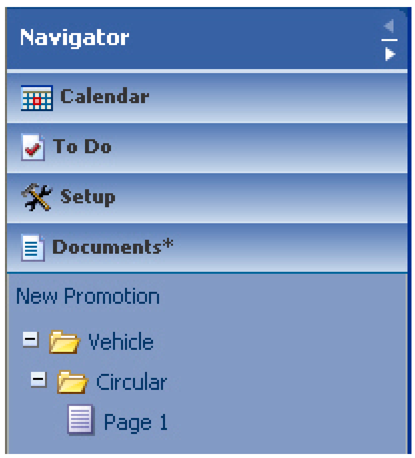
Documents

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

Viewing an Open Document

To view an open document:

Figure 2–10 Navigator Documents Section

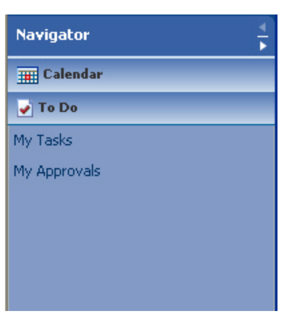


- Select a document or page to go directly to the Vehicle Design tab for that page.

To Do

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

Figure 2–11 The To Do Section of the Navigator



My Approvals

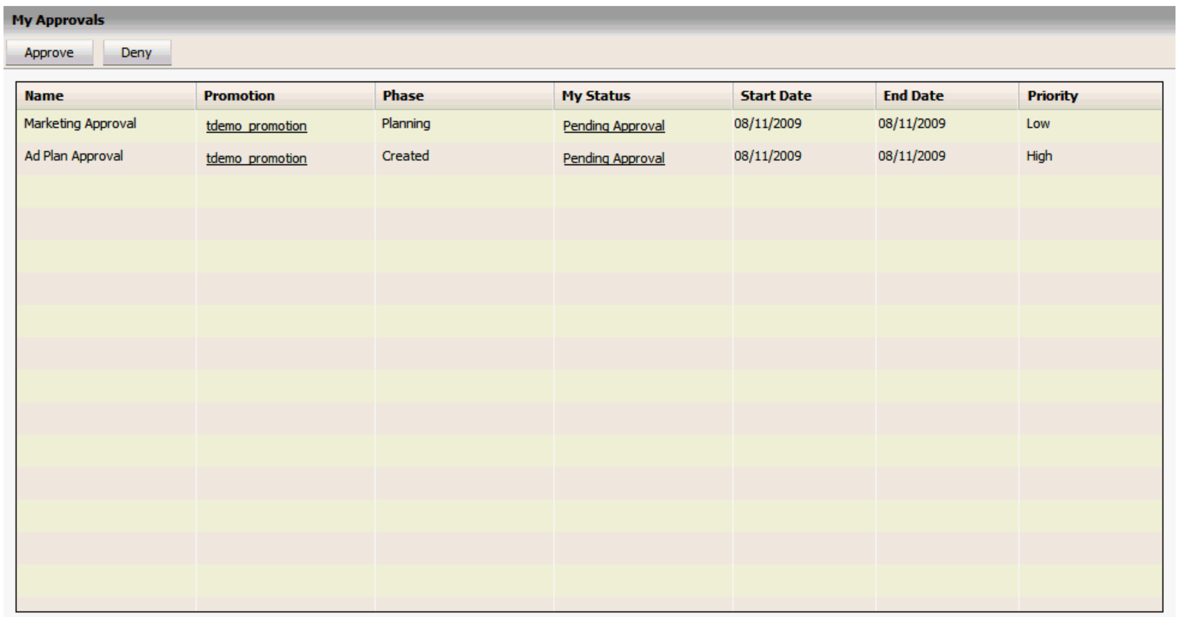
Use the My Approvals window to approve and deny approvals assigned to you.

Viewing Approvals

To view your approvals:

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

Figure 2–12 My Approvals Window



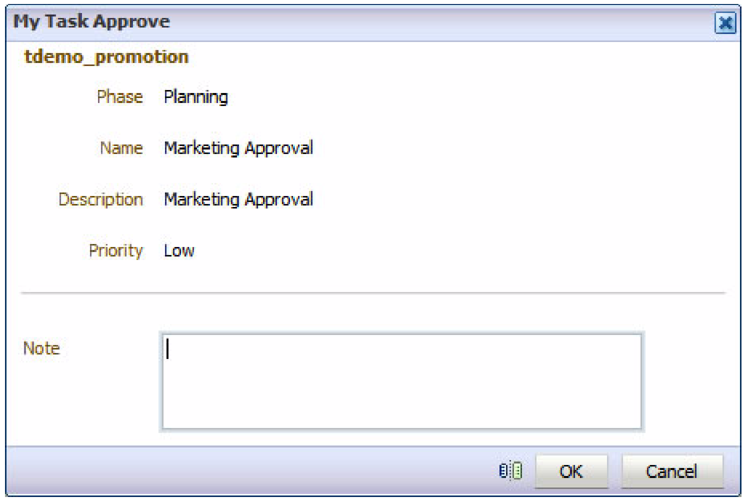
2. From the Promotion column, select a promotion by clicking onto the link. The Promotion Manager opens with either the Summary Tab or Workflow tab open.

Making Approvals

To make an approval:

1. Select a promotion. Click once onto the promotion to highlight it.
2. Click **Approve** to accept a selected approval. The My Task Approve window opens.

Figure 2–13 My Task Approve Window



3. **Note**—enter descriptive information about the approval.
4. Click **OK**. The Workflow tab of the promotion is displayed.

Denying Approvals

To deny an approval:

1. Select a promotion. Click once onto the promotion to highlight it.
2. Click **Deny** to deny an approval. The My Task Deny window opens.
3. **Note**—enter descriptive information about the denial.
4. Click **OK**. The Workflow Tab of the promotion is displayed.

My Tasks

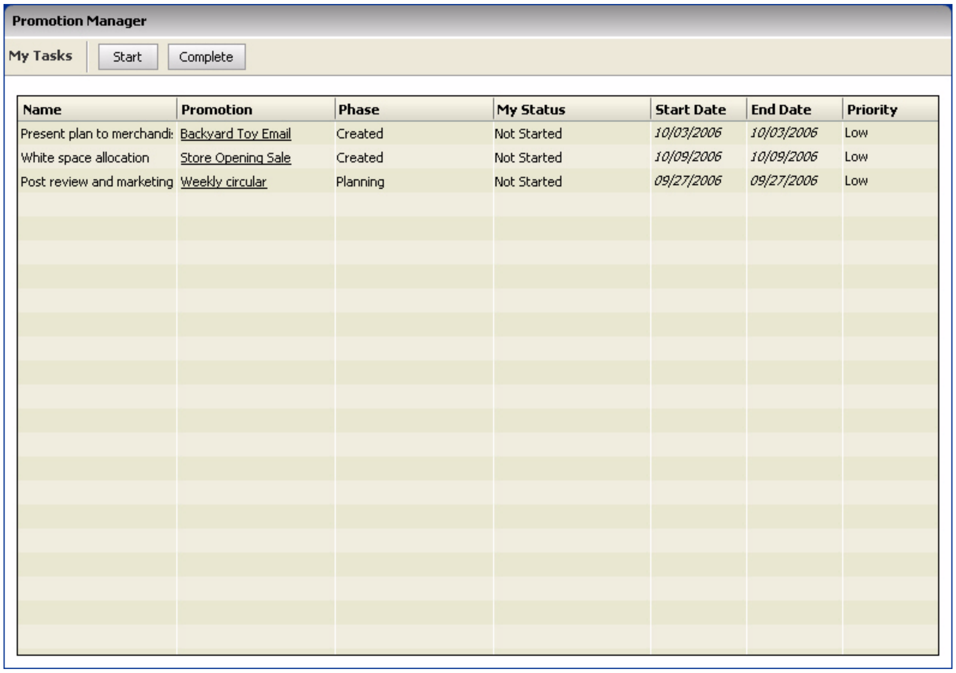
Use the My Tasks window to view your assigned tasks, navigate to them, and to change the status of the tasks on the workflow (start and complete). The My Tasks section of the Navigator acts a shortcut to the larger Workflow option within a promotion. For more information about Workflow in a promotion, see About Workflow on page 7-1.

Working on Assigned Tasks

To work on your tasks:

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

Figure 2–14 My Tasks Window



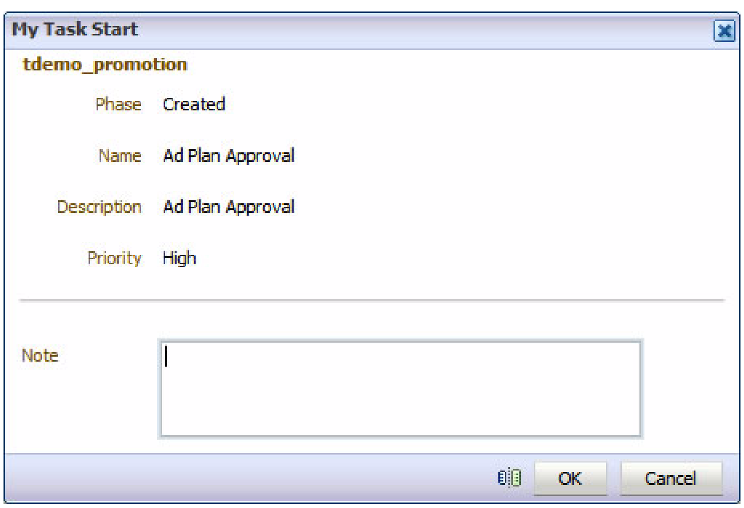
2. From the Promotion column, select the link of the promotion you want to work on. The appropriate promotion document opens in Promotion Manager with the Workflow window open.

Starting Assigned Tasks

To start an assigned task:

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

Figure 2–15 My Task Start Window



2. **Note**—enter additional descriptive or instructional information.

3. Click **OK**. The Workflow tab of the promotion is displayed. The status of the task changes to Started.

Completing Tasks

To complete a task:

1. Click **Complete** to finish a selected task. The My Task Complete Window opens.
2. **Note**—enter additional descriptive or instructional information.
3. Click **OK**. The workflow tab of the promotion is displayed. The status of the task changes to Completed if you are the only user assigned to the task or all other users have completed their assignments.

Setup

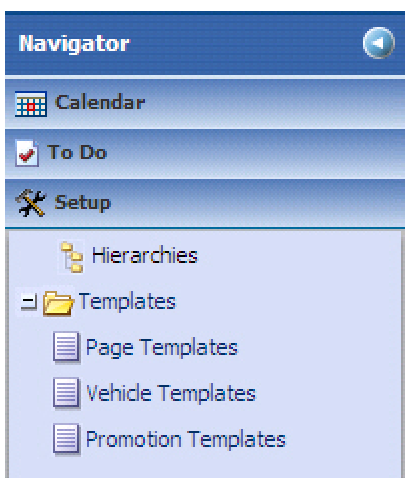
The Setup section lets you manage merchandise, view and edit available templates, and create new templates.

The following templates are available:

- Page Templates—Page templates provide standard layouts for positioning items and categories on pages. A page is a location within a vehicle where an item or items are promoted. Page templates are associated with vehicle templates.
- Vehicle Templates—Vehicle templates provide standardized promotion mediums. A vehicle contains page templates and is associated with a promotion template. Types of vehicle templates include circulars, in store displays, newspaper ads, and direct mails. A vehicle template is associated with a single type of vehicle.
- Promotion templates—Promotion templates provide formats for standard promotions. They also include default tasks or milestones for the Workflow tab. A promotion template can reference a single vehicle template.

See Templates for more information on creating and editing templates.

Figure 2–16 Navigator Setup Section

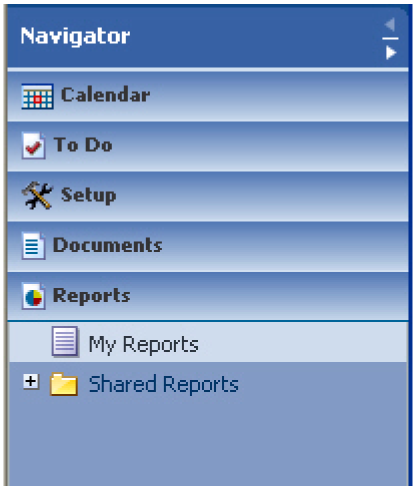


Reports

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

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

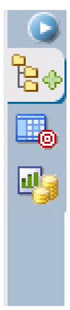
Figure 2–17 Navigator Reports Section



The Vertical Tab: Hierarchies Selector, Target Allocation, and Promotion Performance

After a promotion is opened from the Calendar, the Vertical Tab appears between the Promotion Manager and the Navigator. Expand or collapse the tab using the blue arrow.

Figure 2–18 Minimized Vertical Tab



Hierarchies Selector

When you expand the Vertical Tab, the Hierarchies Selector opens by default. The Hierarchies Selector provides a view of the following:

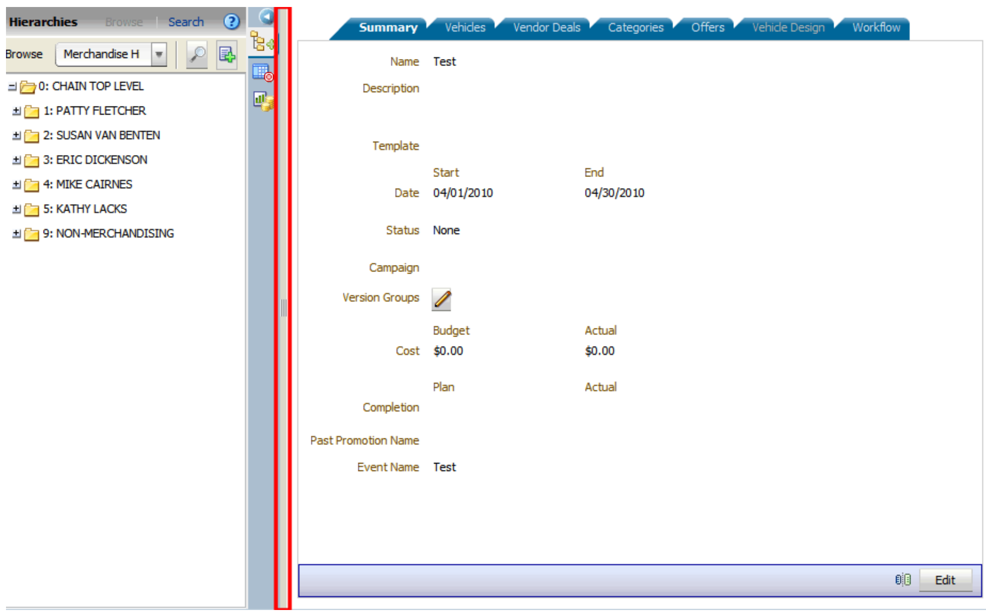
- Location Hierarchy—view a list of locations defined for your business. When working with version groups, you select locations from this hierarchy, drag it to the Version Groups Detail window, and add or replace locations. For more information, see Version Groups on page 5-7.
- Store Sets—view a list of store sets defined for your business. When working with version groups, you select store sets or store subsets from this hierarchy, drag it to the Version Groups Detail window, and add or replace store sets. For more information, see Version Groups on page 5-7.
- Merchandise Hierarchy—view all merchandise according to the organization established for your business.

- Assigned Categories—if you are viewing a promotion within the Promotion Manager, view the categories that have been assigned to it. For information about assigning categories to a promotion, see Categories on page 5-17.
- Offers—if you have already defined offers for a promotion, view these offers according to vehicle, version, and whether they are positioned or unpositioned. For more information about offers, see Offers on page 5-18.
- SKU Lists—view all SKU Lists defined for your organization.

Use the Search and View Details (icon of a magnifying glass) features to assist you in searching for and viewing the details of items contained within the Hierarchies Selector.

You can also resize the expanded Vertical tab by dragging the vertical bar between the Vertical tab and the content area to view more data in the hierarchies selector.

Figure 2–19 Resize Vertical Bar Next to the Expanded Vertical Tab

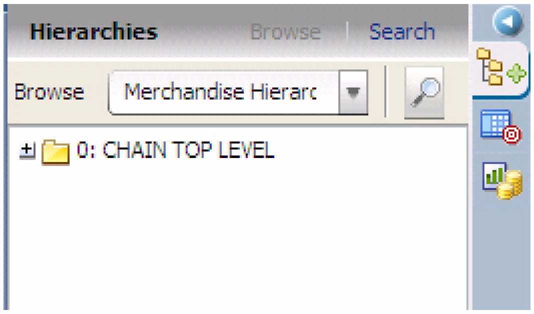


Merchandise Hierarchy

Use the Merchandise Hierarchy to view and select merchandise levels.

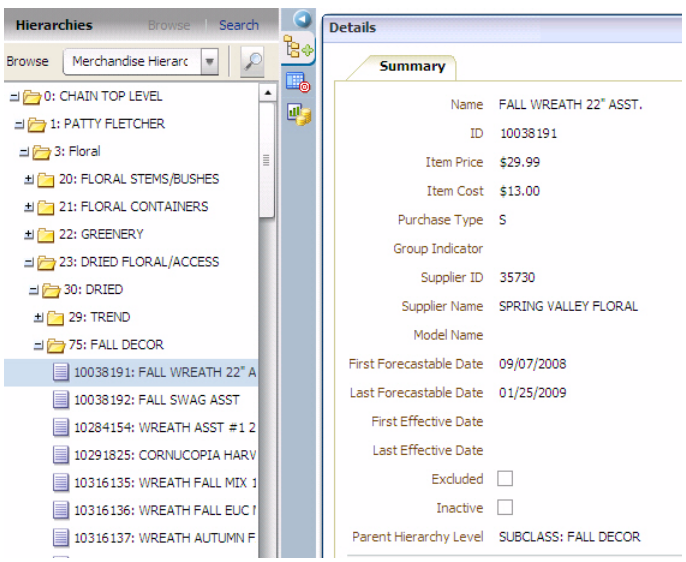
1. Open a promotion. The Vertical Tab appears to the left of the promotion details window in the Promotion Manager.
2. Click the arrow at the top of the Vertical Tab to expand it.

Figure 2–20 Expanded Vertical Tab with the Hierarchies Selector Opened



3. Using the Browse field in Hierarchies selector, select Merchandise Hierarchy. Click the plus sign to expand the hierarchy.
4. To obtain additional details for a merchandise item:
   – Click once onto the item to highlight it.
   – Click the magnifying glass. The Details window opens.

Figure 2–21 Details Window



   – In the Details window, note the fields for First Forecastable Date and Last Forecastable Date. In order to generate a forecast for a given item, the start and end dates for a promotion must fall within the range indicated by these dates.

Managing Merchandise

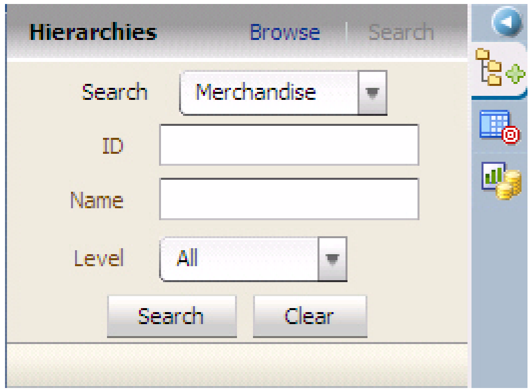
You can also manage merchandise from within a promotion using the Merchandise Hierarchy and the view details button.

To find merchandise to manage:

1. Click **Hierarchies** from the Setup section of Navigator. The Hierarchies Selector opens.
2. **Browse**—use the drop down list to select **Merchandise Hierarchy**.
3. Navigate to the item you want to manage by expanding each folder level or Search for items.

a. To search for items, click **Search**. The Merchandise finder changes to search view.

Figure 2–22 Merchandise Hierarchy Search View



b. Enter criteria in the fields to narrow the search. Enter part or all of an Item ID or Name. Select a Merchandise Hierarchy level from the Level field.

c. Click **Search**. Items that match the search criteria appear in the list.

Note: An alert may appear if you do not enter enough information in the search criteria fields. Click OK, and enter more criteria.

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

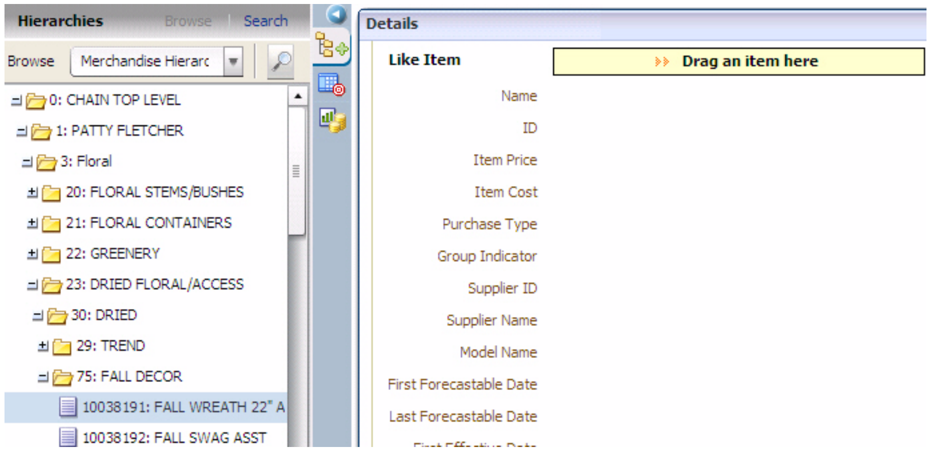
Like Items

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

Creating Like Item Associations To create a like item association:

1. After opening the Merchandise Hierarchy, locate an item that needs a like item.
2. Click the magnifying glass to view details. The Details window opens.
3. Navigate to the item you want to associate the selected item with using the Merchandise selector.
4. Drag the like item to "Drag an item here" on the Details window. The item's details appear in the Like Items area of the Details window.

Figure 2–23 Associating a Like Item to an Item within the Merchandise Hierarchy



5. Click **OK**.

Removing Like Item Associations To remove a like item association:

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

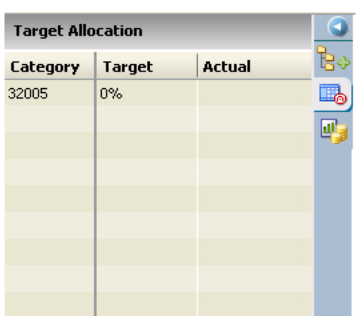
Target Allocation

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

To view target versus actual space allocation:

1. Open a promotion from the Calendar. The Vertical Tab appears to the left of the promotion details window in Promotion Manager.
2. Click the Target Allocation button. The Target Allocation window opens.

Figure 2–24 Target Allocation Window



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

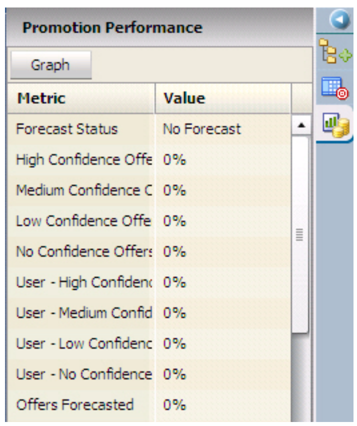
Promotion Performance

Use Promotion Performance to view performance metric values and generate a graph.

To view promotion performance information:

1. Open a promotion from the Calendar. The Vertical Tab appears to the left of the promotion details window in the Promotion Manager.
2. Click the Promotion Performance button. The Promotion Performance window opens. The performance metrics are listed. For more information about the metrics, see The Vertical Tab—Promotion Performance Metrics on page A-10.

Figure 2–25 Promotion Performance Window



3

Templates

Templates make the day-to-day planning and creation of promotions easier by standardizing promotion documents.It is also possible to assign versions to templates to assist with managing promotions that take place across different regions.

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

- Page Templates on page 3-1.
- Vehicle Templates on page 3-6.
- Promotion Templates on page 3-12.

Page Templates

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

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

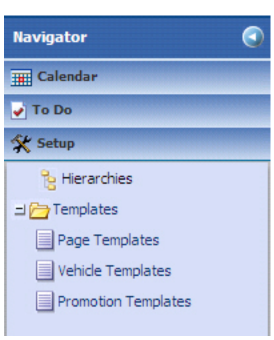
Page templates are associated with individual pages of vehicle templates.

Viewing Page Templates

To view page templates:

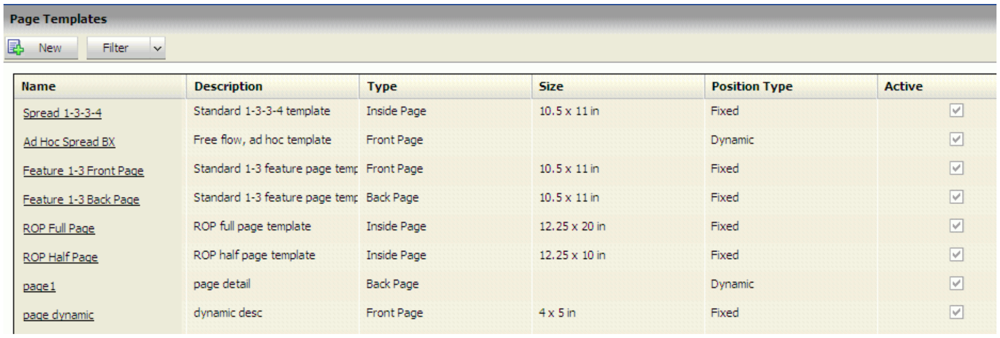
1. Select **Setup** from Navigator. Expand the Templates folder.

Figure 3–1 Navigator Setup Section



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

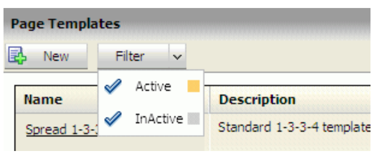
Figure 3–2 Page Templates List



Name	Description	Type	Size	Position Type	Active
Spread 1-3-3-4	Standard 1-3-3-4 template	Inside Page	10.5 x 11 in	Fixed	☑
Ad Hoc Spread BX	Free flow, ad hoc template	Front Page		Dynamic	☑
Feature 1-3 Front Page	Standard 1-3 feature page temp	Front Page	10.5 x 11 in	Fixed	☑
Feature 1-3 Back Page	Standard 1-3 feature page temp	Back Page	10.5 x 11 in	Fixed	☑
ROP Full Page	ROP full page template	Inside Page	12.25 x 20 in	Fixed	☑
ROP Half Page	ROP half page template	Inside Page	12.25 x 10 in	Fixed	☑
page1	page detail	Back Page		Dynamic	☑
page dynamic	dynamic desc	Front Page	4 x 5 in	Fixed	☑

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

Figure 3–3 Page Templates List Filter

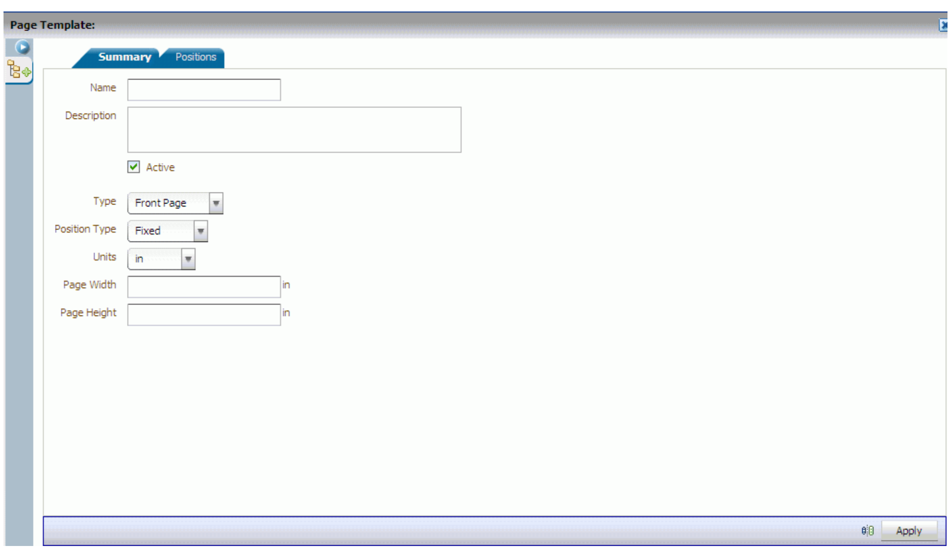


Creating a New Page Template

To create a new page template:

1. Click **New**. The Page Template window opens.

Figure 3–4 Summary Tab of the Page Template Window



Summary Tab

Enter the following on the Summary tab of the Page Template window:

1. **Name**—enter a name for the template.
2. **Description**—Enter an optional description of the template.
3. Leave Active selected to allow this template to be associated with vehicle templates.
4. **Type**—select the page type from the Type field.
5. **Position Type**—select the Position Type from the following options:
   - Fixed—positions will have set locations on the page template.
   - Dynamic—positions are fit onto the page automatically.

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

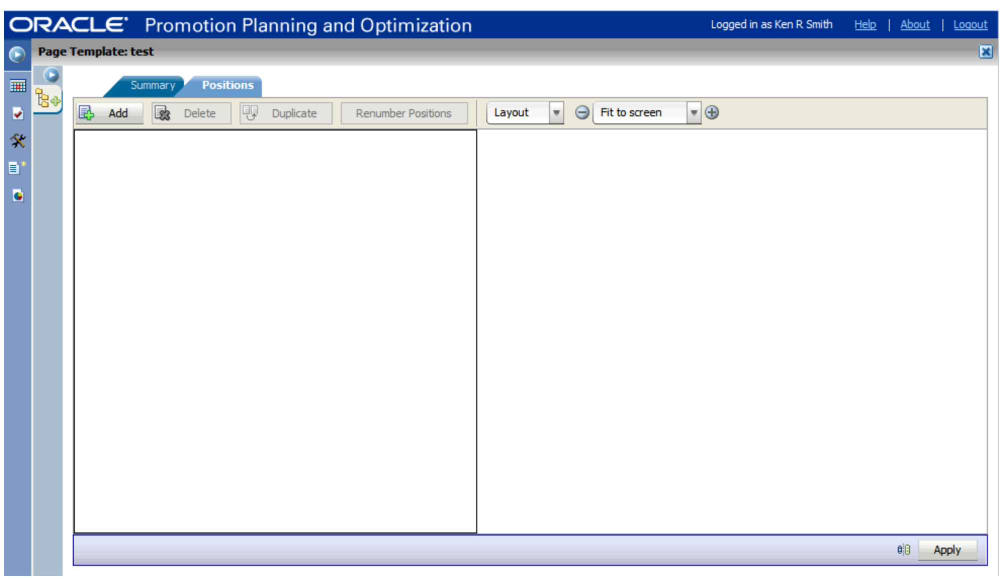
   ---

6. **Units**—select the measurement units to use on the page template.
7. **Page Width (required)**—enter the width of page in the Width field.
8. **Page Height (required)**—enter the height of the page in the Height field.
9. Click **Apply**.

Positions Tab

The Positions tab of the Page Template window is used to add and organize positions on the page template. You can view positions using Layout or List view.

Figure 3–5 Positions Tab of the Page Template Window



- Adding a Position to a Page on page 3-4.
- Removing a Position from a Page on page 3-4.
- Creating Copies of a Position on page 3-4.

- Using Drag and Drop to Set Position Block Dimension and Position Using Layout View on page 3-4.
- Duplicating Page Positions on page 3-5.
- Renumbering Page Positions on page 3-6.

Adding a Position to a Page To add a position to a layout page or list:

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

Removing a Position from a Page To remove a position block from a layout page or list:

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

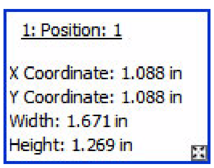
Creating Copies of a Position To create a copy of a position block:

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

Using Drag and Drop to Set Position Block Dimension and Position Using Layout View To set the dimensions and position of a position block using drag-and-drop while in layout view:

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

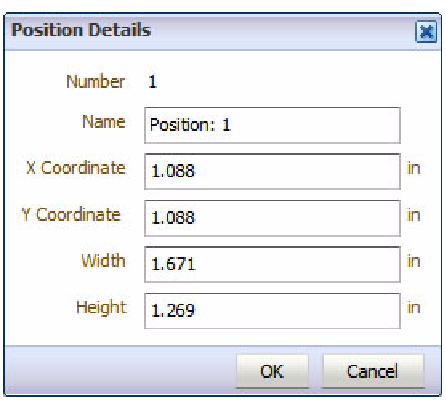
Figure 3–6 Position Block



Manually Setting Position Block Dimension and Position Using Layout View To set the dimensions and location of a position block manually in layout view:

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

Figure 3–7 Position Details Window



2. **Name**—enter a descriptive name for the position block.

3. **X Coordinate**—enter the X location (left/right) of the position block.
4. **Y Coordinate**—enter the Y location (up/down) of the position block.

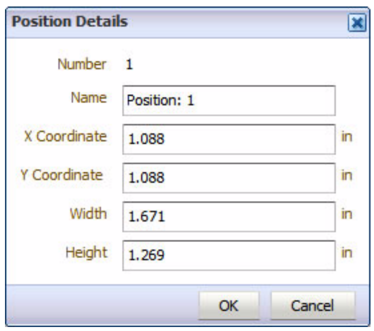
> **Note:** An X:Y location of 0: 0 is the upper left corner of a page.

5. **Width**—enter the width of the position block.
6. **Height**—enter the height of the position block.
7. Click **OK**. The position block moves to the specified location on the page.

Manually Setting Position Block Dimension and Location Using List View To set the dimensions and location of a position block manually in List view:

1. Click on the position number link. The Position Detail window opens.

Figure 3–8 Position Details Window



2. **Name**—enter a descriptive name for the position block.
3. **X Coordinate**—enter the X location (left/right) of the position block.
4. **Y Coordinate**—enter the Y location (up/down) of the position block.

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

5. **Width**—enter the width of the position block.
6. **Height**—enter the height of the position block.
7. Click **OK**.

Duplicating Page Positions To duplicate page positions:

1. On the **Positions** tab, click the position you want to duplicate.
2. On the toolbar, click **Duplicate**.

   A new position with the same dimensions as the original position is placed. You can choose to move it to the location you want.
3. Click **Apply** to save your changes.

Renumbering Page Positions Once you have completed working on the page positions, you can use the Renumber Positions button to renumber the positions on a page and sort them based on the X-Y axes co-ordinates.

Note: The *promote.page.renumberTopDown* parameter in the *promote.properties* configuration file sets the renumbering to sort based on "y,x" (top and down) or "x,y" co-ordinates. For more information on this parameter, refer to the *Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Configuration Guide*.

To renumber page positions:

1. On the **Positions** tab, click **Renumber Positions** in the toolbar.

   The page layout gets updated to reflect the position numbers sorted based on the order set in the configuration parameter.

2. Click **Apply** to save your changes.

Deactivating a Page Template

To deactivate a page template:

1. Select the template from the template list. Click the name. The Summary window opens.
2. Deselect the Active checkbox.
3. Click **Apply**.
4. Click the "X" in the upper right corner to return to the Page Template list.

Vehicle Templates

Vehicle templates allow you to create and use standard promotion vehicles such as circulars, TV ads, and in-store displays. Each page of a vehicle template can be associated with a page template. A vehicle template is then associated with a promotion template.

Use the Vehicle Templates section of Setup to edit existing templates, create new templates, and deactivate templates.

Note: Each page template associated with a particular vehicle template should use the same unit of measure for page height and width.

For more information regarding vehicle templates, refer to the following sections:

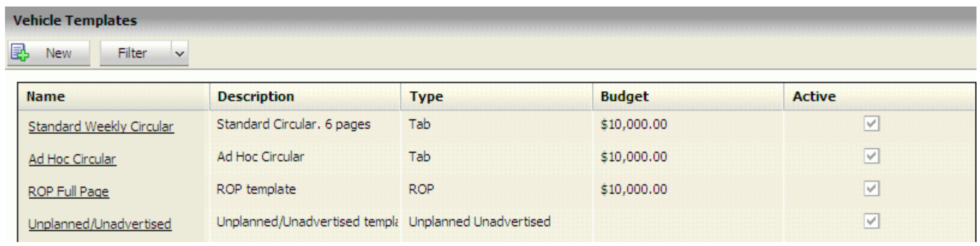
- Viewing Vehicle Templates on page 3-7.
- Creating New Vehicle Templates on page 3-7.
- Modifying Vehicle Templates on page 3-12.
- Adding Pages to a Vehicle Template on page 3-10.
- Removing Pages from a Vehicle Template on page 3-11.

Viewing Vehicle Templates

To view vehicle templates:

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

Figure 3–9 Vehicle Templates List


Vehicle Templates

New Filter

Name	Description	Type	Budget	Active
Standard Weekly Circular	Standard Circular. 6 pages	Tab	$10,000.00	✓
Ad Hoc Circular	Ad Hoc Circular	Tab	$10,000.00	✓
ROP Full Page	ROP template	ROP	$10,000.00	✓
Unplanned/Unadvertised	Unplanned/Unadvertised templ	Unplanned Unadvertised		✓

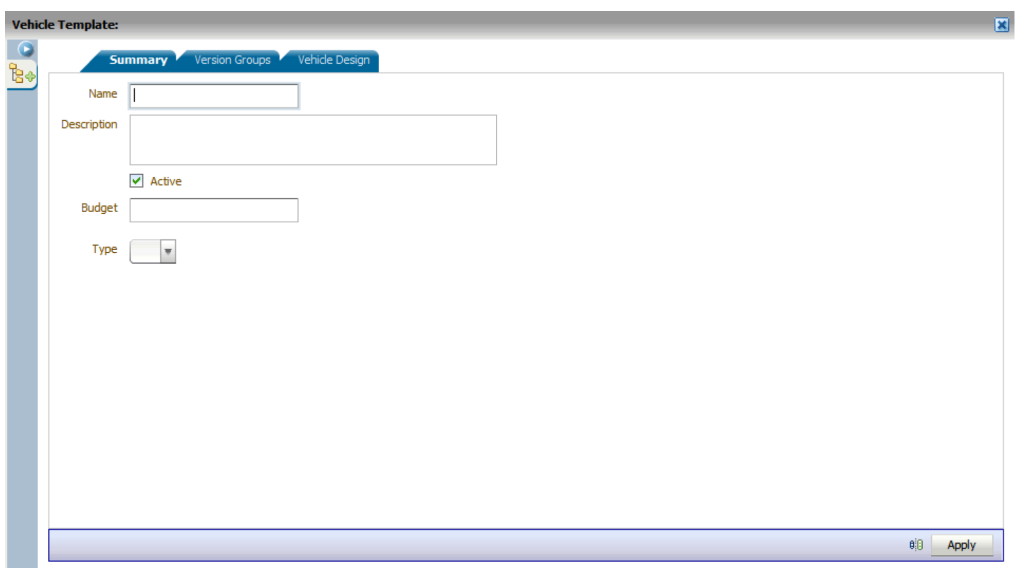
3. Filter the vehicle template list to include or exclude active or inactive templates. Select Active or Inactive. A check mark will appear before the types of templates appearing on the list.

Creating New Vehicle Templates

To create a new vehicle template:

1. From the Promotion Manager Vehicle Templates List, click **New**.
2. The Vehicle Template window opens.

Figure 3–10 Summary Tab of the Vehicle Template Window



Summary Tab

Use the Summary tab of the vehicle template window to add information to your vehicle template. Complete the following when creating a new vehicle template.

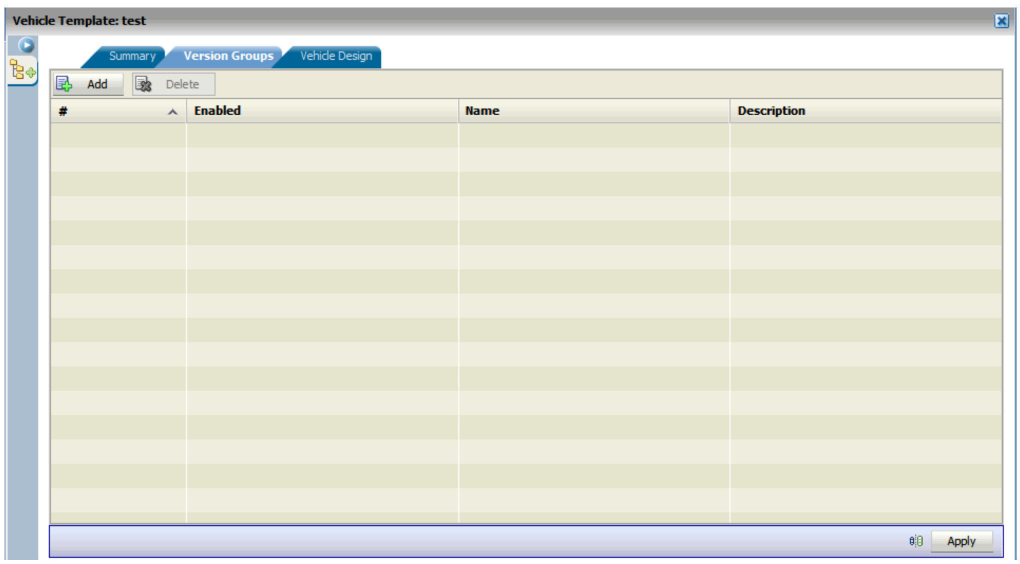
1. **Name**—enter a name for the template.

2. **Description**—(optional). Enter a description of the template.
3. Leave the Active checkbox selected to allow this template to be associated with promotion templates.
4. **Budget**—enter a value for the budget.
5. **Type**—select the kind of vehicle this template is for from the Type field.
6. Click **Save**.
7. To add page templates to you new vehicle template, see Adding Pages to a Vehicle Template on page 3-10.

Version Groups Tab

Use the Versions Groups tab to create versions of your vehicle template for use in different locations. For more information on version groups and the Version Groups screen, see Version Groups.

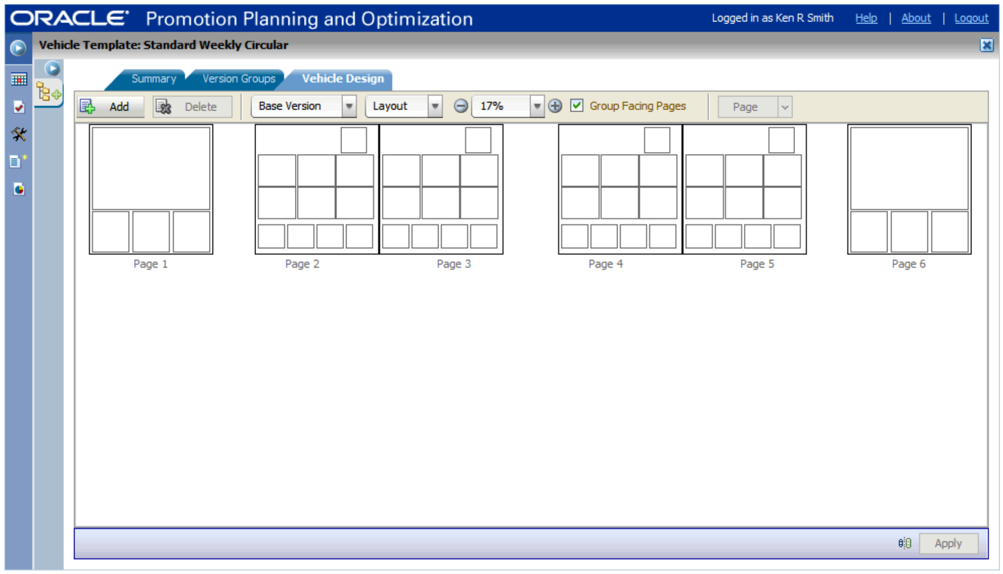
Figure 3–11 Version Groups Tab of the Vehicle Template Window



Vehicle Design Tab

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

Figure 3–12 Vehicle Design Tab of the Vehicle Templates Window



From the details tab, you have the ability to do the following:

- Viewing Vehicle Template Designs on page 3-9.
- Adding Pages to a Vehicle Template on page 3-10.
- Removing Pages from a Vehicle Template on page 3-11.

Note: If you select a vehicle template that has inactivated pages, you will also see the words "Page template is not active" written across the page template. If you place your mouse over an inactive page template, the following tooltip will be displayed "The page must be deleted or a new page template assigned in order to save and use the vehicle template."

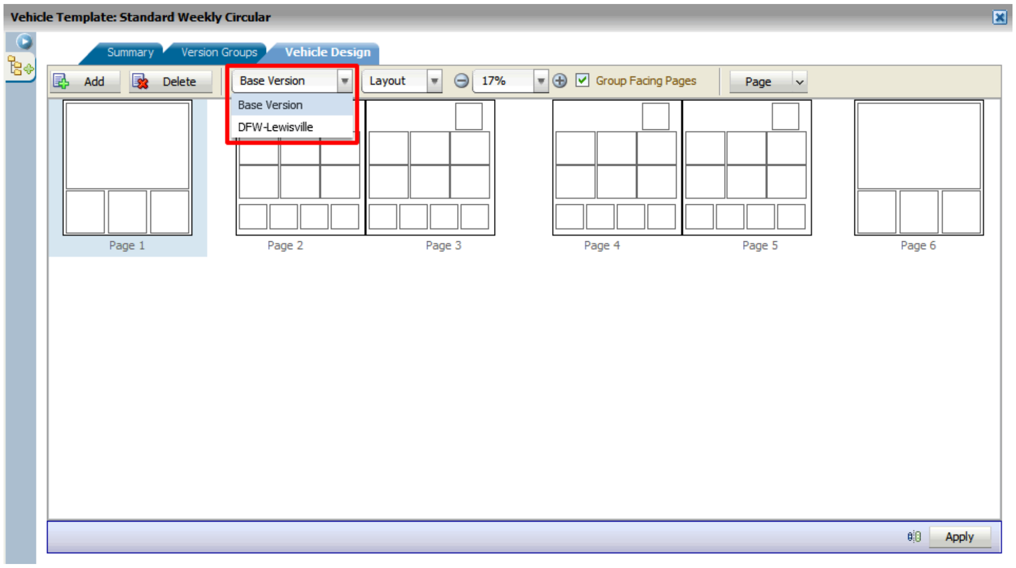
Viewing Vehicle Template Designs To view the design of a vehicle template:

1. Select a vehicle template from the vehicle template list or create a new vehicle template.
2. Select the Vehicle Design tab.
3. Select list or layout view to view the page templates attached to the vehicle template.

Viewing the Vehicle Template Design Versions To view the vehicle template design for a version other than the base version:

1. On the Vehicle Design tab, select the version you want.

Figure 3–13 Viewing Vehicle Template Version



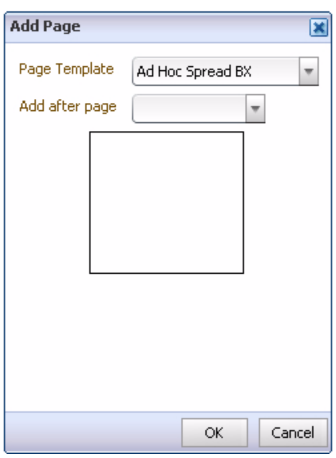
2. Select list or layout view to view the page templates attached to the vehicle template.

Adding Pages to a Vehicle Template To add a page template to a vehicle template in layout or list view:

> **Note:** Each page template associated with a particular vehicle template should use the same unit of measure for page height and width.

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

Figure 3–14 Add Page Window



2. **Page Template—**select a page template to associate with the new page.

Note: You will not be able to make any changes to the vehicle template if you associate an inactive page template to the vehicle template.

---

3. Click **OK**.
4. Repeat this procedure to add additional pages.
5. When you are finished adding pages, click **Apply**. Click **Close** to exit.

Removing Pages from a Vehicle Template To remove a page from a vehicle template in layout or list view

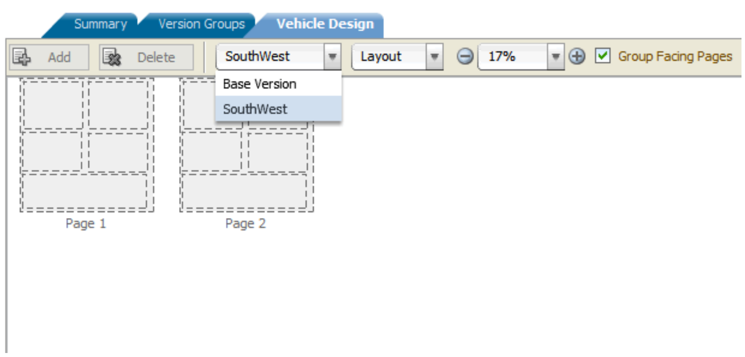
1. Select the page.
2. Click **Delete**. The page is removed from the template.

Changing the Page Template To change the page template:

1. Click once onto the desired page to select it.
2. From the **Page** drop-down menu, click the **Edit Page** option.

Overriding a Page The List and Layout Views on the Vehicle Design tab also reflect the inherited pages for versions other than the base version. For more information, see Inherited Pages.

Figure 3–15 Inherited Pages Appearing on the Vehicle Design Tab



To override an inherited page:

1. Click once onto the desired page to select it.
2. From the **Page** drop-down menu, click the **Override Page** option.

A new blank position is created with the same page and position number. It inherits the co-ordinates from the base position that has the same position number. If the base position is renumbered, all position overrides are updated to the new position number so they continue to override the block at the same location.

The position overrides inherit the base position co-ordinates and size. When the base position is moved or resized, the change is reflected in the overriden positions as well. If a base position is deleted, the relevant position overrides are deleted.

A position override can be removed by clicking **Delete** in the toolbar.

Modifying Vehicle Templates

Use the Vehicle Design tab to reorder and change page templates on a vehicle template. Within the Vehicle Design tab, you have the following options:

- Moving a Page in List or Layout View on page 3-12.
- Changing Page Template Assignment on page 3-12.

Moving a Page in List or Layout View

To move a page in layout or list view:

- Drag the page to a different location on the Vehicle Design tab.

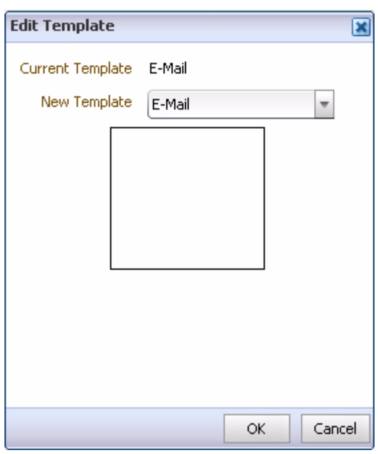
> **Note:** Pages with inactive templates cannot be dragged and dropped until the inactive pages are made active. If you attempt to drag and drop an inactive page, you will receive the following error message: "This vehicle contains one or more pages with inactive templates. These pages must be deleted or assigned new page templates before any pages can be removed."

Changing Page Template Assignment

To change the template assigned to a page:

1. Select the page in layout or list view.
2. From the **Page** drop-down menu, click **Edit Page**. The Edit Page window opens.

Figure 3–16 Edit Template Window



3. **New Template—**select a new template to use.
4. Click **OK**. The template for the page is changed.

Promotion Templates

Promotion templates allow you to create and use standard promotions. Promotion templates contain the default tasks and milestones in the workflow. A promotion template may have one or more vehicle templates associated with it depending on the application configuration.

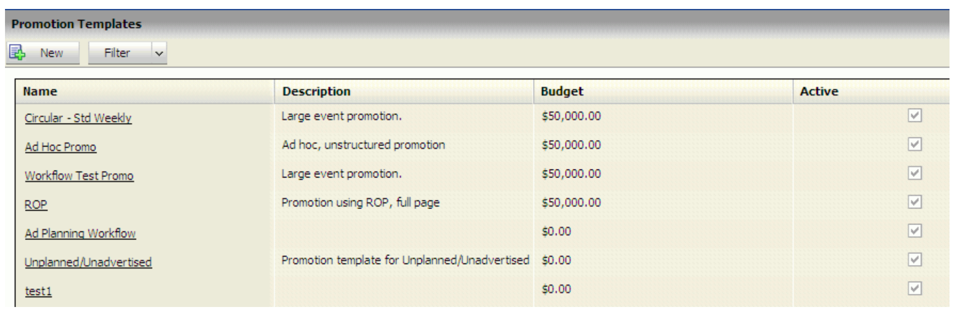
For more information about promotion templates, see the following:

Viewing Promotion Templates

To view Promotion templates:

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

Figure 3–17 Promotion Templates List



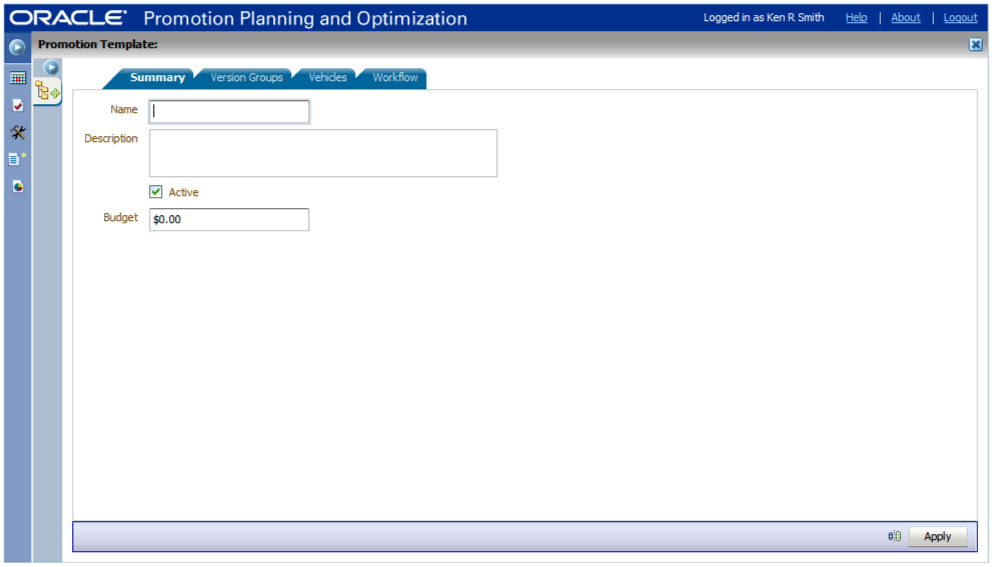
3. Use the Filter drop down menu to filter the promotion template list to include or exclude active or inactive templates. A check mark will appear for the types of templates appearing on the list.

Creating a Promotion Template

To create a promotion template:

1. From the Promotion Manager Template window, click **New**.
2. The Promotion Template window opens:

Figure 3–18 Summary Tab of the Promotion Template Window



Summary Tab

Use the Summary tab of the promotion template window to add information to your promotion template.

Complete the following fields:

1. **Name**—enter a name for the template.
2. **Description**—enter an optional description of the template.
3. Leave the Active checkbox selected to allow this template to be associated with promotions.
4. **Budget**—enter a budget amount for the promotion.
5. Click **Apply**.
6. Additional options within the Promotion Template window:
   - To exit the template and return to the Promotion Template list, click the "X" in the upper right corner of the Promotion Template window.
   - To assign Versions, click the Version Groups tab of the Promotion Template window. See "Version Groups Tab" on page 3-14 for more information.
   - To assign Vehicles, click the Vehicles tab of the Promotion Template window. Fore more details, see "Vehicles Tab" on page 3-15.
   - To enter Worflow details, click the Workflow tab of the Promotion Template window. See "Workflow Tab" on page 3-16.

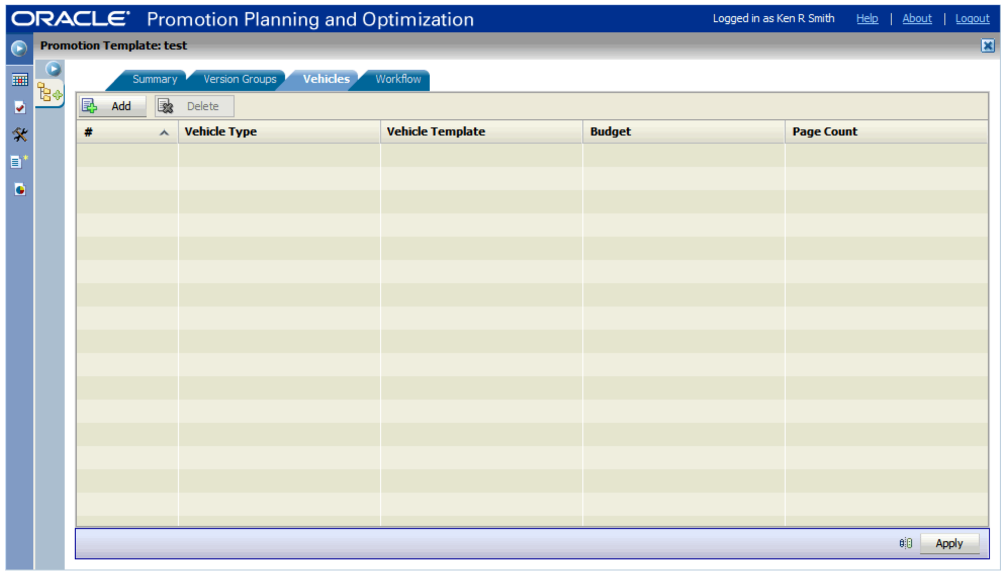
Version Groups Tab

Use the Version Groups tab of the Promotion Template window to assign locations or store set to your promotion template. For more information on version groups and the Version Groups screen, see Version Groups.

Vehicles Tab

Use the Vehicles tab of the Promotion Template window to add one or more promotion vehicles.

Figure 3–19 The Vehicles Tab of the Promotion Template Window

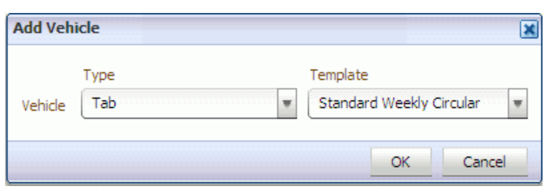


Adding Vehicles

To add a vehicle, complete the following steps:

1. Click **Add**. The Add Vehicle dialog box opens:

Figure 3–20 The Add Vehicle Dialog Box



2. **Type**—select a Vehicle Type from the drop–down list.
3. **Template**—select a Vehicle Template from the drop–down list.
4. Click **Ok**.

Deleting Vehicles

To delete a vehicle from a Promotion Template, complete the following steps:

1. From the list of vehicles, click once onto a vehicle to highlight it.
2. Click **Delete**. A confirmation message appears.
3. Click **OK** to delete the vehicle from the promotion template.

Workflow Tab

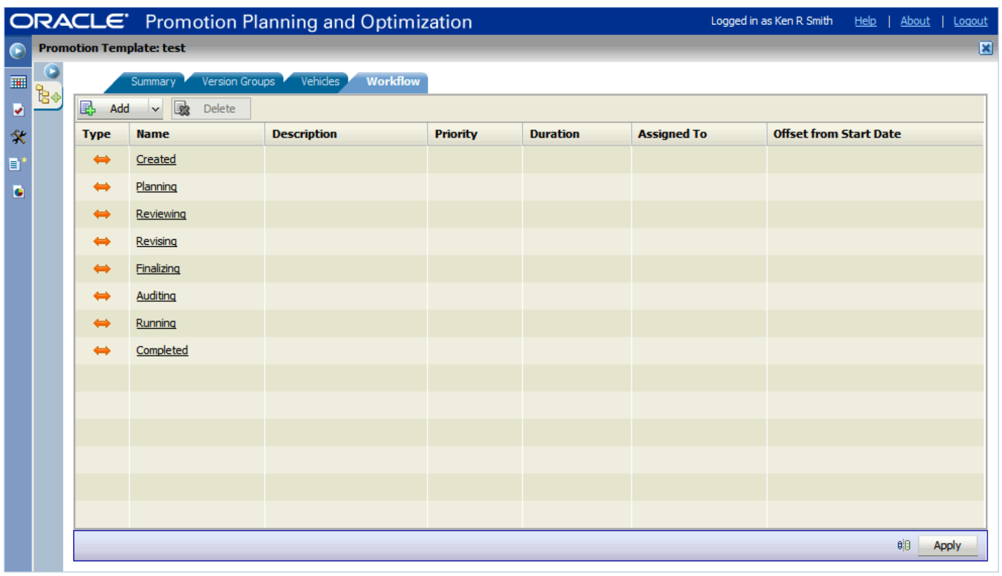
Use the workflow feature to design a work process for the promotion template. The following options are available:

- Phases on page 3-16.
- Tasks on page 3-17.
- Milestones on page 3-19.

To open the workflow window:

1. Open a promotion template.
2. Select the Workflow tab. The workflow window opens.

Figure 3–21 Workflow Tab of the Promotion Template Window



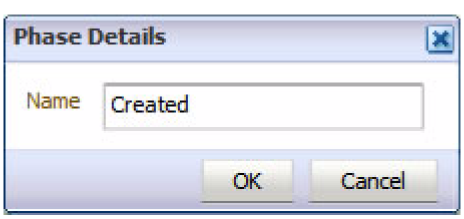
Phases

Use the information below to modify workflow phases.

Changing Phase Names To change the name of a phase:

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

Figure 3–22 Phase Details Window



2. **Name**—click into this field and edit the name of the Phase.
3. Click **OK**. The updated phase name now appears in the workflow list.

Tasks

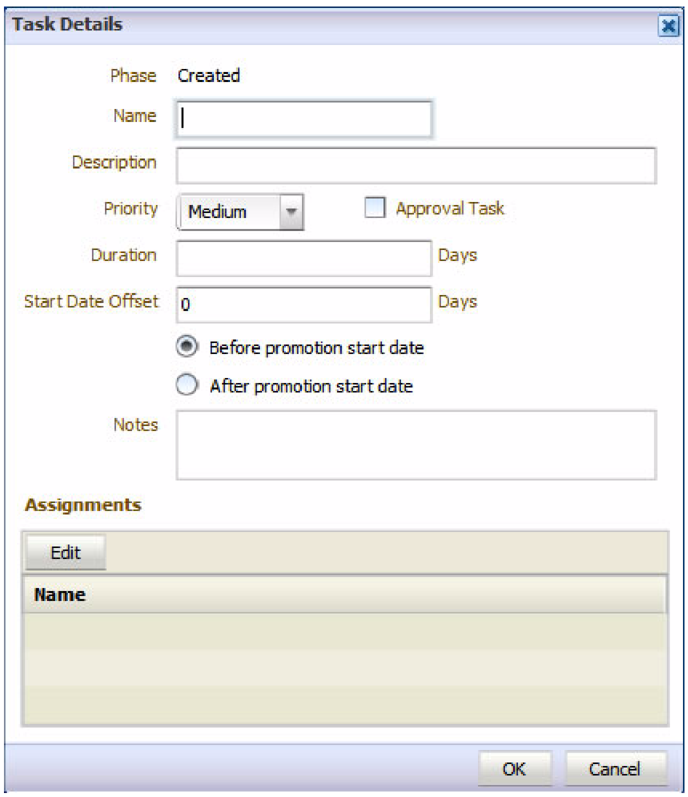
The following options are available for workflow tasks:

- Adding Tasks on page 3-17.
- Modifying Tasks on page 3-18.
- Editing Existing Task Details on page 3-18.
- Removing Tasks on page 3-19.

Adding Tasks To add a task to the workflow:

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

Figure 3–23 Task Details Window

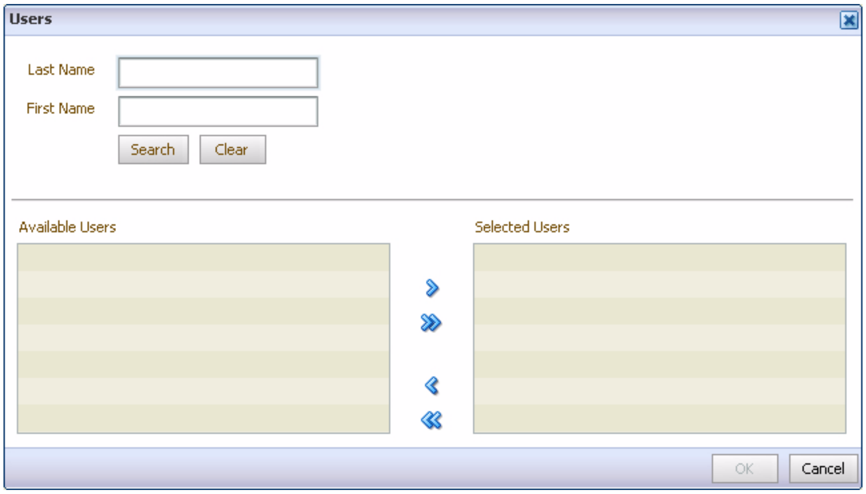


3. **Name**—enter a name for the task.
4. **Description**—enter optional details of the task.
5. **Priority**—select the relative importance of the task.
6. Select the Approval Task checkbox if the task is an approval task.
7. **Duration**—enter the length of time in days that the task should take.
8. **Start Date Offset**—enter the number of days that the task should start in relation to the promotion start date.
   - Before Promotion Start Date—select this option if the task should start before the promotion start date.

- After Promotion Start Date—select this option if the task should start after the promotion start date.

9. **Notes**—enter optional considerations for the task.
10. **Assignments**—assign the task to users.
    a. Click **Edit** from the Assignments table. The Users Search window opens.

Figure 3–24 Users Search Window



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

Modifying Tasks To modify a task:

1. Select the task.
2. Drag the task to a different location on the workflow list. You can move a task within our outside of its current phase. If you move a task outside the current phase, the phase will be updated with the new phase.

Editing Existing Task Details To edit the details of an existing task:

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

Removing Tasks To remove a task:

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

Milestones

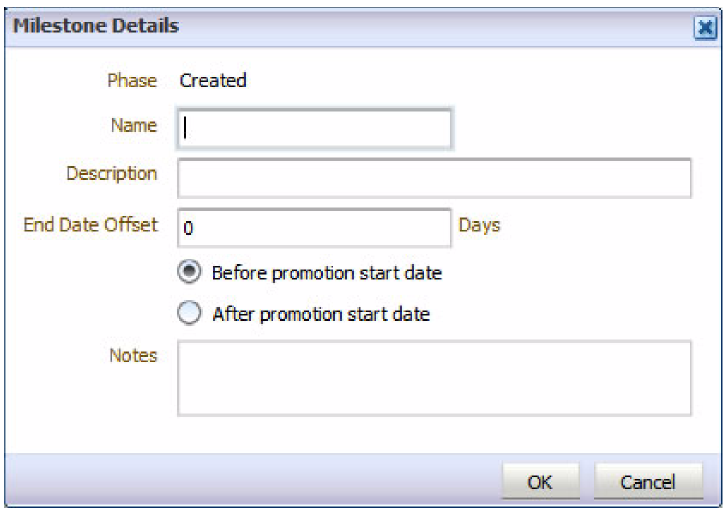
The following options are available for milestones:

- Adding a Milestone on page 3-19.
- Modifying a Milestone on page 3-19.
- Removing a Milestone on page 3-20.

Adding a Milestone To add a milestone to the workflow:

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

Figure 3–25 Milestone Details Window



3. **Name**—enter a name for the milestone.
4. **Description**—enter optional details for the Milestone.
5. **End Date Offset**—enter the number of days from the promotion start date when the milestone must end.
   - Before Promotion Start Date—select this option if the milestone should start before the promotion start date.
   - After Promotion Start Date—select this option if the milestone should start after the promotion start date.
6. **Notes**—enter optional considerations for the milestone.
7. Click **OK**. The milestone appears on workflow list.

Modifying a Milestone To move a milestone:

1. Select a milestone.

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

Removing a Milestone To remove a task or milestone from the workflow:

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

4

Campaigns and Events

Campaigns define the overall theme for a series of promotions. Use them to group multiple promotions together. Use events to provide context for planning your campaigns and promotions. The use of campaigns in Promotion Planning and Optimization is optional.

Campaigns

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

You can create campaigns from the following two areas:

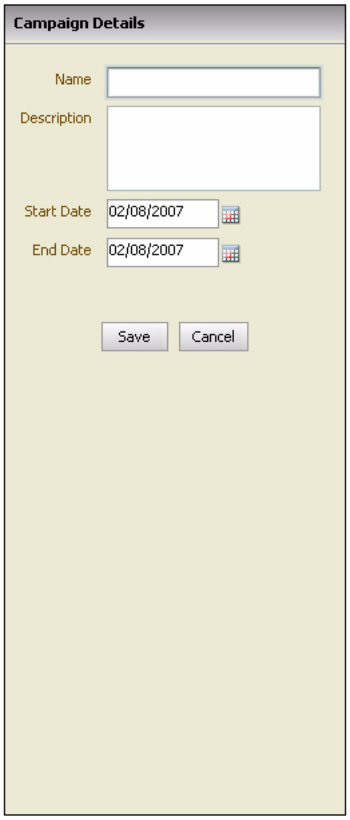
1. Calendar—for more information about creating campaigns from the calendar, see Creating Campaigns from the Calendar on page 4-1.
2. Navigator—for more information about creating campaigns from the navigator, see Creating Campaigns from the Navigator on page 4-2.

Creating Campaigns from the Calendar

To create a campaign from the calendar

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

Figure 4–1 Campaign Details Window



3. **Name**—enter a name for the campaign.
4. **Description**—enter details about the campaign.
5. **Start Date**—enter when the campaign will begin.
6. **End Date**—enter when the campaign will end.
7. Click **Save**. The campaign is added to the calendar.

Creating Campaigns from the Navigator

To create a campaign from Navigator:

1. Select the Calendar section of Navigator.
2. Click **Create Campaign**. The Campaign Details window opens.
3. Follow steps 3-7 within Creating Campaigns from the Calendar on page 4-1 to finish creating a new campaign.

Events

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

1. Calendar—for more information about creating an event from the calendar, see Creating an Event from the Calendar on page 4-3.

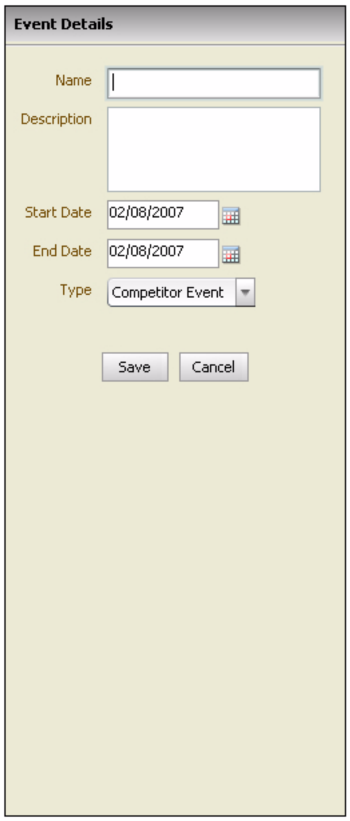
2. Navigator—for more information about creating an event from the navigator, see Creating an Event from the Navigator on page 4-4.

Creating an Event from the Calendar

To create an event from the calendar:

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

Figure 4–2 Event Details Window



3. **Name**—enter a name for the event.
4. **Description**—enter details of the event.
5. **Start Date**—enter when the event will begin.
6. **End Date**—enter when the event will stop.
7. **Type**—select one of the following event types:
   - Competitor Event
   - Company Event
   - Personal Event
8. Click **Save**. The event is added to the calendar.

Creating an Event from the Navigator

To create an event from Navigator:

1. Select the Calendar section of Navigator
2. Click **Create Event**. The Event Details window opens.
3. Follow steps 3-8 from Creating an Event from the Calendar on page 4-3 to finish creating a new event.

5

Promotions

Promotions are the individual events or advertising that retail businesses use to drive increased sales. Promotions can be planned on their own or associated with a marketing campaign. For more information about Campaigns, see Campaigns on page 4-1.

Creating and maintaining Promotion events may take place over a period of time by multiple users. Multiple users can collaborate and edit different portions of a promotion at the same time.

Note: Depending on your role within Promotion Planning and Optimization, you may or may not have permission to edit or view particular features of a promotion.

Creating Promotions

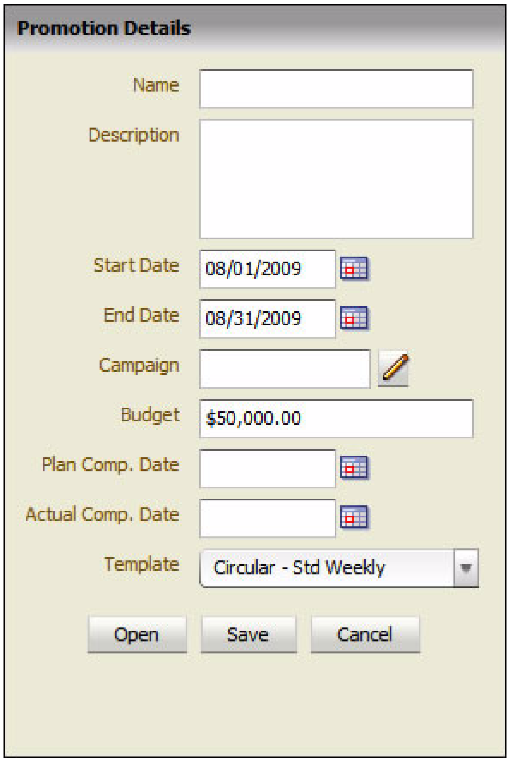
Promotions can be created from the Calendar or the Navigator. Once created, all promotions are accessible from the Calendar.

Creating Promotions from the Calendar

To create a promotion from the calendar:

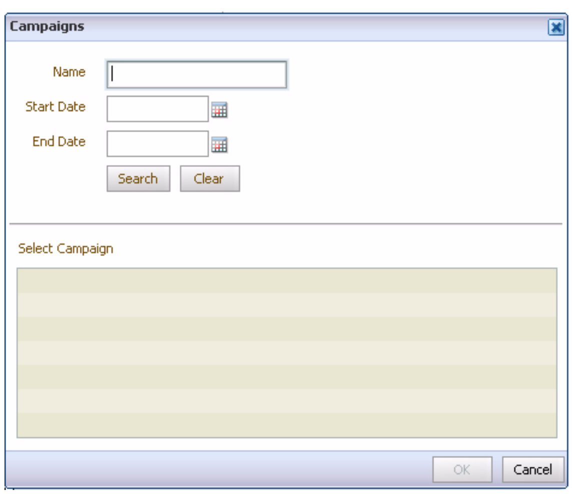
1. Click **New**.
2. Select **Promotion**. The Promotion Details window opens to the right.

Figure 5–1 Promotion Details Window



3. **Name**—enter a name for the promotion.
4. **Description**—enter a description for the promotion.
5. **Start Date**—enter the date when the promotion will begin.
6. **End Date**—enter the date when the promotion will end.
7. If your promotion is part of a campaign, select the campaign from the Campaign field.
   a. Click the Search button (Pencil icon). The Campaigns search window opens.

Figure 5–2 Campaigns Search Window



   b. Enter search values.

- **Name**—enter all or part of the campaign name.
- **Start Date**—select a Start Date
- **End Date**—select an End Date

c. Click **Search**. Campaigns matching the search criteria appear in the Select Campaign list.

d. Select a campaign.

e. Click **OK**. The campaign is added to the promotion.

8. **Budget**—enter an amount.
9. **Plan Comp. Date**—use this field to set the date when the promotion is scheduled to be completed.
10. **Actual Comp. Date**—use this field to record the actual date when the promotion was completed.
11. **Template**—select a promotion template.

Note: If you select a promotion template that has inactivated pages, you will receive an error message as follows: "The promotion template you have chosen contains errors and cannot be used. One possible reason is that it contains pages with inactivated page templates."

12. Click **Open** to save the promotion and to add details to it. Click **Save** to save the promotion and return to the Calendar.

Creating Promotions from the Navigator

To create a promotion from the Navigator:

1. Select the Calendar section of the Navigator.
2. Click **Create Promotion**. The Promotion Details window opens.
3. Refer to Creating Promotions from the Calendar on page 5-1 for instructions on how to enter information on the new promotion form.

Opening an Existing Promotion

Promotions can be opened immediately after they are created or directly from the Calendar. You may only open one promotion at a time.

To open a promotion from the calendar:

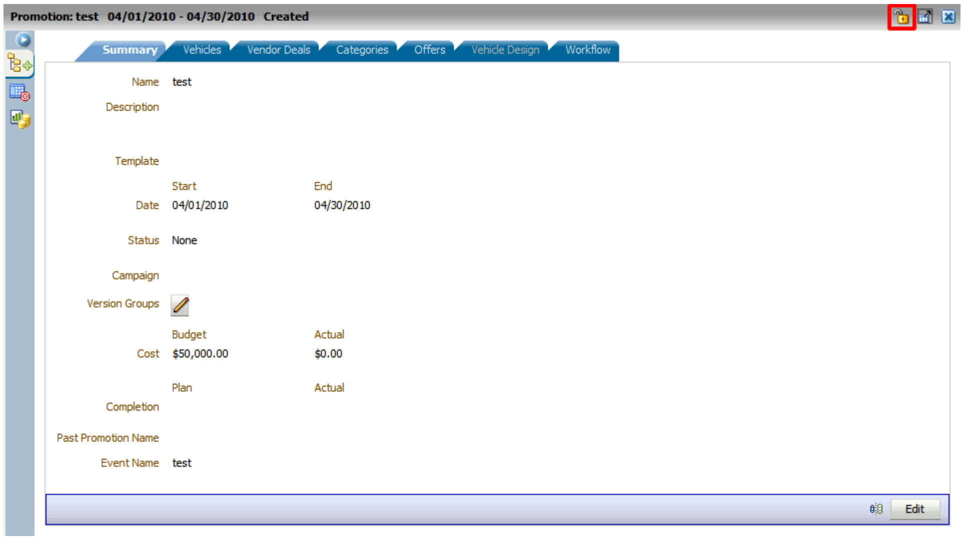
1. Click once onto the name of the promotion in the Promotion Manager. The Promotion Details window opens to the right.
2. Click **Open**. The Promotion Manager changes to a tabbed window with the Summary tab open.

Exclusive Locking

In a promotion, many operations require you to have an exclusive lock on the promotion. An unlocked lock icon appears on the right side of the toolbar when a promotion is first opened.

To lock a promotion, you must click the Lock icon. A locked lock icon indicates that the promotion is locked exclusively by an user.

Figure 5–3 Lock Icon on the Toolbar

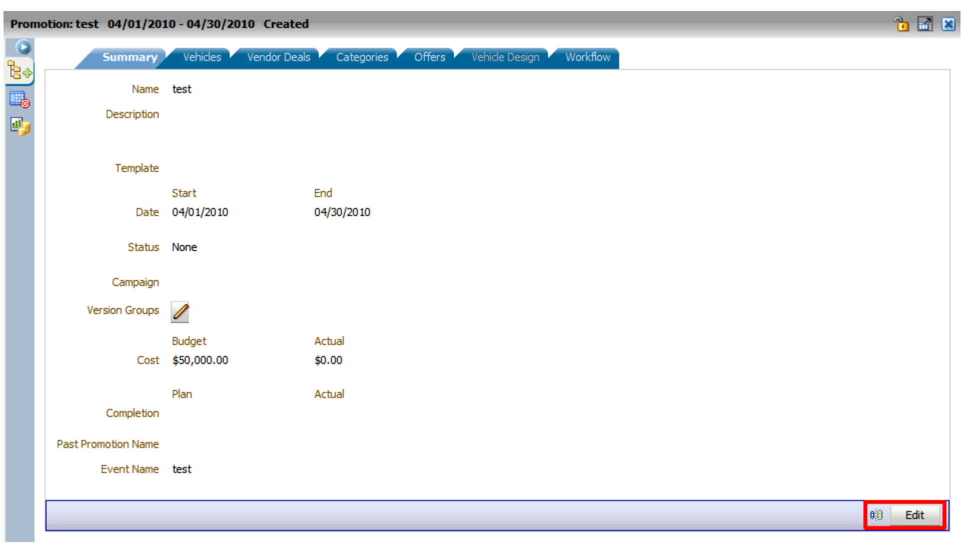


To release a lock on the promotion, you must click the Lock icon again.

Hovering the mouse cursor over the Lock icon displays the current lock state of the promotion and it's meaning. The Lock icon is greyed out and disabled when any pop-up window or slider panel is open.

You can also see audit information associated with the Summary tab by selecting the audit icon located next to the Edit button.

Figure 5–4 Audit Icon Next to the Edit Button



The Promotion Manager

The Promotion Manager allows you to design and add details to your promotions. It also mirrors the workflow for creating promotions with Promotion Planning and Optimization.

The Promotion Manager contains the following tabs:

- Summary—provides summary level information about a promotion. For more information, see Summary on page 5-5. create different versions of your promotion for use in multiple locations. Locations can be defined using the Location Hierarchy or store set. For more information, see Adding Version Groups on page 5-8.
- Vehicles—define one or more vehicles for use within your promotion. For more information, see Vehicles on page 5-12.
- Vendor Deals—Vendor Deals for your promotion can be added and managed on this tab. For more information, see Vendor Deals on page 5-14.
- Categories—assign categories of merchandise to your promotion. For more information, see Categories on page 5-17.
- Offers—create and define offers for your promotion. For more information about the Offers tab, see Offers on page 5-18.
- Vehicle Design—use the vehicle design tab to create the layout for your promotion. It is also possible to assign categories and create offers within this tab. For more information, see Vehicle Design on page 6-1.
- Workflow—assign tasks and keep track of promotion activities. For more information, see Workflow on page 7-1.

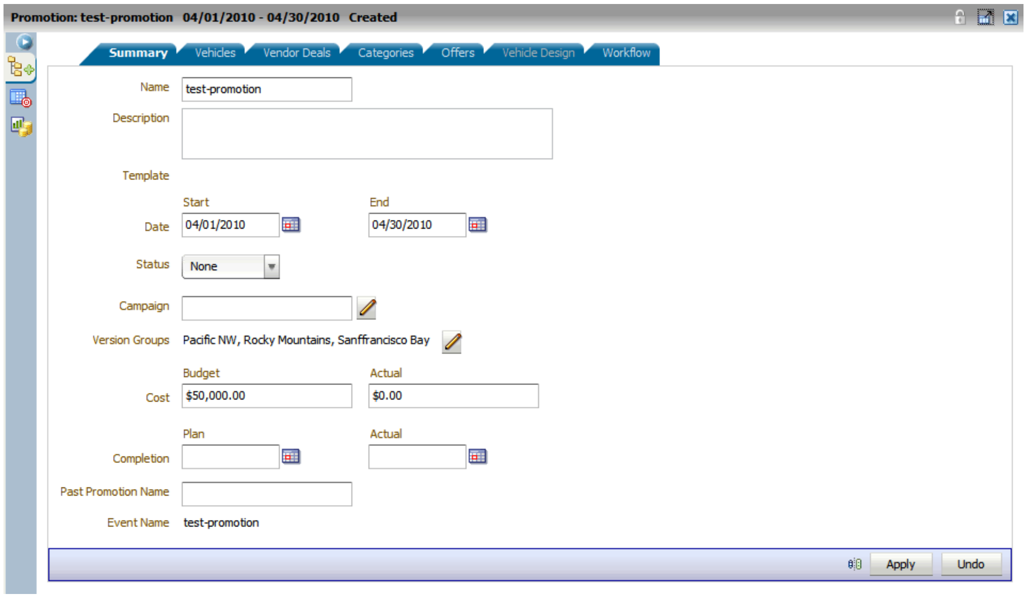
Summary

The Summary tab of the Promotion Manager displays descriptive information for the promotion. You can edit information on the Summary window if you have the Ad Planner role within Promotion Planning and Optimization. The bottom of the Summary window displays the Audit Details button that enables you to view the name of the owner, creator, and the last person to modify the promotion as well as the dates of creation and last modification.

To add summary details to a promotion:

1. Open an existing promotion from the Promotion Calendar or create a new promotion. The Promotion Manager opens. Select the Summary Tab.
2. Click **Edit** to get an exclusive lock on the promotion.

Figure 5–5 Promotion Manager Summary Tab



3. **Status**—select the status of the promotion.
4. **Campaign**—associate your promotion with a campaign. Click the pencil icon to select a campaign.
5. **Version Groups**—to define version groups for your promotion, see "Version Groups" on page 5-7.
6. **Actual**—enter the actual cost of the promotion if it is known.
7. (optional) **Completion**—enter the planned and actual completion dates.
8. (optional) **Past Promotion Name**—if this promotion is similar to a previous one, enter the name of the previous promotion.
9. Click **Apply** to update the promotion with the information.

   Or

   Click **Undo** to revert back any unsaved changes and release the lock on a document without closing it. The Undo button is always enabled, unless you have locked the promotion exclusively.

   Or

   Click **Cancel** (appears on the top right corner of screen) to revert any unsaved changes and close a screen (applies to pop-up windows and slider panels).
10. Click on other tabs within the Promotion Manager window to enter additional information.

Version Groups

Version groups enables you to define and group multiple versions where each version group is associated with multiple locations or store subsets. Version groups can be defined using the Version Groups screen that appears in the following areas of the application:

- For a promotion, the Version Groups screen appears when you click the Edit button next to the Version Groups field on the Summary tab of the Promotion Manager. For more information, see Summary.
- For a promotion Vehicle, the Version Groups tab on the Vehicle Details window. For more information, see Vehicles.
- For a promotion template, the Version Groups tab on the Promotion Templates screen. For more information, see Promotion Templates.
- For a vehicle template, the Version Groups tab on the Vehicle Templates screen. For more information, see Vehicle Templates.

Within a version group, the following restrictions apply for each version:

- A version group can be associated with store set or locations, but not both.
- A version group can be associated with only one store set.
- A version group cannot have different locations with a common hierarchy relationship. For example, Boston and Massachusetts will not appear in the same version group.

Understanding the Version Groups User Interface

Although the Version Groups screen appears at different places, it offers the same functionality across the application. The Version Groups screen has the following components:

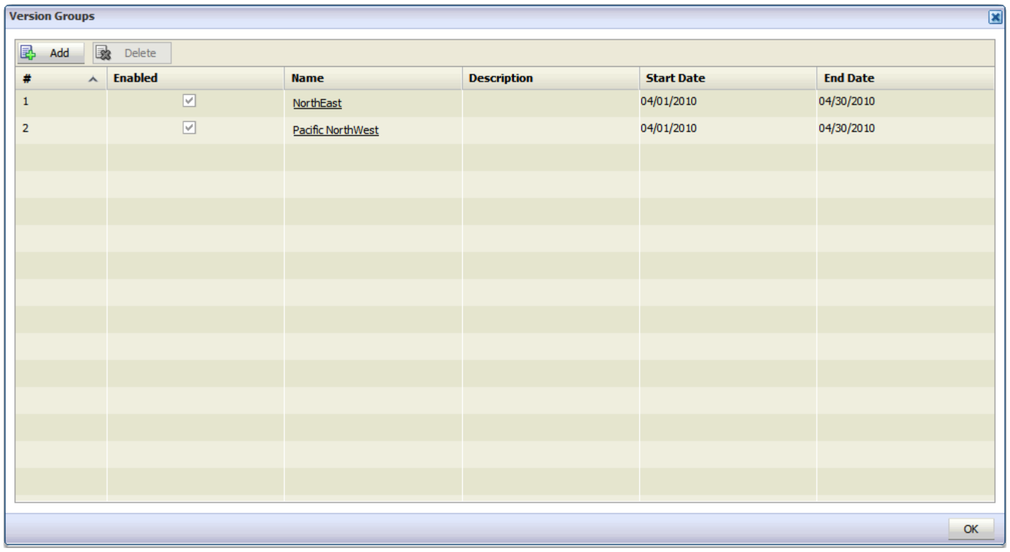
- Toolbar - includes the Add and Delete buttons.
- Columns - includes the following columns:

Table 5–1 Columns in the Version Groups Screen

Column	Description
#	Order in which the version group was added.
Enabled	Indicates that the version group is enabled.
Name	Name of the version group.
Description	Description of the version group.
Start Date	Start date for the version group.
End Date	End date for the version group.

> **Note:** Start and End Dates for a version group are typically inherited from the promotion or promotion vehicle. Version Groups screen enables you to override these inherited dates and set up specific dates for each version group.

Figure 5–6 Version Groups User Interface



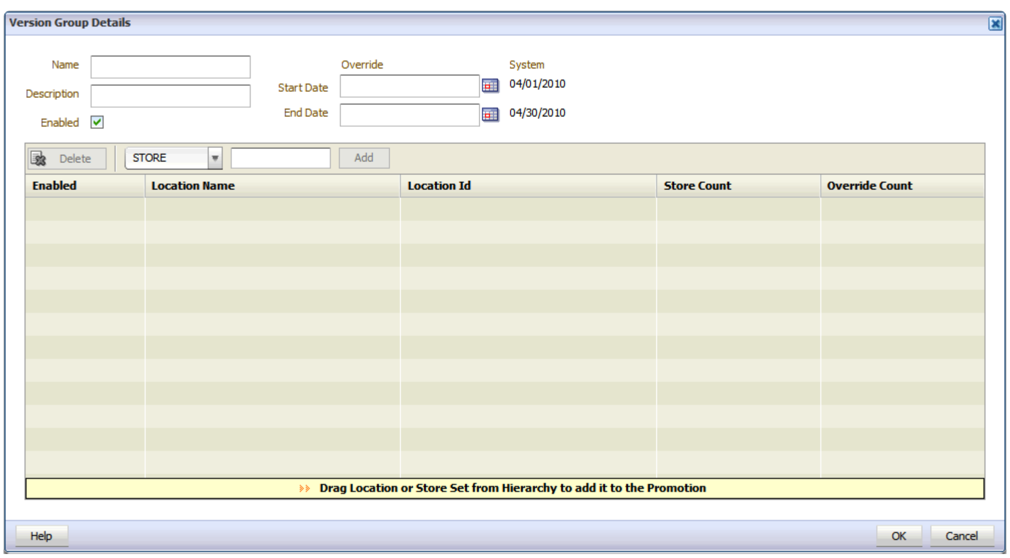
Adding Version Groups

To add a version group:

1. On the **Version Groups** panel, click **Add**. The **Version Group Details** window appears.

Note: The Add button is enabled when you have an exclusive lock on the promotion. To obtain an exclusive lock on the promotion, see Exclusive Locking on page 5-3.

Figure 5–7 Version Group Details Window



2. On the **Version Groups Details** window, enter the name and description for the version group.
3. Click the **Enabled** check box to enable the version group.

4. From the Vertical tab, select the Hierarchy Selector. Alternatively, you can simply expand the Vertical tab. The Hierarchy Selector appears by default.
5. To add locations, store set, or store subsets to a version group, from the Store Set or Locations hierarchy, select the store set, store subsets, or locations. You can select multiple items from the hierarchy.

   OR

   You can also use the Quick Add feature to add locations or store set. Once you select the relevant option from the drop-down menu, enter the relevant name in the field, and click Add.

> **Note:** Version groups can created with no locations or store subsets defined. You can choose to add them at a later point by editing the version group.

6. Drag and drop the selected items to the bar labeled **Drag Location or Store Set from Hierarchy to add it to the Promotion**.
7. Optionally, you can also choose to override the start and end dates for each version group.
8. Click **OK**.

Multiple Locations Consideration

When selecting and dragging multiple locations, only valid locations (no common hierarchy relationship between the selected locations) are added and a message appears that lists the locations that were not added.

Multiple Store Subsets Consideration

Although the store subset is dragged to the drop target area, all the store subsets of the associated store set also appear in the Version Group Details window. The dragged store subset will appear enabled, where as the other store subsets appear disabled.

When selecting multiple store subsets, since a version can be associated with only one store set, you cannot select multiple store subsets from different store set.

Editing Version Groups

To edit a version group:

1. On the Version Group panel, under the Name column, click the name of the version group. The Version Group Details window appears.

> **Note:** You must have an exclusive lock on the promotion to edit the versions.

2. Along with changing the name, description, start date, and end date, you can add, delete, or replace locations or store subsets. You can also choose to enable or disable store subsets or locations.

To delete location or store subsets associated with a version group, select the rows in the Version Group Details window, and click Delete.

Note: Delete button only applies to the location rows. For store set associated with a version group, a Delete icon appears next to the store set name which will delete the store set. Store subsets can be deleted individually.

Deleting Version Groups

To delete a version group:

Note: You must have an exclusive lock to delete the version groups.

1. On the **Version Group** panel, select multiple rows by holding the **CTRL** or **SHIFT** keys and clicking the rows you want to delete.
2. Click **Delete**. A confirmation message appears.

Note: The Delete button is enabled when you select one or more rows in the Version Groups panel.

3. On the confirmation message window, click Yes to confirm the delete operation.

Replacing Locations, Store Set, Store Subsets in a Version Group

Grouping the locations, store set, or store subsets in a version group enables you to replace the locations, store set, or store subsets by changing the association in the version group without losing any content.

You can replace locations, store set, store subsets in the following ways:

- Replace locations with a store set by dragging the store set to the drop target area in the Version Groups Detail window or use the quick add fields. Dragging a store set to a version group with locations replaces all the locations and associates the version group with the store set. All the store subsets of the store set appear in the Version Groups Detail window, enabled by default.
- Replace locations with store subsets by dragging the store subsets to the drop target area in the Version Groups Detail window.

  Dragging a store subset to a version group with locations replaces all the locations and associates the version group with the corresponding store set. The Version Group Details window includes all store subsets associated with the store set. Only the store subsets that were dragged to the drop target area appear enabled.
- Replace store set or store subsets in a version group by dragging the locations from the location hierarchy to the drop target area in the Version Groups Detail window or use the quick add fields. This associates the version group with the selected locations.
- Replace store set or store subsets in a version group by dragging another store set to the drop target area in the Version Groups Detail window or use quick add fields. This associates the version group with the new store set and replaces all the existing store subsets with the store subsets from the dragged store set. All the store subsets of the dragged store set appear in the Version Groups Detail window, enabled by default.

Note: Dragging the same store set as the existing one resets all the store subsets to be enabled.

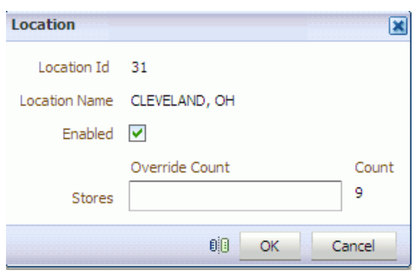
- Replace store set or store subsets in a version group by dragging a store subset from a different store set to the drop target area in the Version Group Detail window or using the quick add fields. This associates the version group with the corresponding store set of the store subset. Although all store subsets of the corresponding store set appear in the Version Group Details window, only the store subset that was dragged appears enabled.
- Reset all the store subsets in the version group by dragging a store subset from the same store set already associated with the version group to the drop target area in the Version Group Details window. This enables the store subset that was dragged and the other store subsets appear disabled.

Overriding Store Counts for Locations

To override the store count for a given location:

1. Open an existing promotion. An exclusive lock is required.
2. From the Summary Tab of the Promotion Manager, click the Version Groups pencil icon.
3. From the Version Group Details window, select a Location from the list. Click once onto its hyperlink from the Location Name column.
4. The **Location Details** window opens. The current store count is displayed next to the Stores field.

Figure 5–8 Location Details Window



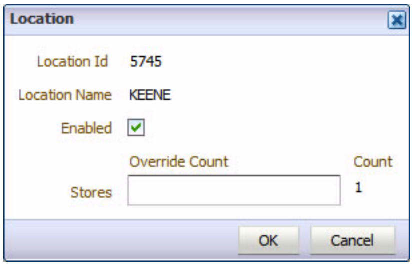
5. **Stores**—enter an override value.
6. Click **Ok** to save. Click **Ok** to exit the Version Group Details window.

Overriding Store Counts for Store Set

To override the store count for a store set, complete the following steps:

1. Open an existing promotion in single user mode. An exclusive lock is required.
2. Select the **Versions** tab in the Promotion Manager. The Store Set currently assigned to the promotion appear.
3. To select a store set, click onto its hyperlink from the Name column.
4. The **Location** window opens.

Figure 5–9 Store Set—Overriding Store Count



5. **Stores**—enter a new value for the store count.
6. Click **Ok**. The store set count is updated.

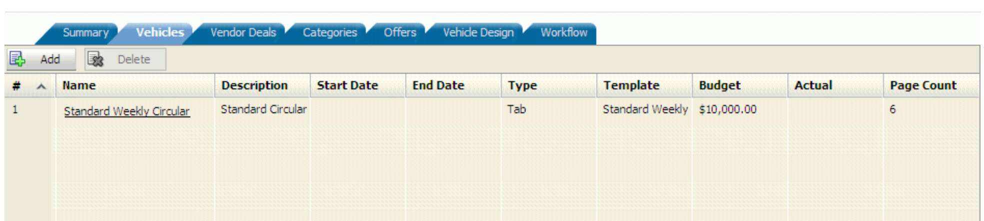
Vehicles

Use the Vehicles tab of the Promotion Manager to add vehicles, select vehicle types and templates, set vehicle specific Demand Drivers, and assign vehicle specific store set or locations.

About the Vehicles Tab

The Vehicles tab of the Promotion Manager displays all vehicles in use for a promotion. If the promotion uses versions, the vehicles associated with the promotion will be enabled for use in these versions. However, the option to disable the promotion version and assign vehicle–specific versions is available.

Figure 5–10 The Vehicles Tab of the Promotion Manager



The Vehicles Tab displays the following information about assigned vehicles:

Table 5–2 Promotion Manager Vehicles Tab

Field	Description
#	Order in which the vehicle was added to the promotion.
Name	The name of the vehicle.
Description	Description of the vehicle.
Start Date	Start date of the vehicle for use within the promotion.
End Date	End date of the vehicle for use within the promotion.
Vehicle Type	The vehicle type of the vehicle.
Vehicle Template	The vehicle template currently in use by the vehicle.
Budget	Budget for the vehicle.
Actual	Actually amount spent for the budget.

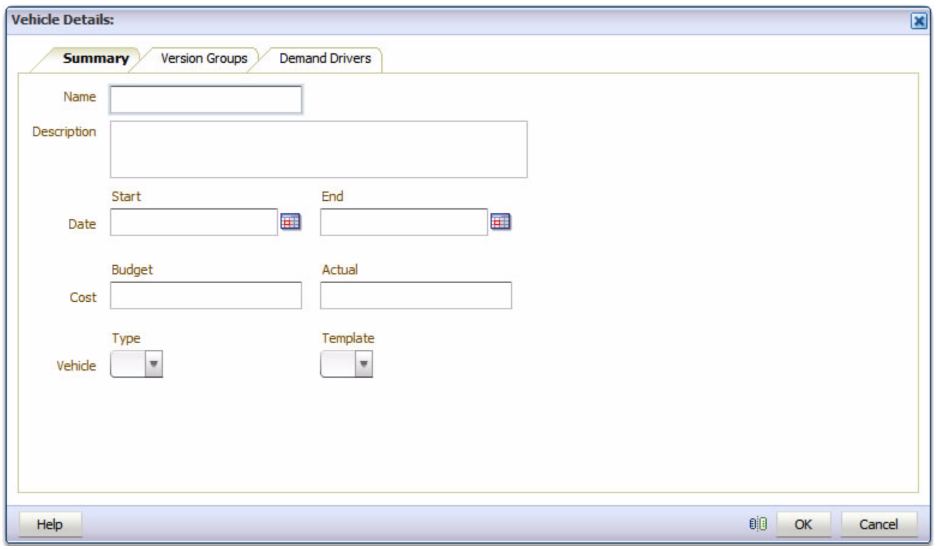
Table 5–2 (Cont.) Promotion Manager Vehicles Tab

Field	Description
Page Count	The number of pages present within the vehicle.

About the Vehicle Details Window

The Vehicle Details Window is used to assign new vehicles to a promotion or to modify the properties of an existing vehicle.

Figure 5–11 Summary Tab on the Vehicle Details screen



It contains three tabs as follows:

- Summary—enter details for your vehicle including the vehicle type and template you wish to use.
- Version Groups—use this tab to override promotion version groups and assign vehicle specific version groups. By default, if version groups are assigned to the promotion, all vehicles assigned to the promotion will also use the same version groups. For more information on Version Groups and using the Version Groups screen, see Version Groups.
- Demand Drivers—this tab contains the demand drivers that are specific to your company's installation of Promotion Planning and Optimization.

Adding Vehicles

To add a vehicle to a promotion, complete the following steps:

> **Note:** You must have an exclusive lock on the promotion to add or edit a vehicle and add or edit version groups in a vehicle.

1. From the Vehicle Tab, click **Add**. The Vehicle Details window opens.
2. On the Summary Tab of the Vehicle Details window, complete the following fields:
   - **Name**—enter a name for the vehicle.

- **Description**—enter a description.
- **Start Date**—enter a start date or use the calendar icon to select a date.
- **End Date**—enter an end date or use the calendar icon to select an end date.
- **Cost (Budget)**—enter a budget amount.
- **Cost (Actual)**—enter the actual cost of the vehicle. This field can be populated after the promotion ends for use in historical analysis.
- **Vehicle Type**—select a Vehicle Type from the list of available types.
- **Vehicle Template**—select a Vehicle Template from the list of available types.
- Click **Ok** to save your vehicle information or select the Version Groups tab to define version groups for your vehicle.

3. All vehicles defined for a promotion inherit the version groups assigned to the promotion. However, you can choose to override these version groups and specify version groups for each vehicle assigned to the promotion. For more information on working with version groups, see Version Groups.
4. The available demand drivers will depend on your implementation of Promotion Planning and Optimization. After selecting the desired options for your demand drivers, click **Ok** to return to the Vehicles tab.

Removing Vehicles

To remove a vehicle from a promotion, complete the following steps:

> **Note:** You must have an exclusive lock on the promotion to add or edit a vehicle and add or edit version groups in a vehicle.

1. Open a promotion. From the Promotion Manager, select the Vehicles Tab. The list of vehicles currently defined for the promotion appears.
2. Locate the desired vehicle. Click once onto the vehicle to highlight it.
3. Click **Delete**. The vehicle is removed from the promotion.

Vendor Deals

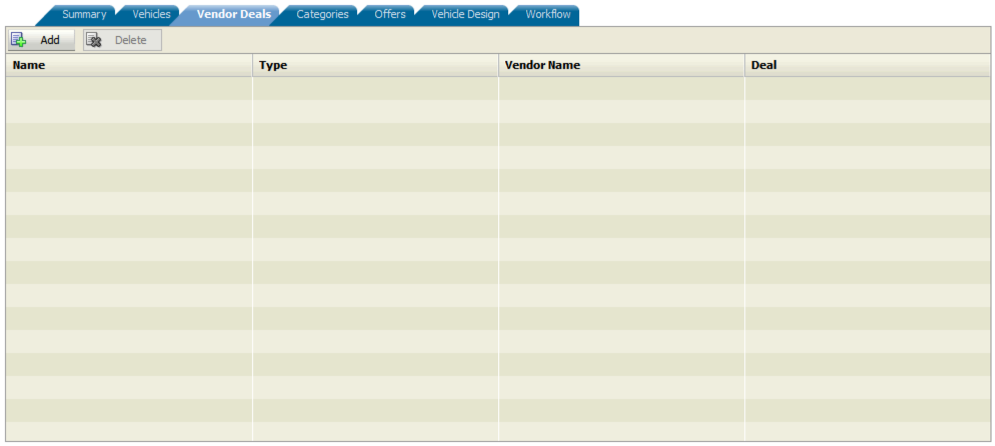
The Vendor Deals tab lists the deals you have with vendors for items on your promotion. Deals are listed in a table format. Depending on your role, you can add or delete vendor deals from the Vendor Deals window.

Adding a Vendor Deal

To add a vendor deal:

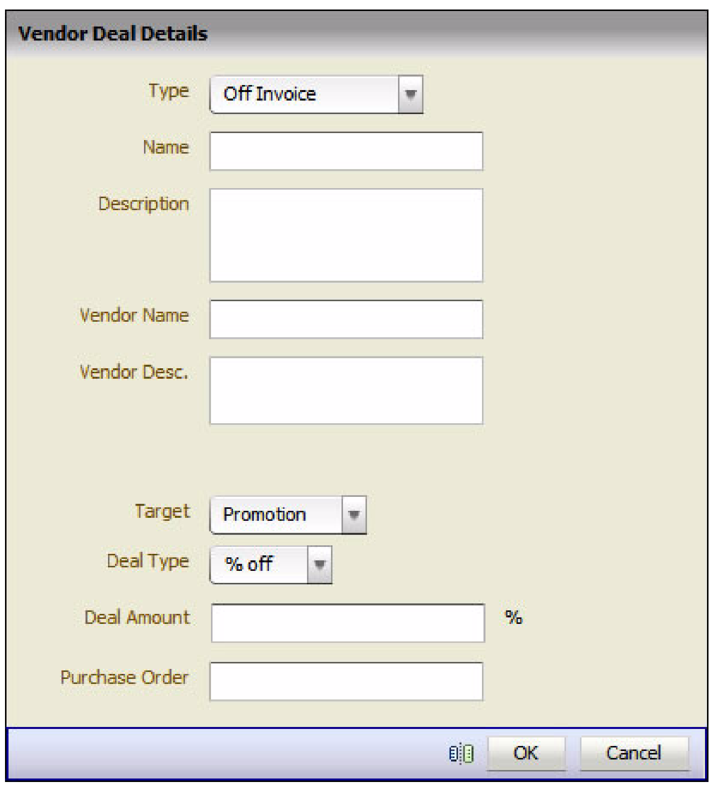
1. Open a promotion.
2. Select the Vendor Deals tab of Promotion Manager. The Vendor Deals window opens.

Figure 5–12 The Vendor Deals Tab of the Promotion Manager



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

Figure 5–13 Vendor Deal Details Window

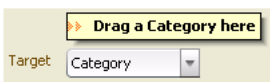


4. **Type**—select the type of vendor deal from the following options:
   - Off Invoice—You receive a percentage or monetary amount off a vendor or supplier invoice in exchange for advertising specific merchandise on a promotion.
   - Volume Purchase—a vendor or supplier agrees to provide vendor funding for promotional advertising after an agreed upon minimum monetary amount or quantity is purchased.

- Ad Space—the vendor agrees to pay you a percentage or monetary amount of an advertisement in exchange for something such as front page exposure.
- Presentation—the vendor agrees to pay you a percentage or monetary amount in exchange for stores presenting merchandise in a specific location such as an end cap.

5. **Name**—enter a name for the deal.
6. **Description**—enter details of the deal.
7. **Vendor Name**—enter the name of the vendor offering the deal.
8. **Vendor Desc**—enter a description about the vendor offering the deal.
9. **Target**—select the target of the deal from the following options:
   - Promotion
   - Category
     – Drag a category from the Merchandise Hierarchy to the Drag a Category here bar above the Target field.

Figure 5–14 Target Field



   - Item
     – Drag an item from the Merchandise Hierarchy to the Drag an item here bar above the Target field.

Figure 5–15 Target Field

10. The following is dependent on the Type of Vendor Deal you selected in Step 4:
    - For an Ad Space deal
      – Enter the minimum ad space in the Min Space% field.
    - For a Presentation deal
      – Enter the location in the Location field.
    - For a Volume Purchase deal
      – Enter the minimum volume to receive the deal in the Volume Min field.
      – Select the Unit of Measurement in Units or Dollars.
      – Select if the deal is at Purchase or Sales from the Taken at field.
11. **Deal Type**—select from the following options:
    - % Off (Percent off)
    - $ Off (Dollar off)
12. **Deal Amount**—enter the amount or percentage of the deal.
13. **Purchase Order**—enter an associated purchase order number.

14. Click **OK** to add the vendor deal to the list.

Deleting a Vendor Deal

To delete a vendor deal:

1. From the Vendor Deals tab, select the row of the deal to delete.
2. Click **Delete**.

Categories

Use the Categories tab within the Promotion Manager to add and delete categories from the promotion. Categories are added using the Merchandise Hierarchy.

The following topics are available:

- About the Categories Tab
- Adding Categories to a Promotion
- Deleting Categories from a Promotion

About the Categories Tab

The Categories tab displays all assigned categories for a promotion. Each category is listed by its name and id number. Two views are available for displaying categories. The first is List View, which is the default view and shows categories in a list. The second view, Chart View, displays all categories on a graph according to their performance metrics. For more information about the graph, see Graph on page 5-52.

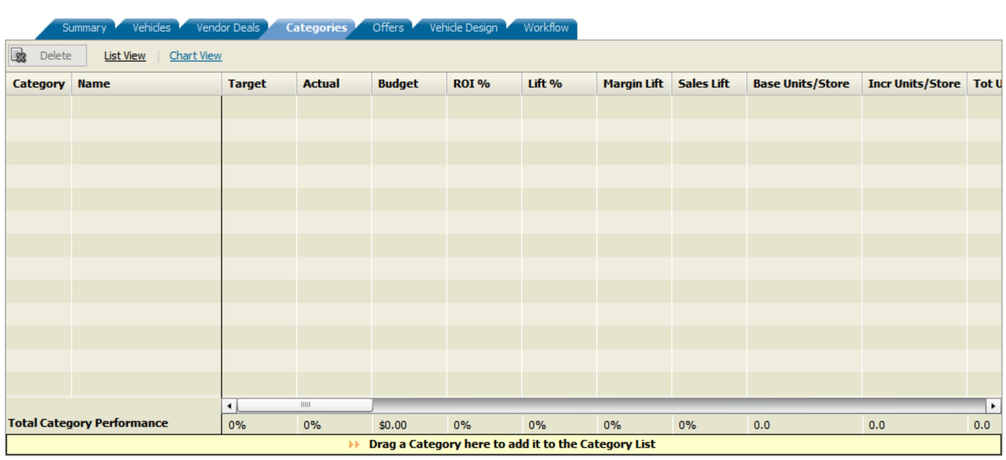
In addition, performance metrics are displayed for each individual category and for all categories. Information regarding these metrics is available in Categories—Individual Category Metrics on page A-1 and Categories—Total Category Performance Metrics on page A-3 in Appendix A "Performance Metrics".

Adding Categories to a Promotion

To add a category to a promotion:

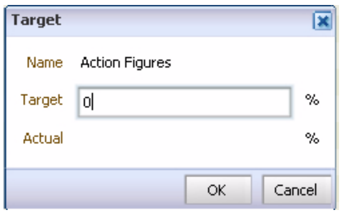
1. Select the Categories tab of the Promotion Manager. The Category window opens.

Figure 5–16 Promotion Manager Categories Tab



2. Using the Vertical Tab, open the Merchandise Hierarchy. Browse the Entire Hierarchy or use the Search option to search for categories by level of merchandise, such as class or subclass.
3. When you have located a category to add, drag and drop the category onto the bar labeled "Drag a Category here to add it to the Category List" at the bottom of the window. The category will now appear in the table.
4. Click the Target link in the Target column. The Target window opens.

Figure 5–17 Target Window



5. Enter a target space allocation percentage in the Target field. This is the percentage of space within the promotion that will be allocated to items in this category.
6. Click **OK**. The Target column is updated.

Deleting Categories from a Promotion

To delete a category from a promotion:

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

Note: If the category is already used in the Vehicle design for the promotion, it cannot be deleted. When you try to delete such categories, the following message appears:

'The data cannot be deleted. It is referenced by another part of the document."

Offers

Use the Offers tab within the Promotion Manager to create and manage offers for your promotion. A single offer can be placed multiple times depending on the number of vehicles and/or versions used within the promotion.

You can also search for offers from any existing promotion, copy it to the current promotion, and create a new offer.

Offer Attributes

Promotion Planning and Optimization extends support to the generic offers by appending attributes to it's offer types. Each offer type can be associated with a variable set of attributes. Offer attributes are specific to the offer type per offer or offer version and apply to all items in the offer. The application enables you to view and edit the offer attributes. For example, the offer may be "%Off" with no minimum buy requirement. But in a version, it may be required to have a fixed price with a minimum buy requirement.

For example, the following list illustrates some offer attributes that can be associated with the offer types:

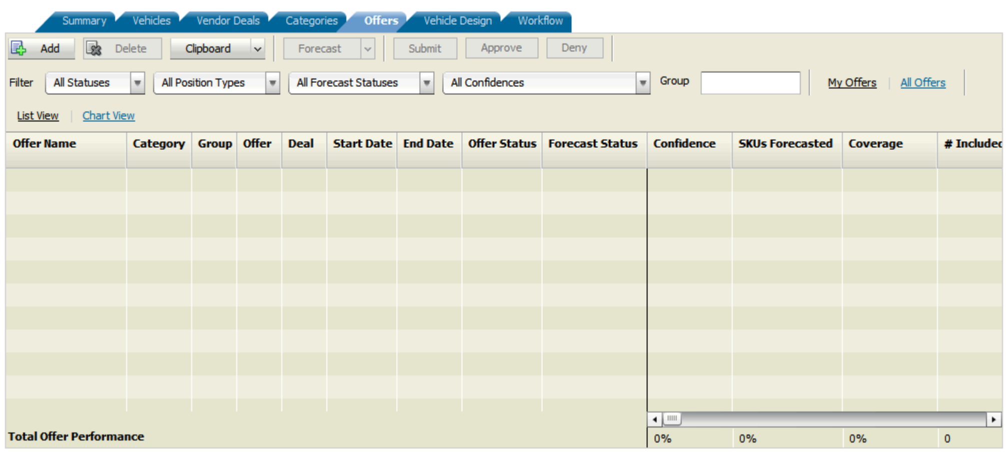
- Sale Price – Min Quantity, Buy Each, Loyalty Card, Extra Discount, Maximum Price, and Expiry Date.
- Buy One... – Wt. Less and Cost Less.
- Buy One... – Wt. Less and Cost Less.
- Discounted Price – Minimum Quantity and Coupon.
- Volume Quantity Price – Buy Quantity and Price.

Note: In this release, the application enables you to view and capture the offer attributes information. This information is useful for analysis and future forecast modelling updates.

About the Offers Tab

The Offers tab of the Promotion Manager lists all offers for a promotion.

Figure 5–18 Promotion Manager Offers Tab



For all offers listed within the Offers tab, the following information is available as described in Table 5–3.

Table 5–3 Offers Tab—Individual Offer Details

Field	Description
Offer Name	Name of the offer.
Category	The Category ID number of the Offer's assigned categories from within the Merchandise Hierarchy.
Offer	Value of the Offer (%Off, $Off, etc.)
Start Date	Date when the offer starts.
End Date	Date when the offer ends.
Deal	If a vendor deal has been defined, the amount of the vendor deal is displayed.

Table 5–3 (Cont.) Offers Tab—Individual Offer Details

Field	Description
Offer Status	Displays the offer's approval status (In Progress, Submitted, Approved, etc.) Select the status directly from the column to open the Offer status dialog window and change the offer's status or status notes. Note: You must have edit access to an offer in order to change its status.
Confidence	Indicates the level of confidence in the forecast metrics. For more information, see Forecast Confidence Indicator on page 5-21.
Forecast Status	The current status of the Offer's forecast. For more information, see Forecasting on page 5-49.
SKUs Forecasted	Indicates the number of SKUs in the offer that have a forecast
#SKUs	Number of SKUs contained within the offer.
#Versions	Number of versions for the offer. You can click on the value for the relevant offer to view more information on the versions.
#Positions	Number of positions for the offer. You can click on the value for the relevant offer to view more information on the positions.

Offers Tab Menu Options

The Offers tab provides access to the following functionality:

- Add—add a New Offer. The Add button appears with a drop-down menu with the following options:
  - Add New – Use this option to create a new offer. For more information about adding offers, see Adding An Offer on page 5-24.
  - Add from Offer – Use this option to copy an offer from an existing promotion. For more information, see Copying Offers on page 5-27.
- Delete—delete an existing offer. For more information about deleting an offer, see Deleting An Offer on page 5-32.
- Forecast—update the performance metrics for your promotion. For more information about the forecasting feature, see Forecasting on page 5-49.
- Submit—submit individual offers or all offers for submission. For more information, see Submitting An Offer on page 5-38.
- Approve—approve individual offers or all offers for approval. For more information, see Approving An Offer on page 5-39.
- Deny—reject individual offers or all offers. For more information about rejecting offers, see Rejecting An Offer on page 5-40.
- Total Offer Performance—view performance metrics for all of the Offers in your promotion.

Filters Use any of the following filters to change your view of the Offers Tab:

- Offer Status Filter—filter offers by their current submission status. Select from All Statuses, In Process, Submitted, Approved, or Denied. For more information about Submitting Offers, see Submitting, Approving, and Rejecting Offers on page 5-36.
- Positions Menu—use this menu to filter offers according to their position within the promotion vehicle. Display either All Position Types, Positioned or Unpositioned offers. For more information about positions, see Position Details Window on page 6-6.
- Forecast Status Menu—view offers according to their forecast status. For more information about the forecast status types, see Forecast Statuses on page 5-51.
- Confidence Filter—view offers according to their forecast confidence. Options include No Confidence, High, Medium, Low, User (No Confidence), User (Low System Confidence), User (Medium System Confidence), and User (High System Confidence). For more information about forecast confidence, see Forecast Confidence Indicator on page 5-21.
- Group—if offers have been assigned to groups, enter the name of the group and press enter to filter the list of available offers.
- My Offers—displays only the offers that you have the ability to edit. All other offers are excluded.
- All Offers—lists all offers in the promotion.
- List View—offers are displayed in a list.
- Chart View—offers are displayed in a graphical format.

Offer Metrics For more information regarding the metrics displayed within the Offers tab, see Offers—Individual Offer Performance on page A-5 and Offers—Total Offer Performance on page A-6.

Forecast Confidence Indicator Forecast confidence indicators are available to provide visibility into the accuracy of the system generated, forecast metrics. A column for forecast confidence is available within the following areas of Promotion Planning and Optimization:

- The Offers tab of the Promotion Manager.
- The Performance & What–If tab of the Offer Details window.
- SKU View and Version View of the Offer Definition tab of the Offer Details window.
- The Promotion Performance Metrics accessible from the Vertical Tab.
- The Offers tab of the Position Details window in the Vehicle Designer.

The following table provides the forecast confidence indicator icons and their definitions:

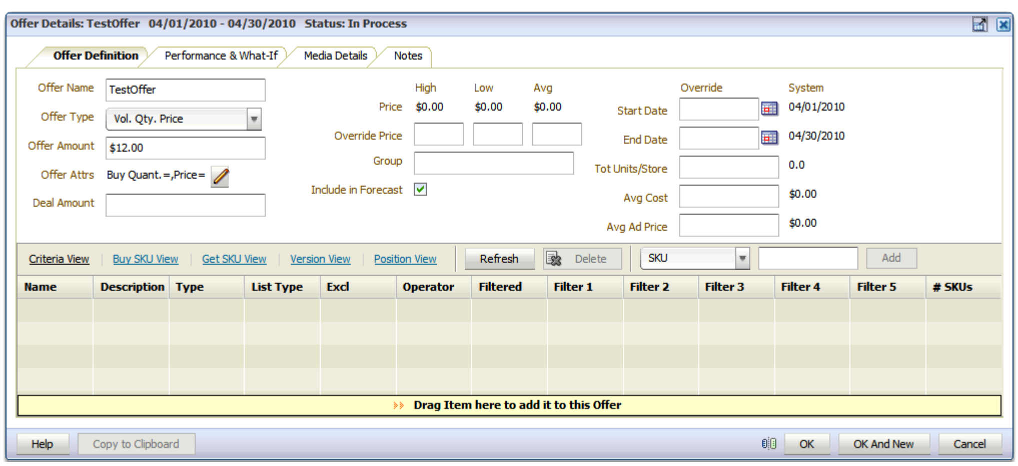
Table 5–4 Confidence Indicator Icons and Icon Definitions

Icon	Definition
	No Confidence in the system forecast.
	High Confidence in the system forecast.
	Medium Confidence in the system forecast.
	Low Confidence in the system forecast.
	Note: For the following icons, the confidence indicator values represent the confidence in the system forecast metrics for the original offer and not the forecast metrics that were generated as a result of a user forecast.
	User (High System Confidence).
	User (Medium System Confidence).
	User (Low System Confidence).
	User (No Confidence).

The Offer Details Window

When an offer is opened from the Offers tab, the Offer Details window opens displaying the properties for that particular offer. It is used to add details to new offers or to view the details of existing ones.

Figure 5–19 Offer Details Window with the Offer Definition Tab Displayed



The Offer Details window consists of 4 tabs as follows:

- Offer Definition—when an offer is initially added or when an existing offer is opened, the Offer Definition tab is displayed by default. This tab displays all properties for an offer. For information about adding an offer, see Adding An Offer on page 5-24.
- Performance & What–If—view forecast data and experiment with what-if scenarios. For more information, see Performance & What-If on page 5-41.

- Media Details—include media details for your offer such as images, headlines, and body copy. For more information, see Media Details on page 5-55.
- Notes—when creating or opening an existing offer, use the Notes tab of the Offer Details window to enter notes about the offer, the importance of the offer or note, and to update offer status (e.g. In Process, Submitted, Approved, or Denied). For more information about entering notes, see Adding Notes to a New Offer on page 5-58.

The Offer Definition tab of the Offer Details window displays the properties of a single offer. See Table 5–5, " Offer Details Window—Offer Definition Tab—Offer Details" for more information.

Table 5–5 Offer Details Window—Offer Definition Tab—Offer Details

Field	Description
Offer Name	Name of the Offer.
Offer Type	Type of Offer (% Off, Dollar off, etc.).
Offer Amount	Discount applied based on offer type.
Offer Attrs	Offer attributes associated with the offer type. Hover over the field to view a full description of all the associated attributes and their values. **Note:** Offer attributes are associated to the offer type. In case you choose a different offer type, the offer amount and attributes may change. By default, the offer attributes field display the default values. Offer Attrs field only appears for offer types that use it.
Deal Amount	If a vendor deal has been defined for your offer, enter the deal amount here. (confirm this)
Price	Price of the Offer Item. High and Low prices represent the highest and lowest price of the SKU's available for the offer.
Override Price	To override the price, enter new values for High, Low, and/or Avg price.
Group	The name of the group that the offer is assigned to.
Include in Forecast	If selected, offer will be included in forecast. If it is not selected, offer will not be included in forecast calculations.
Override Tot Units/Store	Average Total Units per Store.
Override Avg Cost	Average cost of the items in the offer.
Override Avg Ad Price	Average ad price.
Override Start Date	Start date for the offer. The start date defaults to the promotion start date. Use this field to override the value with a specific date for the offer.
Override End Date	End date for the offer. The end date defaults to the promotion end date. Use this field to override the value with a specific date for the offer.
Name	Name of the merchandise.
Description	Brief Description of the offer.
Type	Offer Type.
List Type	Standard offers will have Buy assigned for this option. Buy One Get One offers use this feature to define whether items are part of the Buy or Get list.

Table 5–5 (Cont.) Offer Details Window—Offer Definition Tab—Offer Details

Field	Description
Excl	If checked, all items that meet filter criteria have been excluded.
Operator	Identify which operator was used when filtering a list of items. When no filtering is applied, this field defaults to "or" for SKUs and "and" for categories.
Filtered	If checked, at least one of the following criteria has been defined: Item Price, Item Cost, Supplier ID, Purchase Type or Group Indicator.
Filter 1	If filtered, show filter options for the first filter.
Filter 2	If more than one filter, show the filter options for filter 2.
Filter 3	If more than one filter, show the filter options for filter 3.
Filter 4	If more than one filter, show the filter options for filter 4.
Filter 5	If more than one filter, show the filter options for filter 5.
#SKU's	Number of SKUs associated with the offer.
Quick Entry List	Using this text box, enter id's for SKUs, classes, departments, divisions, companies, chains or SKU lists to add to the offer.

Filters

Use any of the following filters to change your view of the Offer Details window:

- Criteria View—view the offer according to its specified criteria.
- Buy SKU View—For offers of the buy one get one type, list SKUs associated with the "buy" list.
- Get SKU View—for offers of the buy one get one type, list SKUs associated with the "get" list.
- Version View—if multiple locations or store set have been defined for your promotion, view the offer versions.
- Position View—if multiple positions have been defined for your offer, view all the positions relevant to the offer.

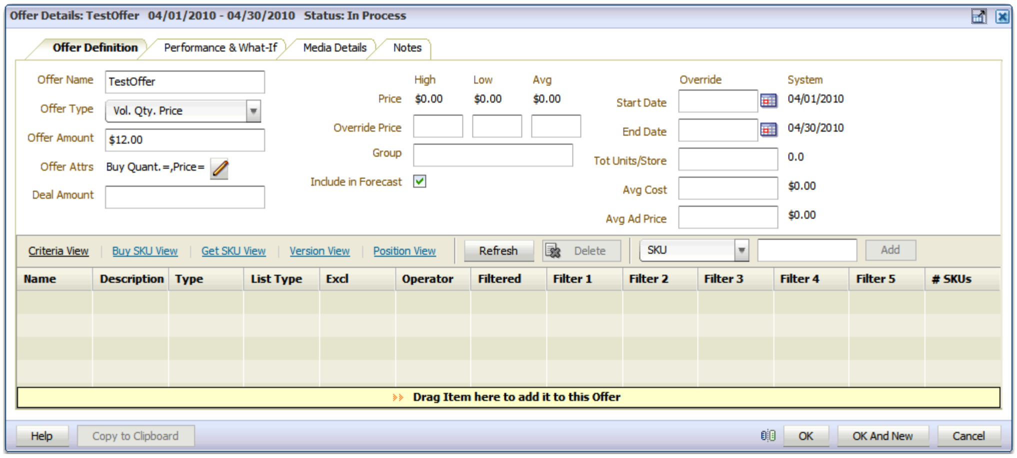
Adding An Offer

On the Offers tab, click the Add button to create a new offer.

To add an offer to a promotion:

1. From the Offers tab of the Promotion Manager, click the Add button, and then click **Add New** from the drop-down menu.
2. The Offer Details window opens.

Figure 5–20 Offer Details Window—Adding an Offer



3. **Offer Name**—enter a name for the offer.

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

4. **Offer Type**—select the type of offer. Your offer types may vary. The following are the basic offer types supported by Promotion Planning and Optimization:
   - $Off—a specific monetary amount off the items on the offer.
   - % Off—a specific percentage off the price of the items on the offer.
   - Discount Price—a specific price for an item on the offer.
   - Everyday Low Price—the regular low price of an item on the offer.
   - Buy One...—an additional item or discount off an additional item with the purchase of one or more items.
   - Free Gift with Purchase—a gift for purchasing an item.
   - Instant Rebate—a monetary amount given back for purchase of an item.
5. **Offer Amount**—enter or select the amount or percentage off.
6. **Offer Attrs**—select the offer attributes associated with the offer type.

   > **Note:** Offer attributes are associated to the offer type. In case you choose a different offer type, the offer amount and attributes may change. By default, the offer attributes field display the default values. Offer Attrs field only appears for offer types that use it.

   You can hover over the field to view a full description of all the associated attributes and their values. To select or edit the offer attributes:

   a. Click the **Edit** (Pencil) icon next to the **Offer Attrs** field. The **Attributes** window appears.

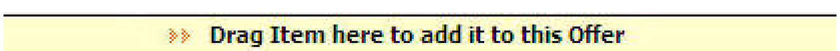
   b. Update the associated attributes information, and click **OK**.
7. (Optional) **Deal Amount**—enter a vendor deal amount, if applicable.

8. (Optional) Override the system calculated High Price, Low Price, Avg Price, Start Date, End Date, Tot Units/Store, Avg Cost, and Avg Ad Price. The application will autofill these fields by selecting the highest and lowest Item Price value from all the (non–excluded) SKUs in the offer.
9. (Optional) **Group**—enter the group to which the offer belongs.
10. (Optional) Select the "Include in Forecast" checkbox to include the offer in the promotion forecast.
11. Using the Vertical Tab, select **Hierarchies**. Select one of the following:
    - Assigned Categories—add items to your offer from categories that have already been assigned to the promotion. You may only use this option if you have previously assigned categories to your promotion within the Categories tab of the Promotion Manager.
    - SKU or SKU List—select a distinct SKU or an entire SKU List from the Merchandise Hierarchy. The SKU Detail or SKU List Detail popup will open asking you to include or exclude SKU(s). Use the Refresh button to refresh the SKUs included in your offer.
      – To add individual SKUs to your offer, use the SKU quick entry field within the Offer Details window.

Figure 5–21 SKU Quick Entry Feature

      – Enter a SKU number.
      – Click **Add**. Repeat as desired until all individual SKUs are added to the offer.
    - Merchandise Hierarchy—use the Search option with the Merchandise Hierarchy to locate items to include in your offer.
12. Drag your selected items from the Hierarchies Selector and drop them onto the bar labeled "Drag Item here to add it to this Offer" located at the bottom of the table. Your items are now added to the offer.

Figure 5–22 Drag Item to Offer Bar



13. The Category or SKU List Details window opens.
    - **Level**—select "Include Category" to include the SKU category or select "Exclude Category" to exclude the SKU category.
    - **List Type**—select Buy. The Get option is used within the Buy One Get One Offer Type. See Creating a Buy One Get One (BOGO) Offer on page 5-29 for more information.
    - **Filter By**—select "And" or "Or" and then choose from Item Cost, Item Price, Supplier ID, Purchase Type, or Group Indicator as additional filter options. You will be able to enter specific values for each filter definition.
    - Click **OK**.
14. To save your offer:

- Click **OK and New** to save your offer and create a new offer.
- Click **OK** to save your offer and close the Offer Definition window.

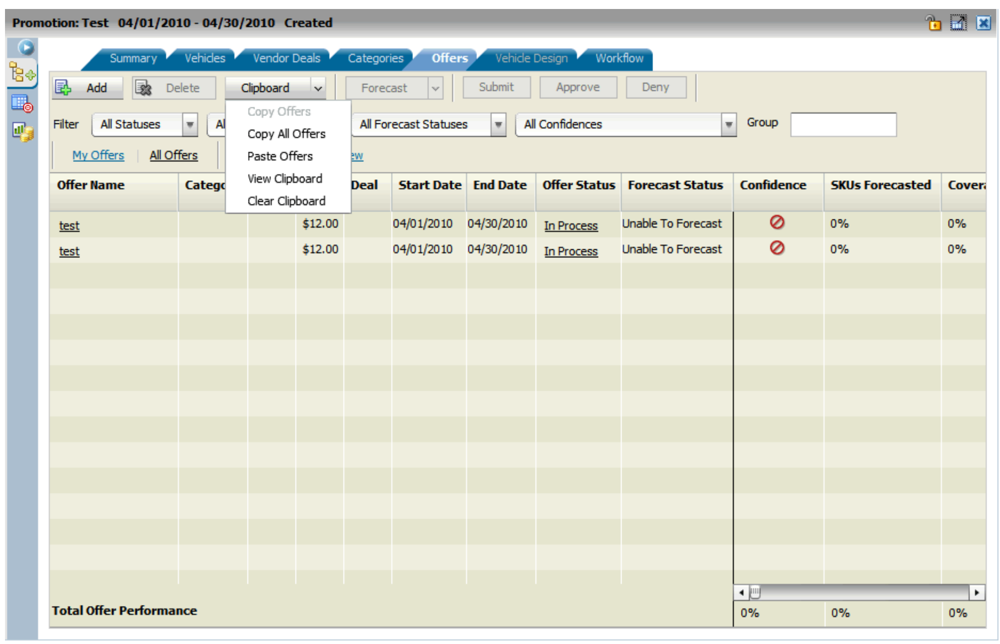
15. Offer Forecast. After you have finished creating your offer, you have the option of running the forecast from the Offers tab of the Promotion Manager. For more information about forecasting an offer, see Forecasting Offers on page 5-50.
16. Offer Status. After an offer is created, its status is changed to "In Process". For more information about submitting an offer for approval, see Submitting, Approving, and Rejecting Offers on page 5-36.

Copying Offers

The Copy Offers feature enables you to copy existing offers to the promotions you want. When copied, the offers are first placed in a clipboard. You can access this clipboard from the promotion you want, and then paste the copied offer.

Note: Offers copied and placed in the clipboard are specific to the sytem and not based on your user account.

Figure 5–23 Clipboard Drop-down Menu on the Offers Tab



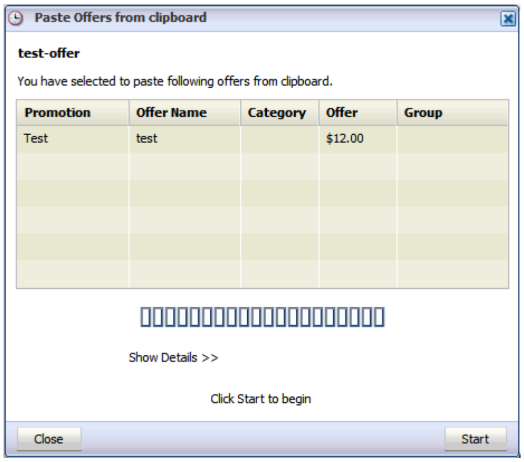
To copy an offer:

1. On the **Offers** tab, select the offer or offers you want to copy, and click the **Copy Offers** option from the **Clipboard** drop-down menu. The offer gets copied to a clipboard. You can now paste this offer in any promotion you want.

   You can also choose to copy all offers by clicking the **Copy All Offers** option from the **Clipboard** drop-down menu. Once copied, you can use the Clipboard to view the copied offers and select specific ones you want to paste in the new promotion. For more information on the clipboard, see Offer Clipboard Screen
2. Open the promotion where you want to paste the copied offer.
3. Once the desired promotion appears, click the **Offers** tab.

4. On the **Offers** tab, click the **Paste Offers** option from the **Clipboard** drop-down menu. The **Paste Offers from clipboard** window appears.

Figure 5–24 Paste Offers from clipboard Window



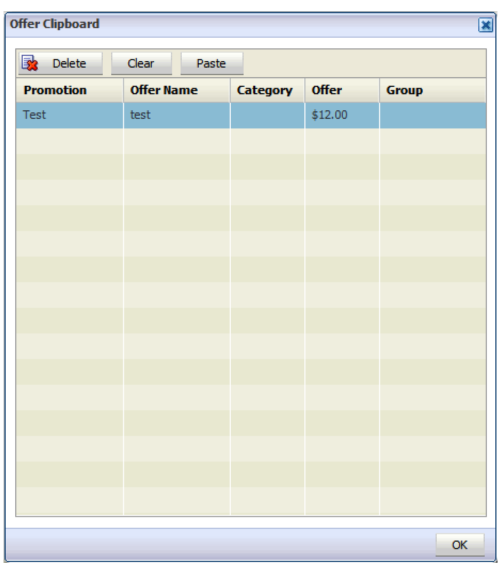
5. In the **Paste Offers from clipboard** window, review the offers you want to paste, and then click **Start**.
6. Once the desired offer appears in the list, click **Close**.

Offer Clipboard Screen

The Offer Clipboard screen enables you to view the copied offers available in the clipboard. It also enables you to delete copied offers that are no longer needed in the clipboard or select specific offers that you want to paste.

You can access the **Offer Clipboard** screen by clicking the **View Clipboard** option from the **Clipboard** drop-down menu on the **Offers** tab.

Figure 5–25 Offer Clipboard Screen



Note: To clear the contents of the clipboard, you can use the **Clear Clipboard** option from the **Clipboard** drop-down menu.

Creating a Buy One Get One (BOGO) Offer

Note: This option is available only if it is configured for your version of Promote.

The Buy One Get One (BOGO) offer type allows you to create an offer where a consumer buys one item and gets another item free or at a reduced price. BOGO items can be from Categories or SKU lists. A BOGO offer can include items from the same category or SKU list.

Creating BOGO's Using Categories of Items

Complete the following steps to create a BOGO offer that uses a Category of items.

1. From the Offers tab of the Promotion Manager, select **Add**.
2. The Offer Details window opens.
3. **Offer Name—**enter a name for the offer.

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

4. **Offer Type—**select one of the BOGO offer types from the list. Depending on your implementation of Promotion Planning and Optimization, you may have some or all of the following BOGO types:
   - Buy One Get One %Off—Buy One item and get another item at a certain %off. Define the percentage value in Step 5 below.
   - Buy 2—Buy 2 items and get another at a defined price. The price will be defined in Step 5 below.
   - Buy 1—Buy 1 item and get another at a defined price. The price will be defined in Step 5 below.
5. **Offer Amount—**enter or the amount or percentage off.
6. **Offer Attrs—**select the offer attributes associated with the offer type.

   Note: Offer attributes are associated to the offer type. In case you choose a different offer type, the offer amount and attributes may change. By default, the offer attributes field display the default values. Offer Attrs field only appears for offer types that use it.

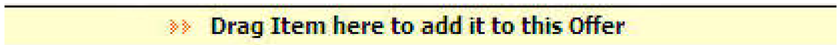
   You can hover over the field to view a full description of all the associated attributes and their values. To select or edit the offer attributes:

   a. Click the **Edit** (Pencil) icon next to the **Offer Attrs** field. The **Attributes** window appears.

b. Update the associated attributes information, and click **OK**.

7. Define items for the "Buy" list. Using the Hierarchies Selector, select **Merchandise Hierarchy**, and then select a Category.
8. Drag your selected Category from the Merchandise Selector, and drop it onto the bar labeled "Drag Item here to add it to this Offer" located at the bottom of the screen.

Figure 5–26 Drag Item to Offer Bar



9. The Category Details popup opens.
   - **List Type**—select **Buy**.
   - **Filter By**—enter values for the filter criteria.
   - Click **Ok**.
10. Create the "Get" list. Select a Category from the Merchandise Selector.

> **Note:** You have the option of creating the "Get" list using the same Category you specified in the "Buy" list.

11. Drag the selected Category to the "Drag Item here to add it to this Offer" bar located at the bottom of the screen.
12. The Category Details popup opens.
    - **List Type**—select **Get**.
    - **Filter By**—enter values for the filter criteria.
    - Click **Ok**.
13. To save your offer:
    - Click **OK and New** to save your offer and create additional offers.
    - Click **OK** to save your offer and close the Offer Definition window.
14. Offer Forecast. After you have finished creating your offer, you have the option of running the forecast for it from the Offers tab of the Promotion Manager. For more information about forecasting an offer, see Forecasting Offers on page 5-50.
15. Offer Status. After an offer is created, its status is changed to "In Process". For more information about submitting an offer for approval, see Submitting, Approving, and Rejecting Offers on page 5-36.

Creating BOGO's Using SKU Lists

Complete the following steps to create a BOGO offer that uses SKU Lists.

1. From the Offers tab of the Promotion Manager, select **Add**.
2. The Offer Details window opens.
3. **Offer Name**—enter a name for the offer.

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

4. **Offer Type—**select one of the BOGO offer types from the list. Depending on your implementation of Promotion Planning and Optimization, you may have some or all of the following BOGO types:
   - Buy One Get One %Off—Buy One item and get another item at a certain % off. Define the percentage value in Step 5 below.
   - Buy 2—Buy 2 items and get another at a defined price. The price will be defined in Step 5 below.
   - Buy 1—Buy 1 item and get another at a defined price. The price will be defined in Step 5 below.
5. **Offer Attrs—**select the offer attributes associated with the offer type.

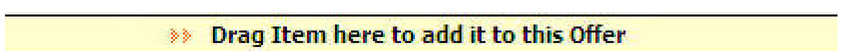
   Note: Offer attributes are associated to the offer type. In case you choose a different offer type, the offer amount and attributes may change. By default, the offer attributes field display the default values. Offer Attrs field only appears for offer types that use it.

   You can hover over the field to view a full description of all the associated attributes and their values. To select or edit the offer attributes:

   a. Click the **Edit** (Pencil) icon next to the **Offer Attrs** field. The **Attributes** window appears.

   b. Update the associated attributes information, and click **OK**.
6. **Offer Amount—**enter the amount or percentage off.
7. Define items for the "Buy" list. Using the Hierarchies Selector, select **SKU Lists**, and then select a list.
8. Drag your selected SKU List from the Merchandise Hierarchy and drop it onto the bar labeled "Drag Item here to add it to this Offer" located at the bottom of the screen.

Figure 5–27 Drag Item to Offer Bar



9. The SKU List Details popup opens.
   - **List Type—**select **Buy**.
   - Click **Ok**.
10. Create the "Get" list. Select another SKU List from the Merchandise Hierarchy.

    Note: You have the option of creating the "Get" list using the same SKU List you specified in the "Buy" list.

11. Drag the selected SKU List to the "Drag Item here to add it to this Offer" bar located at the bottom of the table.

12. The SKU List Details popup opens.
    - **List Type—**select **Get**.
    - Click **Ok**.
13. To save your offer:
    - Click **OK and New** to save your offer and create additional offers.
    - Click **OK** to save your offer and close the Offer Definition window.
14. Offer Forecast. After you have finished creating your offer, you have the option of running the forecast for it from the Offers tab of the Promotion Manager. For more information about forecasting an offer, see Forecasting Offers on page 5-50.
15. Offer Status. After an offer is created, its status is changed to "In Process". For more information about submitting an offer for approval, see Submitting, Approving, and Rejecting Offers on page 5-36.

Editing an Existing Offer

To edit an existing offer:

1. Open a promotion from the calendar or navigator.
2. From the Promotion Manager, select the Offers tab.
3. From the Offer Name column, select the link to the offer you want to open.

> **Note:** For the offer you want to open, make note of its status as denoted in the Offer Status column. Any edits to a "Submitted", "Approved" or "Denied" offer that invalidate its forecast metrics (e.g. Forecast Status is equal to Unable to Forecast), will return the offer's status back to "In Process".

4. Refer to steps 3 through 13 of Adding An Offer on page 5-24.

Deleting An Offer

To delete an offer, complete the following steps:

1. From the Offers tab of the Promotion Manager, select the row of the offer to delete.
2. Click **Delete**. The Confirm window opens.
3. Click **Yes** to delete the offer.

Working with Offer Version Groups

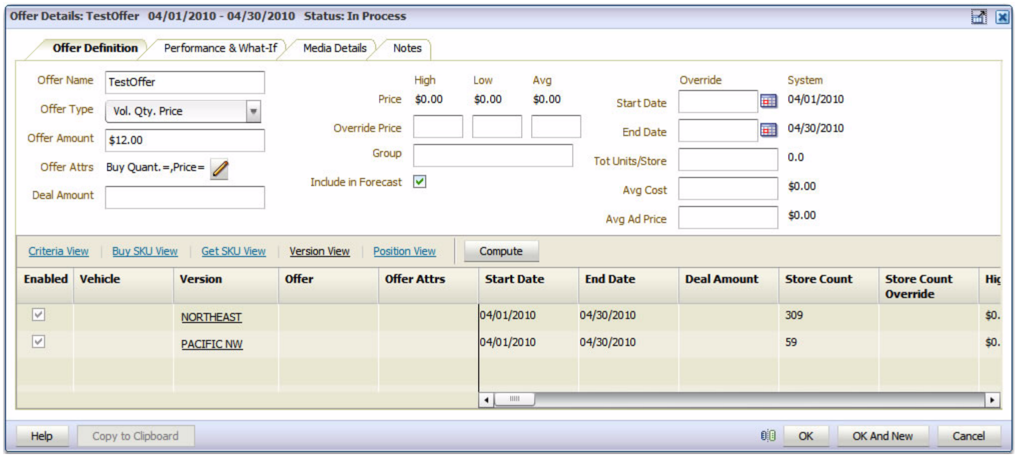
If you have defined multiple version groups for your promotion, all offers created for the promotion are automatically associated with these version groups. If desired, version groups can be excluded from an offer.

Viewing Offer Vehicle Version Groups

To view vehicle version groups of an offer:

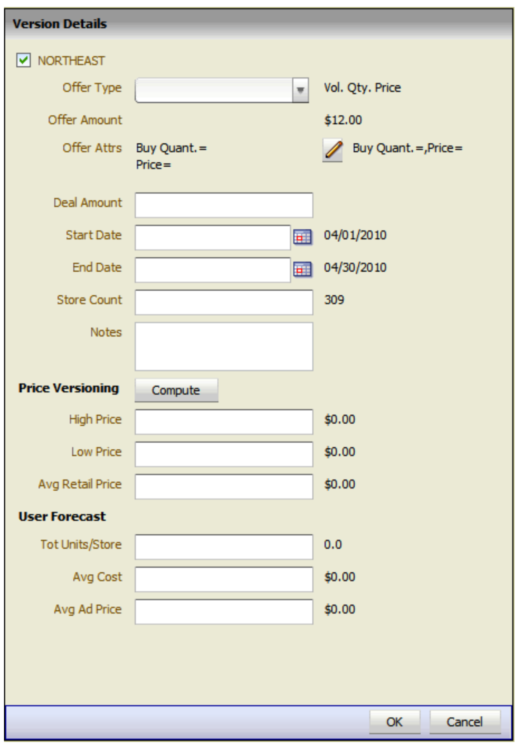
1. From the Offers tab of the Promotion Manager, open an offer.
2. The Offer Details window opens. Select **Version Group View**. The Offer Details window redisplays the offer according to its version groups.

Figure 5–28 Offer Details Window—Version View



3. From the Version column of the Offer Details window, click onto the hyperlinked name of the version group. The Version Group Detail window opens.

Figure 5–29 Version Details Window



The Version Groups Details window contains the following fields:

- A checkbox to enable or disable the version.
- Offer Type. The current offer type is displayed. All visible non-model offer attributes associated with the offer type are also displayed.
- Deal Amount. If a Vendor Deal has been defined for the offer, the amount of the deal is listed.
- Store Count. The store count for the given version can be overridden here.

- Start Date. Start date for the offer. The start date defaults to the promotion start date. Use this field to override the value with a specific date for the offer.
- End Date. End date for the offer. The end date defaults to the promotion end date. Use this field to override the value with a specific date for the offer.
- Notes. Space for providing additional notes about the version.
- Price Versioning. Prices can be adjusted for versions by overriding values for High Price, Low Price, and Avg Retail Price and clicking the Compute button.
- User Forecast. Override values for Tot Units/Store, Avg Cost, and Avg Ad Price.

Including/Excluding an Offer Version

To include or exclude a version of an offer:

> **Note:** An offer version can be included or excluded only for an un-positioned offer. This does not apply for the positioned offers.

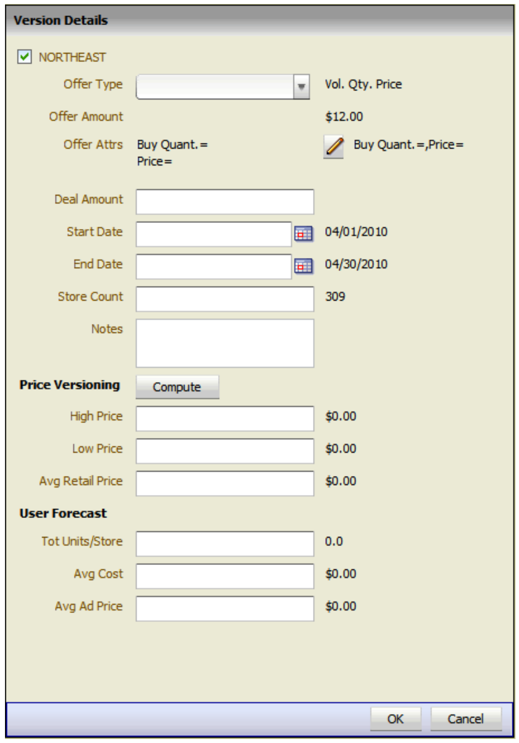
1. Open an offer from the Offers tab of the Promotion Manager. The Offer Details window opens.
2. Select **Version Group View**. The Offer Details window redisplays according to its version groups.
3. From the Version column, select a version group. The Version Group Details window opens.
4. Select the check box next to the Version name to enable it. Deselect the check box to disable it.
5. Click **Ok**.

Modifying an Offer Version Group

To modify a version group of an offer:

1. Open an offer from the Offers tab of the Promotion Manager. The Offer Details window opens.
2. Select **Version Group View**. The Offer Details window redisplays according to its version groups.
3. Select a version group from the list. The Version Group Details window opens.

Figure 5–30 The Version Details Window



4. Modify any of the following options:
   - **Include or Exclude**—select or deselect the checkbox located next to the name of the Version.
   - **Offer Type**—select a new offer type. Associated offer attributes may also appear under this field. You can also choose to change the value for the offer attributes.
   - **Deal Amount**—if a Vendor Deal has been defined, enter the deal amount.
   - **Store Count**—override the store count by entering a new number.
   - **Start Date**—override the value with a specific start date for the offer.
   - **End Date**—override the value with a specific end date for the offer.
   - **High Price**—override the High Price by entering a new price.
   - **Low Price**—override the Low Price by entering a new price.
   - **Avg Retail Price**—override the Avg Retail Price by entering a new price.
   - **Tot Units/Store**—override the Tot Units/Store by entering a new value.
   - **Avg Cost**—override the Avg Cost of an item by entering a new cost.
   - **Avg Ad Price**—override the Avg Ad Price of an item by entering a new price.
5. Click **Ok** to save your changes. Click **Cancel** to discard.

Price Versioning

If your original offer type is $Off, Discount Price, or Price Point, you also have the option of adjusting prices for versions using the Compute button, which is viewable when using Version Group View on the Offer Details window. The compute button is also available at the bottom of the Version Details window.

Computing Prices for a Single Version Group To compute prices for a single version group:

1. Using Version Group View in the Offer Details window, select a version group to open. The Version Group Details window opens.
2. Enter values for any of the following fields:
   - **High Price—**override the High Price by entering a new price.
   - **Low Price—**override the Low Price by entering a new price.
   - **Avg Retail Price—**override the Avg Retail Price by entering a new price.
3. Click **Compute**.
4. Click **Ok** to save changes.

Computing Prices for All Version Groups To compute prices for all version groups:

1. Open and offer. On the Offer Definition Tab, enter values for High, Low or Avg Price.
2. Enter values for any of the following fields:
   - **High Price—**override the High Price by entering a new price.
   - **Low Price—**override the Low Price by entering a new price.
   - **Avg Retail Price—**override the Avg Retail Price by entering a new price.

> **Note:** Depending on your implementation of Promotion Planning and Optimization, you may have additional price options available for edit that are not included here.

3. Click **Compute**. The prices for all version groups of the offer are adjusted based upon the original retail price of the item based on its location and the values entered above.

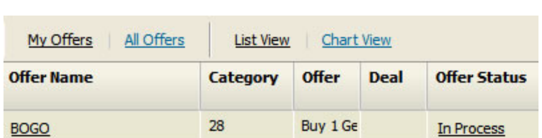
Submitting, Approving, and Rejecting Offers

Newly created offers are given the status "In Process" by default. An offer will remain in this status until it is submitted for approval. Once submitted for approval, an offer is either approved or rejected. If an offer is rejected, the submitter will receive an email notification stating that the offer was rejected.

About Offer Status

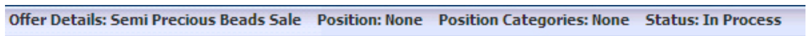
Offer status information is available from the Offers tab of the Promotion Manager and the Offer Details window label when an offer is created or opened.

Figure 5–31 Promotion Manager—Offers Status Column



Offer Status information is also viewable whenever an individual offer is opened as illustrated below:

Figure 5–32 Offer Status Info Viewable from Offer Details Window



Offer Statuses are as follows:

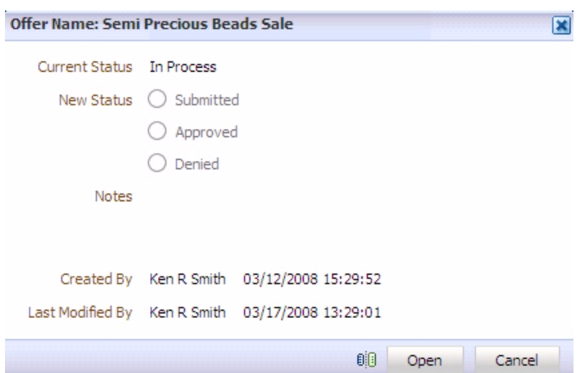
- In Process—the offer is in the process of creation. By default, all newly created offers are given the status of "In Process". In addition, if a user edits information that impact's an offer's forecast and the offer has a status of "Submitted", "Approved" or "Denied", the offer's status will return to "In Process".
- Submitted—the offer has been submitted for approval.
- Approved—the offer has been approved.
- Denied—the offer has been denied.

The Offer Status Window The Offer Status window displays an offer's status.

To access the Offer Status Window:

1. Locate an offer on the Offers Tab.
2. Select the offer status link from the Offer Status column. The Offer Status Window opens as follows:

Figure 5–33 Offer Status Window—Information about an Offer's Status



3. The window will display the current offer's status and display any notes associated with it.
4. If you do not have permissions to submit, approve or deny offers, the window will appear in read only. Otherwise, you may use this window to submit, approve, or deny an offer.

Required Criteria to Submit an Offer

An offer must meet the following requirements in order to qualify for submission:

- Have a status of "In Process".
- Must be associated with a SKU, Category, or a SKU List.
- Must have a High and Low Price (either system generated or user specified).

- Must not have a Forecast Status of "Unable to Forecast", "No Forecast", or "Failed". Offers with a Forecast Status of "Excluded" qualify for submission.

Submitting An Offer

Only users with edit permissions to an offer can submit that offer for approval. After an offer is submitted, its status changes to "Submitted". If a Submitted offer is edited and its forecast status changes to "Unable to Forecast" or "No Forecast", the offer status will change from "Submitted" to "In Process". Offers can be submitted multiple times until the desired submission status (Approved) is received.

Submitting an Offer Directly from the Offers Tab To submit an offer directly from the Offers tab:

1. Select an offer.
2. Click **Submit**.

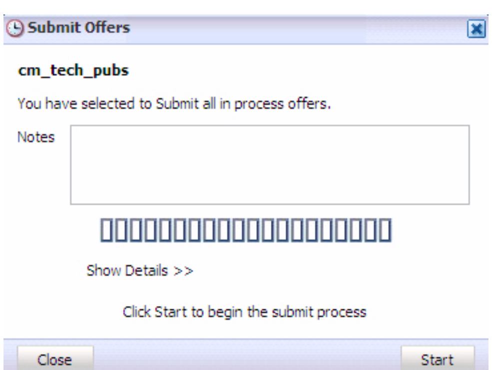
Submitting a Single Offer Using the Offer Status Window To submit an offer using the Offer Status window:

1. From the Offers tab, click onto an offer's offer status link from the Offer Status column.
2. The Offer status window opens. Click **Open**.
3. Select the Submit radio button.
4. Enter notes using the Notes field.
5. Click **OK** to submit the offer. Click **Cancel** to cancel.

Submitting All Offers To submit all offers for a promotion using the Offer Status Window:

1. Select no offers from the Offers tab by clicking the metric summary row at the bottom of the Offers list.
2. Click **Submit**. The Submit Offers window opens. Click **Start** to begin the submission process.

Figure 5–34 Submit All Offers Popup Window



- All "In Process" offers for the promotion are submitted. This includes any offers that have been added to the promotion since the time you accessed the Offers Tab. Offers that are submitted must meet the submission criteria as defined in Required Criteria to Submit an Offer on page 5-37.

3. When finished, the submit offers complete window opens.

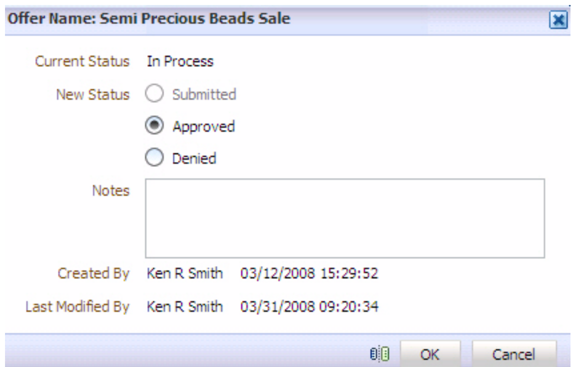
Approving An Offer

If you have appropriate permissions to approve offers, the Approve button on the Offers tab will be enabled. Only submitted offers can be approved.

Approving a Single Offer from the Offers Tab To approve a single offer:

1. Select an offer from the Offers tab.
2. Click **Approve**. The Offer Status window opens.

Figure 5–35 Approve Offer Status Window

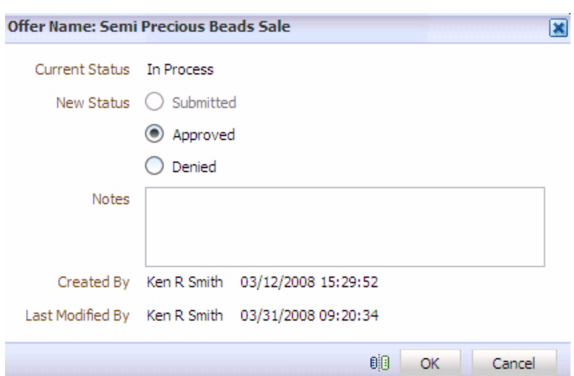


3. Select the **Approve** radio button.
4. Enter notes if desired.
5. Click **OK** to approve the offer. Click **Cancel** to cancel the approval process.

Approving a Single Offer Using the Offer Status Link To approve a single offer using the offer status link:

1. Select the offer status link of the desired offer. The Offer Status Window opens.

Figure 5–36 Approve Offer Status Window



2. Click **Open**.
3. Select the Approve radio button.
4. Enter notes using the **Notes** field.

5. Select **OK** to submit the offer. Click **Cancel** to cancel the approve process.

Approving All Offers To submit all offers:

1. Select no offers from the Offers tab by clicking on the metric summary row at the bottom of the offers list. Click **Approve**.
2. The Approve Offer Status window opens.

Figure 5–37 Approve All Offers Dialog Box

3. Enter notes in the Notes field, if desired.
4. Select the "Include offers with a status of Denied" checkbox to approve all offers with a status of "Denied".
5. Click **Start**. The progress window remains open to display the approval progress.
6. When the approval process has completed, click **Close** to finish.

Rejecting An Offer

If you have appropriate permissions to deny offers, the Deny button will be enabled on the Offers Tab.

Rejecting a Single Offer To reject a single offer:

1. There are two ways to reject a single offer:
   - Select a single offer from the Offers tab, and click **Deny** OR
   - Select the offer status link for the desired offer.
2. The Offer Status window opens.
3. Select the **Deny** radio button.
4. Enter notes if desired.
5. Click **OK** to deny the offer. Click **Cancel** to cancel the rejection process.

Rejecting All Offers To reject all offers:

1. Open the promotion in Single User mode from the Promotion Manager. When the promotion opens, select the Offers Tab. Ensure that no offers are selected on the Offers Tab.
2. Click **Deny**. The Deny Offer window opens.
3. Select the **Deny** radio button.

4. (Optional) Enter notes using the Notes field.
5. Select the "Include all with a status of Approved" checkbox to Deny all offers that have already been approved for the promotion.

> **Note:** When an offer is rejected, the system automatically sends an email to the submitter informing he/she that the offer has been denied. If there is no email associated with the submitter, an email will not be sent.

6. Click **Close** to finish.

Performance & What-If

When an offer is open, use the Performance & What-If tab within the Offer Details window to view forecast data and to experiment with what-if scenarios.

The following options are available:

- What–If—use the What–If feature to create forecast comparisons between your original offer and up to nine what–if scenarios. What–If scenarios can be viewed as columns (Vertical View) or as a list (List View). For more information about What–If, see Performing a What-If Analysis on page 5-45.
- Forecast—use forecasting to recalculate predicted demand and update the performance metrics. For more information, see Forecasting on page 5-49.
- User Forecast—You also have the ability to enter your own values to predict the forecast. For more information, see Creating a User Forecast on page 5-47.
- Affinity Details—use the Affinity feature to help design better promotions and to identify affinity effects such as halo and cannibalization. For more information, see Affinity Details on page 5-49.
- Graph—use the Graph to view the base and potential performance of a promotion. For more information, see Graph on page 5-52.

About the Performance & What-If Screen

The Performance & What-If tab by default displays a single column for the current scenario. This includes your current offer with the attributes listed. You can choose to add up to nine What-If scenarios columns using the Add button.

Although the attributes listed in the What-If scenario columns are identical to those in the current offer, they are not pushed to the what-if scenarios when a change occurs in the current offer.

A new what-if scenario column is a new copy and considered as edited. When you run a forecast, the scenario gets forecasted for the first time. Each scenario is marked *Out of Date* and re-forecasted the next time when you perform any of the following actions:

- Edit the scenario.
- Edit the value index (edits all the scenarios).
- Reset the scenario.

The number and type of scenarios available for experimentation can also be selected using the Setup option. See Setting Up What–If Scenarios on page 5-43 for more information.

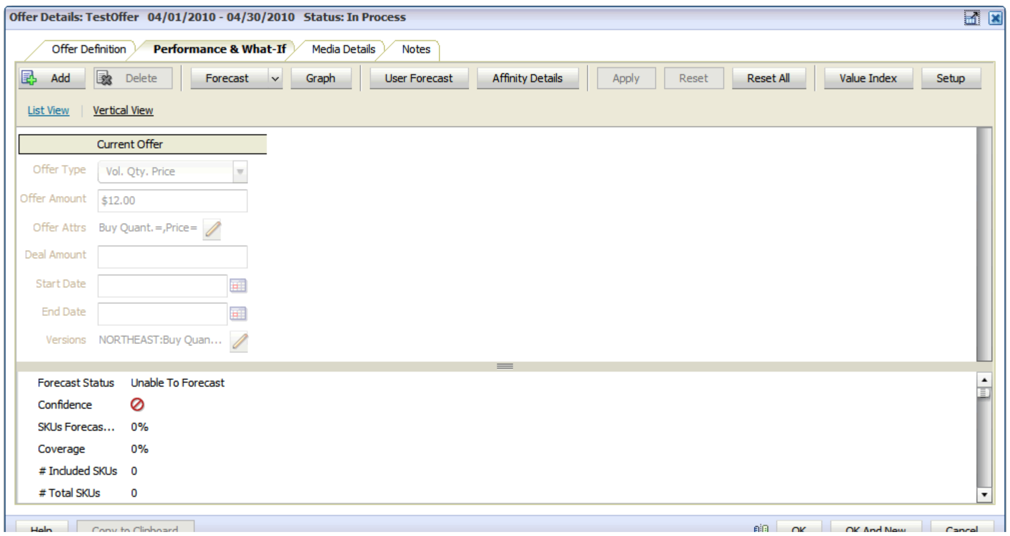
You can also add a system forecast for your offer. You can add this as separate column using the User Forecast button. More details about the use of this column can be found within Creating a User Forecast on page 5-47.

Viewing the Performance and What–If Screen

The Performance and What–If screen has two options for viewing scenarios as follows:

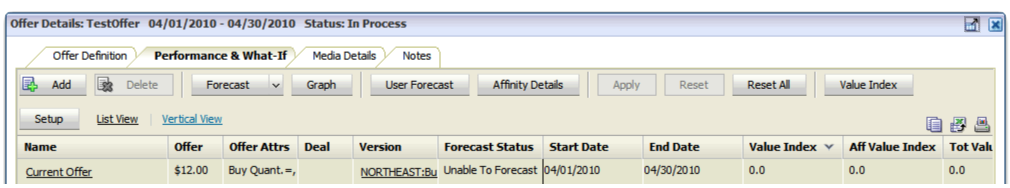
- Vertical View—view your What–If scenarios as side–by–side columns.

Figure 5–38 Performance and What–If Vertical View



- List View—view your What–If scenarios as a list of scenarios.

Figure 5–39 Performance and What–If List View



Copy, Print, and Export Options in the List View Toolbar Along with the other options that appear in the Vertical and List Views, the List View also includes the following options on the right-side of the toolbar:

Option Icon	Option Name	Description
	Copy	Click this option to copy the contents of the list to the clipboard of the operating system in a format that can later be pasted into a Microsoft Excel file.
	Export	Click this option to export the table in a comma separated value (csv) format. When you click this option, an Export dialog box appears. This dialog box will enable you to export the file and save it to a relevant location.
	Print	Click this option to print the table displayed on screen. When the you click this option, a Print dialog box appears. In the printed page, the table will have only simple line borders without any background colors. The column widths will be identical to those on screen. So if a column is not wide enough to see all the text on screen, it will also be cut off in the printed page. It will print across and down as many sheets as necessary depending on the printer configuration and paper size. Since the tables tend to be wide but not have a lot of rows, it is recommended that you change the printer settings to the landscape layout.

Note: The Copy, Export, and Print options on the List View can be enabled or disabled using the following parameters in the *promote.properties* configuration file:

- *list.buttons.copy*
- *list.buttons.export*
- *list.buttons.print*

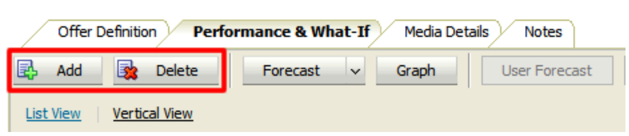
For more information, refer to the *Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Configuration Guide*.

Setting Up What–If Scenarios

Although the Performance & What-If tab displays two what-if scenario columns along with the current user forecast, you can choose to have up to 9 such columns.

To add more what-if scenario columns, click the **Add** button. A new what-if scenario column is added.

Figure 5–40 Add and Delete Buttons on the Performance & What-If Tab

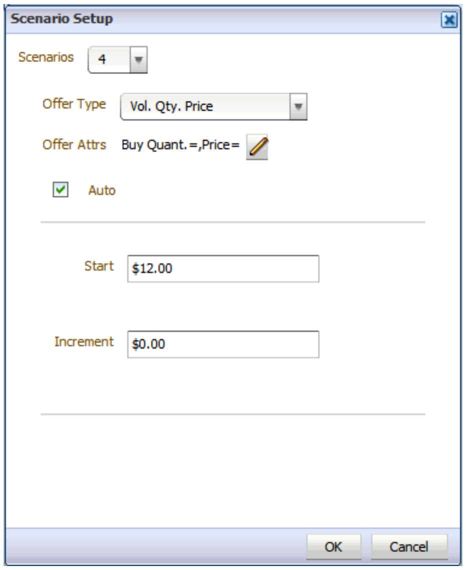


Click the **Delete** button to delete the what-if scenario columns.

Use the Setup option to control the behavior of the What–If scenarios displayed on the Performance and What–If tab. To use the Setup option, complete the following steps:

1. From the top of the Performance and What–If tab, click **Setup**. The Setup window opens.

Figure 5–41 The Scenario Setup Window



2. **Scenarios**—select the number of scenarios you wish to experiment with (up to 9).
3. **Offer Type**—select an offer type.
4. Based on the offer type you select, associated offer attributes may also appear.

> **Note:** By default, the Auto check box is always selected.

5. **Offer Amount**—select an individual offer amount for each scenario included.

> **Note:** If a non–numeric offer type is selected, the option to automatically increment offer types is disabled.

6. Click **Ok**. The number of what–if scenarios you added now appear on the Performance and What–If tab including the specified offer type values.

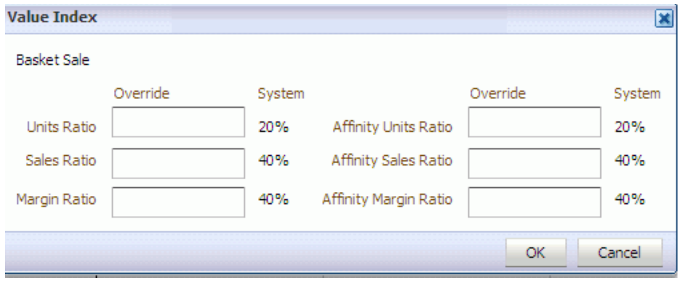
Using the Value Index to Optimize Offers

The value index, which is a weighted average of incremental units, sales, and margin, represents the overall value of a potential offer. Although the value index is defined at the system level, it can be overridden within the Performance and What–If screen and used to evaluate potential offers. For more information regarding the value index, see your System Administrator or refer to the *Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Configuration Guide*.

To override the Value Index, complete the following steps:

1. From the Performance and What–If tab, click **Value Index**. The Value Index window opens:

Figure 5–42 The Value Index Window

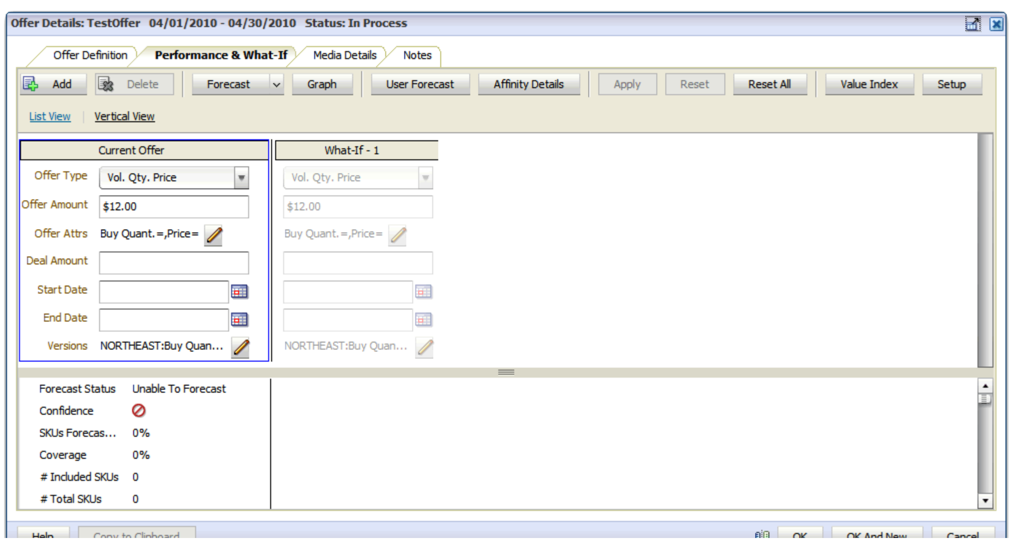


2. Enter new percentages for any of the following values:
   – Units Ratio
   – Sales Ratio
   – Margin Ratio
   – Affinity Units Ratio
   – Affinity Sales Ratio
   – Affinity Margin Ratio
3. Click **Ok** to return to the Performance and What–If tab.

Performing a What-If Analysis

Use the What-If feature to create forecast comparisons between up to 9 what-if scenarios and your original offer.

Figure 5–43 The Performance and What–If Window



1. From the Offer Details window, select the Performance & What-If tab.
2. Use the Setup option to choose the desired number of what–if scenarios and define offers. See Setting Up What–If Scenarios on page 5-43.
3. If desired, create a user forecast. See Creating a User Forecast on page 5-47.
4. Modify the properties of the generated What–If scenarios. Using either Vertical View or List View, select a scenario and modify the following option:

- Enable or Disable Version Groups.
  - Using Vertical View, click the pencil icon from the Versions field of the desired What–If column. Alternatively, using List View, select the hyperlinked name of the version.

    The Modify Version Groups window opens with the following panels:

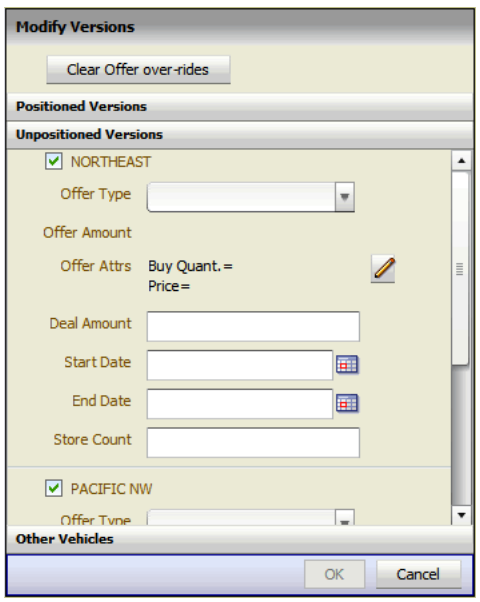
    - Positioned Versions

    - Unpositioned Versions

    - Other Vehicles

Note: The Modify Version Groups window for the What-if scenarios also include a **Clear Offer over-rides** button. Click this button to clear the Offer Type, Offer Amount, and Deal Amount fields for all versions for the specific What-if scenario.

Figure 5–44 The Modify Versions Window



  - Select the check box to enable a version or deselect the checkbox to disable a version.
  - Click **Ok** to save.

5. (Optional) Modify the Value Index. After setting up your what–if scenarios. entering a user forecast, modifying vehicles, and enabling/disabling offers, you can also modify the Value Index. See Using the Value Index to Optimize Offers on page 5-44.
6. Click **Forecast** to update the metrics for the what-if scenarios.
   - If you have used the Value Index option, view your What–If scenarios using the List View option. Using the Value Index column, sort the values to determine the best offer.
7. After viewing the forecast metrics,

- If one of the What-If scenarios meets your requirements, click once onto the scenario, and select **Apply**. Your original offer will be updated with the attribute values from the What-If scenario you selected.
- If none of the What-If scenarios meet your requirements, click **Reset** to reset the attribute values back to the original offer values. Repeat steps 2 through 6 if desired.

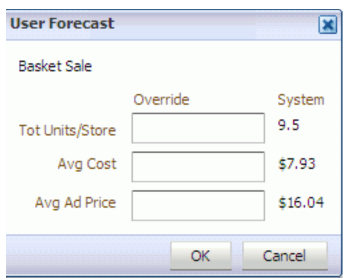
Creating a User Forecast

Use this feature to enter your own forecast predictions for the Tot Units/Store, Avg Item Cost, and Avg Ad Price metrics.

To create a user forecast at the offer level:

1. From the Offers tab, open an offer.
2. Select the Performance & What–If tab.
3. Click **User Forecast**. The User Forecast window opens as follows:

Figure 5–45 Create User Forecast Pop–Up Window



- Tot Units/Store—enter a prediction for average units per store.
- Avg Item Cost—enter an average item cost for the offer if you know of changes in future SKU costs that are not reflected in the system.
- Avg Ad Price—enter the average ad price for the offer if you know of changes in future SKU prices that are not reflected in the system.

4. Click **OK** to generate a forecast based on the values you just entered for the User Forecast. After the forecast is generated, the new, user forecast values are visible within the Current Offer column. The System column retains the original system forecast.
5. The System column's offer metrics display either up or down arrows to indicate whether they are higher or lower than the Current Offer metrics.
6. To save:
   - Click **Ok** to save the Current Offer and System metrics. The Current Offer metrics become the current forecast metrics for the offer.
   - Click **Ok and New** to save the Current Offer and System metrics as noted above and to create a new offer.
7. To discard your changes, click **Cancel**.

Removing a User Forecast

> **Note:** You may only remove a User Forecast if you have permissions to edit the offer. The delete button will be enabled if you have appropriate permissions.

After creating a user forecast and saving the metrics generated for that forecast, you may wish to remove the user forecast and return to the original system forecast.

To remove a user forecast:

1. From the Offer tab, open the offer that contains the user forecast.
2. On the Offer Details window, select the Performance & What–If tab.
3. On the Performance & What-If tab, click **User Forecast**. The User Forecast window appears.
4. On the User Forecast window, clear the values in all the fields, and click **OK**.

Performing What–If Analysis with Offer Versions

If you have versions enabled for your promotion, you can work with these versions within the Performance and What–If tab.

Enabling/Disabling Versions While performing a what–if analysis, you may wish to include some or all versions. To enable or disable a version, do the following:

> **Note:** If you have previously disabled a version from the Offer Definition tab, it will be disabled when the Performance & What–If tab is opened.

1. From the Performance & What–if tab, select a column.
2. Click the Versions icon (pencil). The Modify Versions window opens.
3. Do one of the following:
   - Disable a Version—deselect the checkbox located next to the name of the version. Repeat this step for every version you wish to disable.
   - Enable a Version—if a version had been disabled previously (e.g. from the Offer Definition tab), select the checkbox located next to the name of the version to re–enable it.
4. Click **OK**.

Modifying Version Group Properties To modify the properties of a version:

1. From the Performance & What–If tab, select a column.
2. Click the Versions icon (pencil). The Modify Version Groups window opens.
3. Locate the version you wish to modify. Enter values in the following fields:
   - **Offer Type**—select a new offer type from the drop down list.
   - **Deal Amount**—enter a new deal amount.
   - **Offer Amount**—select a new offer type from the drop down list.

- **Start Date**—Start date for the offer. The start date defaults to the promotion start date. Use this field to override the value with a specific date for the offer.
- **End Date**—End date for the offer. The end date defaults to the promotion end date. Use this field to override the value with a specific date for the offer.

4. Click **Ok**.

> **Note:** Version group modifications are not directly viewable from the Performance & What–If screen. If a version group has been modified, the pencil icon is marked with an "x" indicating that a version group has been modified.

Affinity Details

Use the Affinity feature to help design better promotions and to identify the following affinity effects:

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

To view affinity details for an item:

1. From the Performance & What-If tab, select the current offer.

> **Note:** Affinity details are not available for the what-if scenarios.

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

Figure 5–46 Offer Affinity Window

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

Forecasting

Use forecasting to update the performance metrics for promotions. Performance metrics help you make promotion decisions.

About Forecasting

Forecast metric values can be viewed from the following locations in Promotion Planning and Optimization:

- The Offers tab of the Promotion Manager.

- The Categories tab of the Promotion Manager.
- The Performance & What-If tab within the Offer Details window.
- The Promotion Performance window of the Vertical Tab.
- The Vehicle Design tab of the Promotion Manager—using Layout View for All Pages, hover your mouse over an individual page. A pop up opens displaying forecast information.
- Position Detail Window—open a position on a page within the Vehicle Design tab to view the Position Detail Window.

The ability to forecast items is available from the following locations:

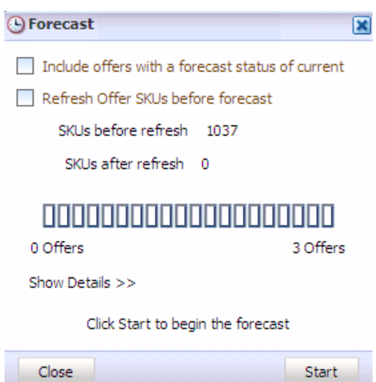
- The Offers tab of the Promotion Manager.
- The Performance & What–If tab within the Offer Details window.

Forecasting Offers

To forecast all offers or an individual offer, complete the following steps:

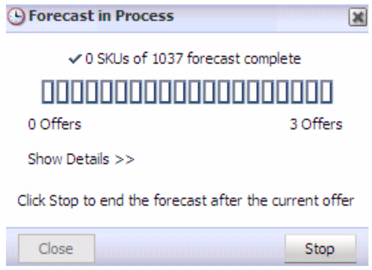
1. Open the Offers Tab of the Promotion Manager.
   - To forecast a single offer, click once onto the desired offer to highlight its row.
   - To forecast all offers for the promotion, select no offers such that no rows are highlighted.
2. Click **Forecast**. Select one of the following options:
   - Start Now—start the forecast. If you select this option, skip to step 3.
   - Advanced Options—start the forecast but specify additional options.

Figure 5–47 Forecast Advanced Options



   – Include offers with a forecast status of current—select the checkbox to forecast only offers that have a forecast status or current.
   – Refresh Offer SKUs before forecast—select the checkbox to refresh all SKUs within the offer before forecasting.
   – Click **Start** to begin the forecast.
3. The Forecast in Process window opens.

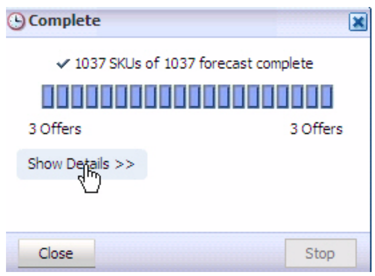
Figure 5–48 Forecast in Process Window



- (optional) Click Stop to stop the forecast after the current offer.

4. After the forecast is complete, you have the option of viewing SKU Details. Select **Show Details** to view the details.

Figure 5–49 Forecast Complete Window with Show Details Option



Forecast Statuses

After completing a forecast for an individual offer or all offers, the offer's forecast status will update to one of the following:

- No Forecast—a forecast has never been run.
- Current—a forecast has run successfully.
- Partial, Unacceptable—used when the forecasted ratio is less than the configured threshold. See your system administrator for more information.
- Partial, Acceptable—displayed when the forecast ratio is greater than the configured threshold. See your system administrator for more information.
- Unable, No Baseline—a forecast cannot be run because the SKU's in the offer have no predict baseline. Open the SKU View to identify the problem SKUs.
- Unable, No Model—a forecast cannot be run because the SKU's in the offer have no model. Open the SKU View to identify the problem SKUs.
- Out of Date—a forecast is out of date because the offer changed.
- Failed, No Prediction—the forecast ran successfully but did not return a prediction.
- Failed, System Error— a forecast could not be run due to an error in the system. See your system administrator for assistance.
- Failed—a forecast request failed because the request could not be completed. Open the SKU View to identify the problem SKUs.
- Expired—a forecast status that only applies to offers that are updated via the pre–planned offer feed and the forecast task has not been re–run.

- Excluded—the "Include in Forecast" option is unchecked on the Offer Definition tab.
- No Baseline—no prediction baseline is available. Possible reasons: the promotion end date falls before the merchandise first predictable date or that the promotion begin date falls after the merchandise last predictable date.
- No Model—no model is assigned to the merchandise contained within the offer.
- No Prediction—a forecast was successfully run but a prediction failed to return.
- Error—a forecast request could not be completed.

Note: For User Entered Forecasts, the possible forecast statuses are as follows: Excluded, Unable to Forecast, and Current. For more information about the User Entered Forecast feature, see Creating a User Forecast on page 5-47.

Graph

Use graphs to view the past and potential performance of a promotion. You can view graphs from the following areas:

- The Offers tab within the Promotion Manager.
- The Categories tab within the Promotion Manager.
- The Performance & What–If tab of the Offer Details window.
- The Promotion Performance window of the Vertical Tab.
- The Vehicle Design tab of the Promotion Manager.
- The Offers tab of the Position Details window within the Vehicle Design tab.

Graph Types

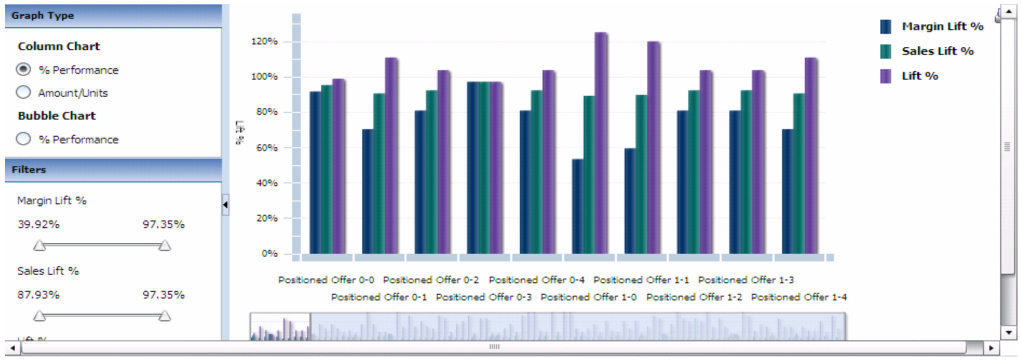
There are two graph types within Promotion Planning and Optimization: Column Chart and Bubble Chart. Offers are displayed according to their page and position location. Information about each chart type is available in the sections that follow.

Column Chart—%Performance

The %Performance Column Chart displays Margin Lift%, Sales Lift%, and Lift%. The x–axis displays the Offer, and the y–axis displays the Lift%.

A menu is located along the left side of the chart allowing you to filter the appearance of the graph according to the metrics for Margin Lift%, Sales Lift%, and Lift%.

Figure 5–50 Column Chart—%Performance

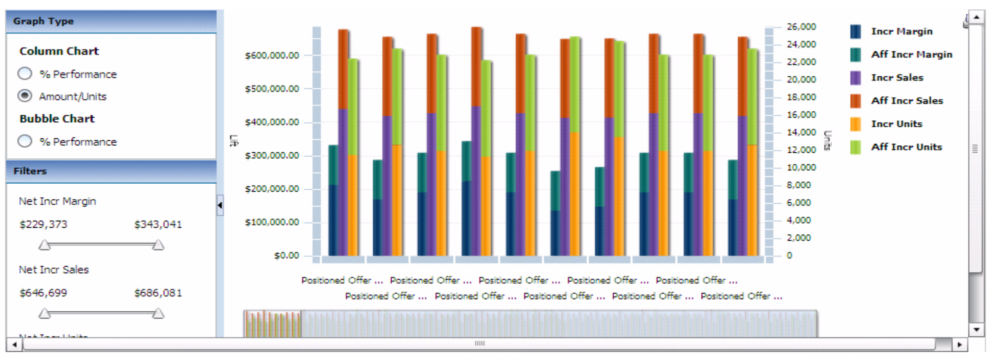


Column Chart—Amount/Unit

The Amount/Unit Column Chart displays Incr Margin, Aff Incr Margin, Incr Sales, Aff Incr Sales, Incr Units, and Aff Incr Units. The x–axis displays the Offer. The y–axis displays the Lift, and the z–axis displays the Units.

A menu is located along the left side of the screen allowing you to filter alter the appearance of the graph according to the metrics for Incr Margin, Aff Incr Margin, Incr Sales, Net Incr Margin, Net Incr Sales, and Net Incr Units, Aff Incr Sales, Incr Units, and Aff Incr Units.

Figure 5–51 Column Chart—Amount/Unit



Bubble Chart—%Performance

The x–axis displays the Sales Lift%, and the y–axis displays the Margin Lift%. The size of the bubble represents the Total Revenue.

Figure 5–52 Bubble Chart—%Performance

Viewing Graphs

Depending on which tab you are using within the Promotion Manager, you have the option of filtering your views of offers and categories using a Chart View. Chart View is a filtering option that enables you to view data in a performance graph format.

Graphs are viewable from the following areas within Promotion Planning and Optimization:

- Offers tab of the Promotion Manager
- Categories Tab of the Promotion Manager
- The Performance & What–If tab of the Offer Details Window
- Promotion Performance of the Vertical Tab
- All Pages View within the Vehicle Design tab
- The Offers tab of the Position Details window on the Vehicle Design tab

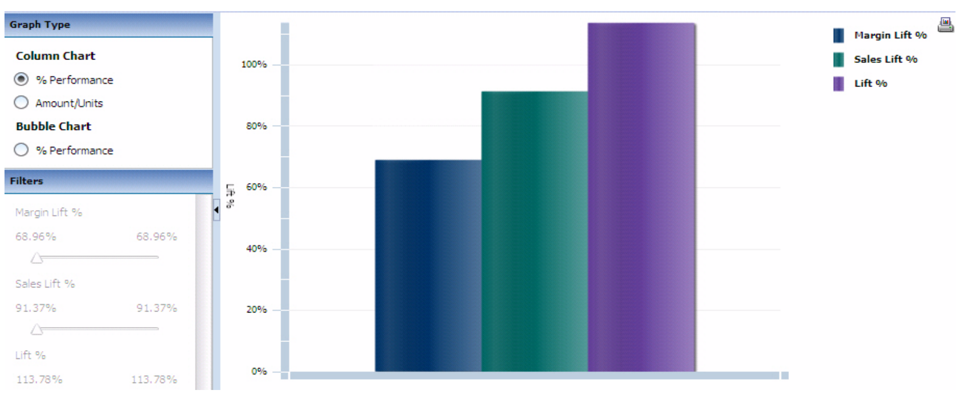
To view a graph from any of the above areas:

1. Select the Chart View filter option. The graph displays.
   - From the Offers tab of the Promotion Manager, you also have the option to view Positioned, Unpositioned or All Offers using the Position Type filter.
2. To return to a different view, select List View.

To view a graph from the Performance & What–If tab of the Offer Details window:

1. Click **Forecast** to complete a forecast for your offer(s).
2. Click **Graph** to view the performance metrics.

Figure 5–53 Promotion Performance Graph



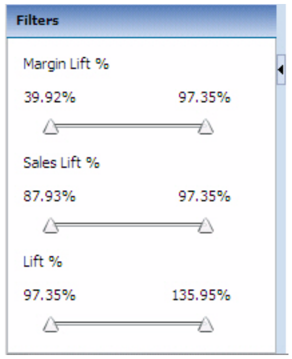
Showing/Hiding Graph Metrics

Metrics are displayed on the left side of the graph by default. You have the option of showing or hiding these metrics using the expand or collapse slider.

To hide graph metrics:

1. Select the arrow located to the right of the metrics.

Figure 5–54 Graph Metrics—Using the Sliding Bar to Show/Hide Metrics



2. To redisplay metrics, select the arrow once again.

Printing Graphs

To print a promotion performance graph:

1. Follow the steps to view a promotion performance graph using Viewing Graphs on page 5-54.
2. Select the print icon located in the upper left corner of the graph.

Figure 5–55 Print Icon

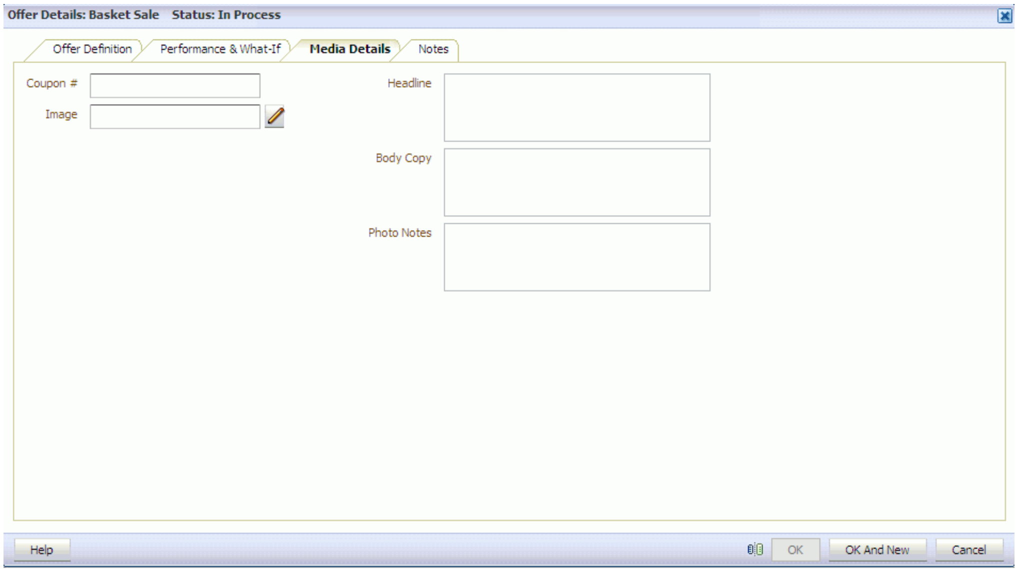
Media Details

Use the Media Details window to include media details for your offer such as images, headlines and body copy. When your offer is positioned within a vehicle, these details will be included.

To include Media Details:

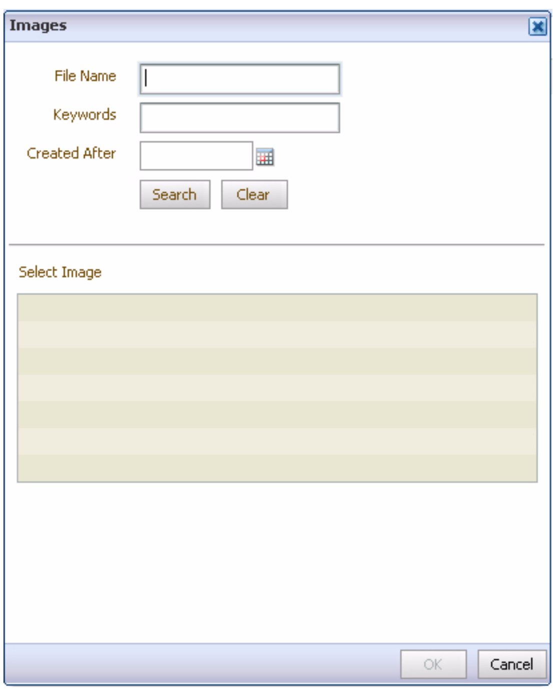
1. From the Offer Details window, select the Media Details tab.

Figure 5–56 Offer Details Window—Media Details Tab



2. Enter a Coupon number in the Coupon # field if applicable.
3. Select an image.
   a. Click the Search button (Pencil icon). The Images search window opens.

Figure 5–57 Images Search Window



   b. Enter search criteria.
      – **Filename**—enter all or part of the name of the file.
      – **Keywords**—enter keywords associated with the file.
      – **Created After**—select a date from the calendar.

c. Click **Search**. Results appear in the Select Image list.

d. Select the image to attach to the position. If no usable items are returned in your search results, select Clear.

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

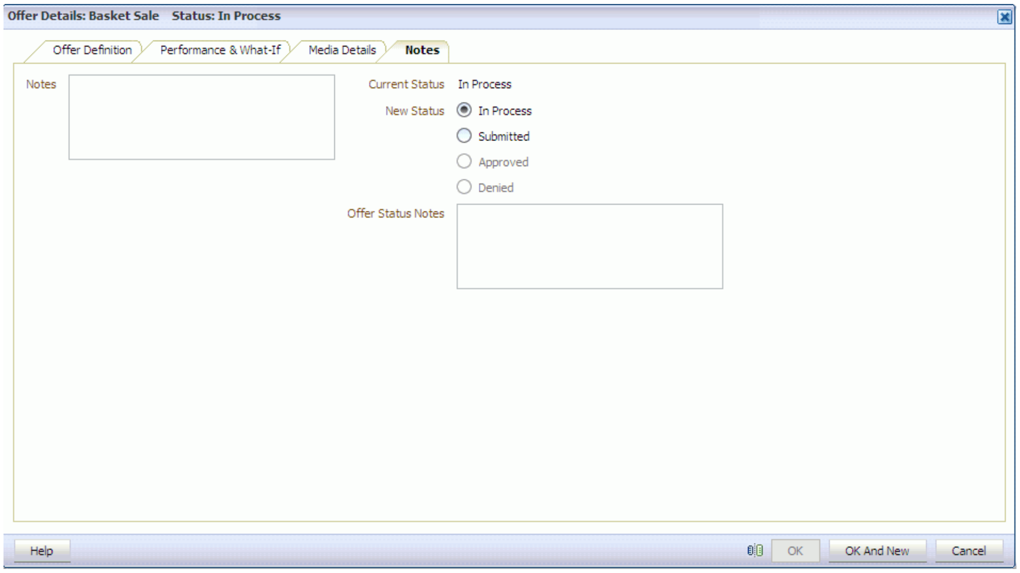
> **Note:** Click the **Delete** button to remove an image. Note that you will not get a delete confirmation request.

4. **Headline**—enter a headline.
5. Body Copy—enter Body Copy information.
6. Photo Notes—enter notes, if applicable.
7. Click **OK** to save the Media Details information for your offer and to exit the promotion. Select **OK and New** to save the Media Details for your offer and to enter a new offer.

Notes

Use the Notes tab of the Offer Details window to create notes for an offer or to update the Offer Status (e.g. Submitted, Approved or Denied) and enter a note for the status.

Figure 5–58 Offer Details Window—Notes Tab



Adding Notes to a New Offer

To add notes to a new offer:

1. Select the Notes tab from the Offer Details window.
2. If available for your implementation of Promote, select a **Priority**. Use the drop–down menu to select a priority.
3. **Notes**—enter notes about the offer.
4. **Current Status**—displays the offer's submission status (In Process, Submitted, Approved, Denied).
5. **New Status**—using one of the radio buttons, select a new status for the offer.
6. **Offer Status Notes**—enter notes about the offer's status.
7. (Optional) Select another tab from the Offer Details window to enter additional offer information.
8. Click **OK** to save the Notes information for your offer and to exit the promotion. Select **OK and New** to save the Notes for your offer and to create a new offer.

Adding Notes to an Existing Offer

To add notes to an existing offer:

1. Open an offer from the Offers tab of the Promotions Manager. The Offer Details window opens.
2. Follow steps 2 through 6 in Adding Notes to a New Offer on page 5-58.

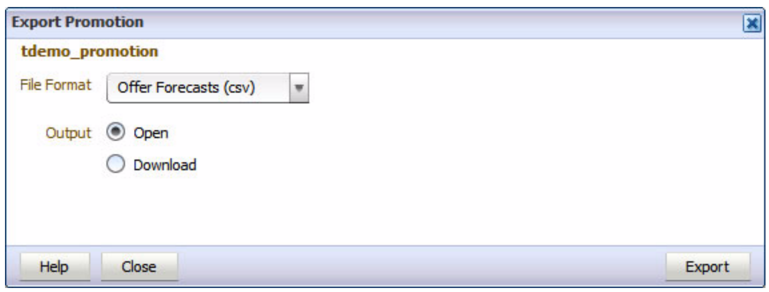
Export

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

To export a promotion:

1. Click the name of the promotion in Promotion Manager. The Promotion Details window opens to the right.
2. Click **Open**. The Promotion Manager opens.
3. Click the Export icon located in the upper right corner of the screen. The Export window opens.

Figure 5–59 Export Promotion Window



4. Select the file format.
   - Offers Details (csv)
   - Layout (xml)
   - Layout View (html)
   - Whole Promotion (xml)
   - Offer Forecasts (csv)
5. Select the Output of the file.
   - Open
   - Download
6. Click **Export** to export the file.

6
Vehicle Design

Use the Vehicle Design tab of the Promotion Manager to allocate space for promotion vehicles and position offers. Vehicles can be in the form of a circular, newspaper ad, E-mail, run of press or direct mail.

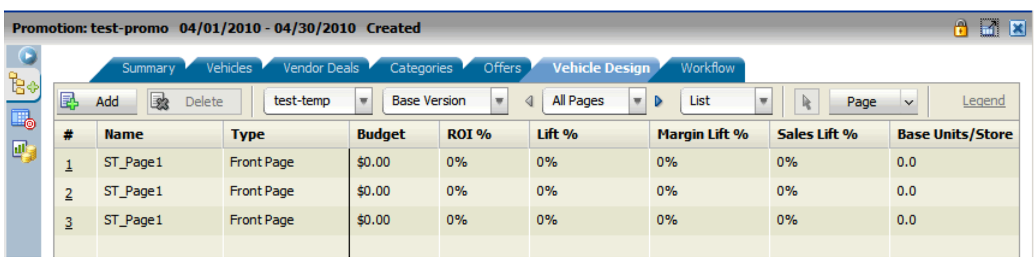
The following topics are available:

- Understanding the Vehicle Design Window
- Understanding Vehicle Positions
- Managing Vehicle Pages
- Managing Vehicle Page Positions
- Managing Vehicle Page Position Content

Understanding the Vehicle Design Window

The Vehicle Design window provides you with three options for viewing promotions: List View, Layout View, and Chart View. Within each of these views, options are also available for viewing individual pages.

Figure 6–1 Vehicle Design Tab of the Promotion Manager

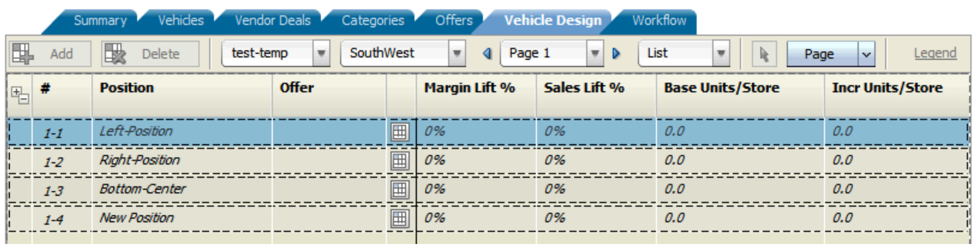


Inherited Pages

The application supports the concept of a base version in a promotion's vehicle in such a manner that each subsequent version provides changes from the base version. Without such changes each version inherits all of the pages, positions, positioned categories, positioned offers, and positioned attributes of the base version. This enables you to override individual positions in a page without overriding the whole page. Pages also line up across versions as opposed to being added to the version.

In all views, for versions other than the base version, inherited pages appear with dashed borders. In the List View, data in the inherited page rows appear italicized. You can click the inherited page and open it to override the positions. Metric data displayed in the List View is configurable using the promote.versioned.position.rollup parameter in the promote.properties file. In the Layout View, inherited pages appear with dashed borders. The page number links enable you to open and override positions.

Figure 6–2 Vehicle Design–Single Page–List View Displaying Inherited Pages



List View—All Pages

By default, all pages of the vehicle are listed in a table format with each row representing a single page. For information about the metrics listed, refer to Vehicle Design—List View—All Pages View on page A-12.

Table 6–1 Vehicle Design List View—All Pages

Field	Description
#	Page number.
Name	Name of page.
Type	Page type such as Front page, Standard page or Back page.

List View—Single Page

When an individual page is opened in list view, the following information is displayed:

Figure 6–3 List View—Single Page

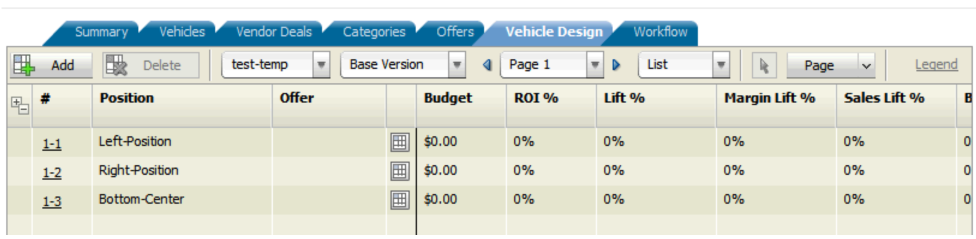


Table 6–2 Vehicle Design List View—Single Page

Field	Description
Expand/Collapse	Each row in the list represents a vehicle position. If an offer exists in that position, a +/- icon is located next to the row to expand and collapse the offers.
#	Page/Position or Page/Position/Offer
Position	Position Name
Offer	The name of the offer.

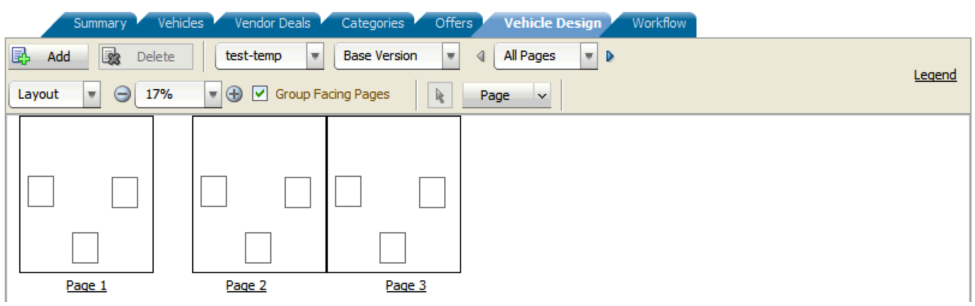
Table 6–2 (Cont.) Vehicle Design List View—Single Page

Field	Description
Position Menu	Displayed as a grid icon. Use this option to manage settings for positions on the page. For more information, see Editing Page Layout Using List View on page 6-16.
Category Name	Name of the category or categories assigned to the position. Hover your mouse over the row, and a small popup opens listing all category names assigned to the position.
Category ID	Comma separated list of all category ID numbers.
Offer Name	If an offer has already been added to the position, the offer name appears. If a category has been assigned to the position, the "Add" link is available to add an offer.
Notes	Notes from the position details or offer.

Layout View—All Pages

Use Layout view to view all your pages within your vehicle in a graphical format.

Figure 6–4 Vehicle Design Layout View All Pages



The following view options are available:

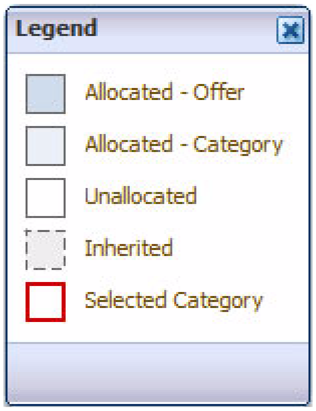
- Group Facing Pages—if this option is selected, facing pages will be displayed close together to provide a visual indication that they are facing pages.
- Custom View—Use the + and - buttons to zoom in and out or select a percentage zoom from the drop–down menu.

Vehicle Design Legend

Available within Layout View, the vehicle design legend provides information about the colors used to shade particular items within a promotion vehicle. To view the vehicle design legend:

- Click **Legend** in the upper-right corner of Vehicle Designer. Color coding for the following items is provided:
  - Allocated—Offer—shaded dark blue.
  - Allocated—Category—shaded light blue.
  - Unallocated—shaded white.
  - Inherited—dashed border with gray background.
  - Selected Category—outlined in red.

Figure 6–5 Vehicle Design Legend



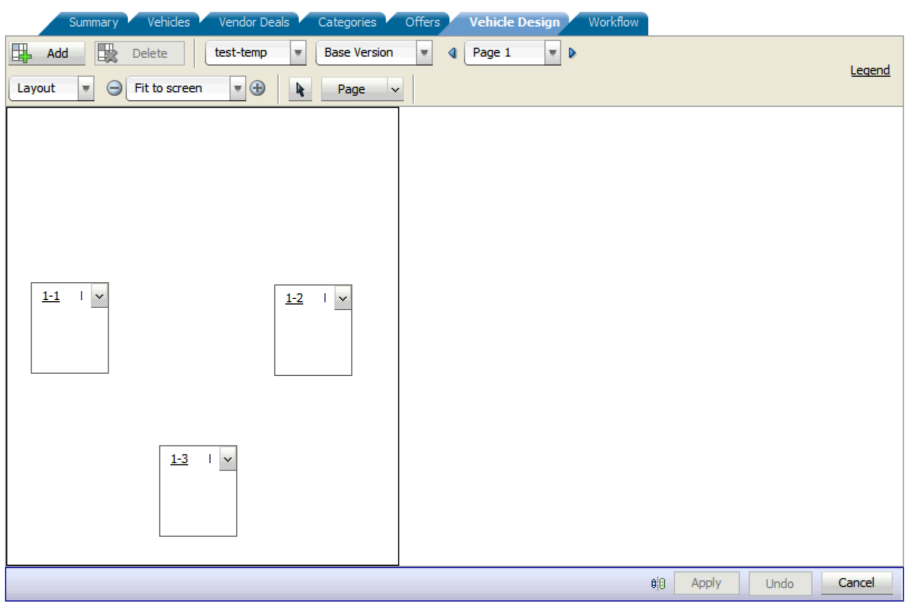
Informational Pop-ups

In Layout View, if you place your mouse over an offer name or a Category ID number, a small popup appears containing information about your item. If you place your mouse over an individual page, a promotion performance informational popup will open showing the performance of your promotion.

Layout View—Single Page

Use Layout view to view a single page in a graphical format.

Figure 6–6 Layout View—Single Page



When viewing individual pages in layout view, the following view options are available:

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

Additional information that is also displayed is as follows:

- Offers—positions with one or more offers assigned to it will display the offers by name in a list. Each offer name is displayed as a hyperlink. By selecting an offer link, the Offer Details window will open showing the details for that offer.
- Assigned Categories—for categories assigned to a position, the category id numbers will be viewable within the position.
- Performance Metrics—by placing your mouse over a position, you can view performance metrics for the position.

Chart View—All Pages and Single Page

Use Chart view to view all pages within your vehicle in a performance graph format. Metric information is available for each page within your vehicle. You can switch between a Column Chart or a Bubble Chart, and then set a filter using the sliders for the selected metrics to drill down to the information you want to analyze. For more information, see Graph on page 5-52.

In the Column Chart, each position in the page is represented on the X-axis. The Y-axis displays the Margin Lift %, Sales Lift %, or Lift %. The Bubble Chart displays the performance information based on the Margin Lift % to the Sales Lift %.

To switch to the Chart view,

- From All Pages or single page layout, select **Chart** in the **View** drop-down list.

Viewing Vehicle Version Groups

A single promotion can use multiple vehicles. Using either List, Layout, or Chart View, you can view the version groups associated with a promotion.

Two drop down lists are available to assist you in viewing vehicle version groups as follows:

Figure 6–7 Vehicle and Version Groups Drop–Down Menus

- Vehicle—select a vehicle from the list of vehicles.
- Version Groups drop–down—for the vehicle selected, select the version group you wish to view.
  - The Base option refers to the default vehicle. Select this option to make changes to the overall design of the vehicle.
  - When a version group is selected from the list, the pages that are displayed in Vehicle Design will show overridden pages or pages that have been added.

Understanding Vehicle Positions

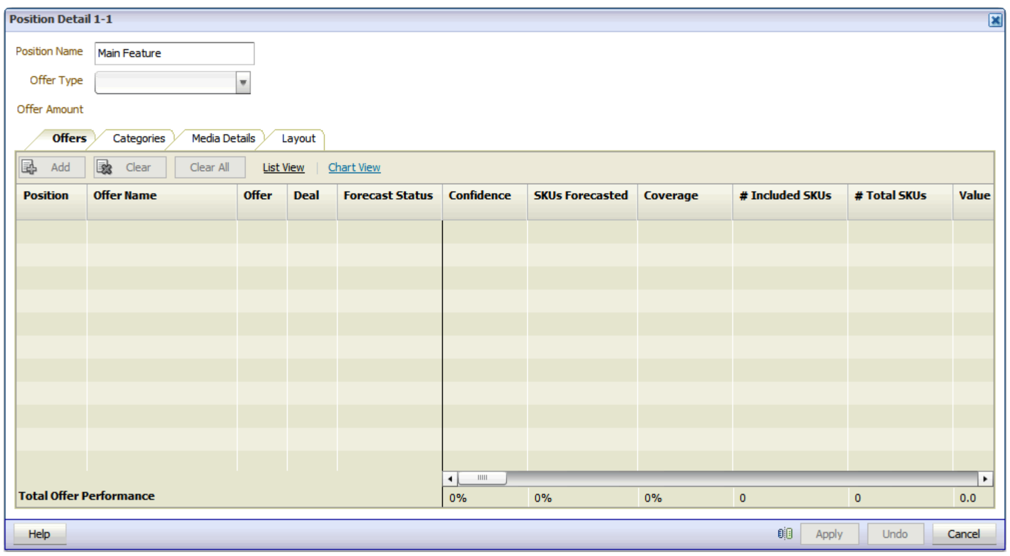
Vehicle pages are composed of positions where promotional content is stored. You can view vehicle positions using the Position Detail window.

Position Details Window

Use the Position Details window to view information about existing offers and categories assigned to a specific position or use it to assign categories and place offers onto a page. To open the position details window, view a single page in either list or layout view and select the position link.

The Position Details window displays four tabs: Offers, Categories, Media Details, and Layout. For more information, see Assigning Categories to Vehicle Positions on page 6-22 and Placing an Existing Offer into a Position on page 6-23.

Figure 6–8 Position Details Window with the Offer Tab Selected



The Position Details window displays the following information:

Table 6–3 Position Details—Available Information

Field	Description
Position	Enter a name for the position.
Offer Name	The name of the offer.
Offer	Specify the offer types that are valid for use in this position.
Deal	List vendor deal information, if applicable.
Forecast Status	The forecast status of the offer.

Note: Once you click the Edit button, the Position Details window includes the following buttons to save or revert changes:

- Click the Apply button to save changes.
- Click the Undo button to revert back any unsaved changes and release the lock on a document without closing it.
- Click the Cancel button to revert any unsaved changes and close the screen.

Offers within the Position Details Window

Use this tab to assign offers to the position. Offers already assigned to the position display the information listed in Table 6–4, " Positioned Offers—Available Information".

You also have the ability to perform the following actions from the Offer tab:

- Add—if categories have already been assigned to the position, the add button is available to assign an offer to the position. For more information about assigning an offer to a position, see Placing an Existing Offer into a Position on page 6-23.
- Clear—use this option to remove an assigned offer. To delete the offer, click it once to highlight it. Click Clear to remove it.
- Clear All—use this button to clear the offers for the selected position.
- List View—view all offers assigned to the position in list form.
- Chart View—view all offers assigned to the position in a graph format. For more information about the graph, see Graph on page 5-52.

Note: You can select multiple rows by holding down the CTRL or SHIFT keys and clicking the rows you want. However, multi-row drag and drop re-ordering of segments are not allowed.

Table 6–4 Positioned Offers—Available Information

Field	Description
Position	The position and segment of the offer.
Category	Category ID number.
Offer Name	Name of the offer.
Offer	Type of Offer (% Off, $Off, etc.).
Forecast Status	Current status of the forecast.
Confidence	Level confidence in the system generated forecast metrics.
SKUs Forecasted	The number of the SKUs forecasted.

Additional offer related information is also available. Refer to Offers Tab—Individual Offer Details and Metric Definitions on page A-5.

Categories within the Position Details Window

Use the Categories tab to manage the categories assigned to the position. View information about existing categories, add new categories, or delete categories. The categories tab provides the following information as shown in Table 5-7. For more information, see Assigning Categories to Vehicle Positions on page 6-22.

Figure 6–9 The Categories Tab of the Position Details Window<-SCREEN

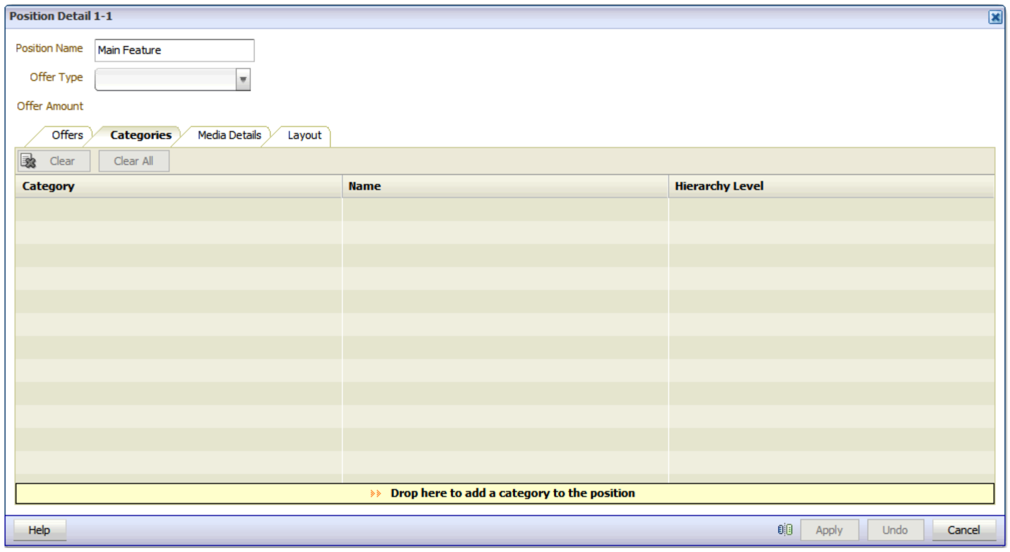


Table 6–5 Position Details Window—Assigned Category Information

Field	Description
Category	The number of the category assigned to the position.
Name	Name of the category.
Hierarchy Level	Hierarchy level of the assigned category (e.g. Class, Subclass).

Media Details in the Position Details Window

Use the Media Details tab of the Position Details window to add media details about the position. Medial details include the following:

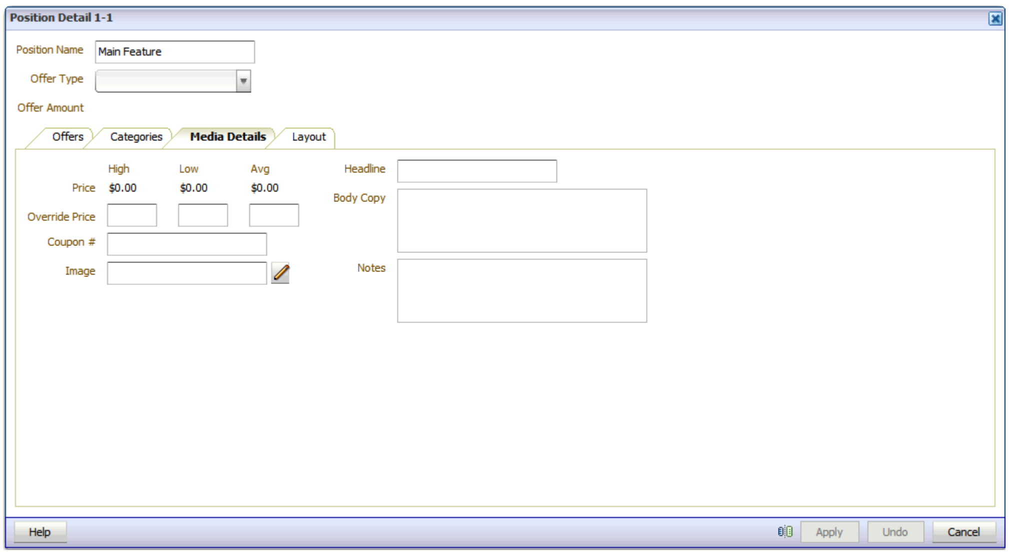
Table 6–6 Position Details Window—Media Details Information

Field	Description
Position Name	Name of the position.
Offer Type	The offer types that are valid for assignment to this position.
High Price	Maximum of the high prices of all the offers in the position. Use the High Override Price field to override the high price for this position.
Low Price	Minimum of the low prices of all the offers in the position. Use the Low Override Price field to override the low price for this position.
Avg Price	Average of all the average prices of offers in the position. Use the Avg Override Price field to override the average price for this position
Coupon #	If applicable, include a coupon number.

Table 6–6 (Cont.) Position Details Window—Media Details Information

Field	Description
Image	If applicable, add an image for display in the promotion.
Headline	Enter headline text.
Body Copy	Enter body copy.
Notes	Add notes.

Figure 6–10 Position Details Window—Media Details Tab

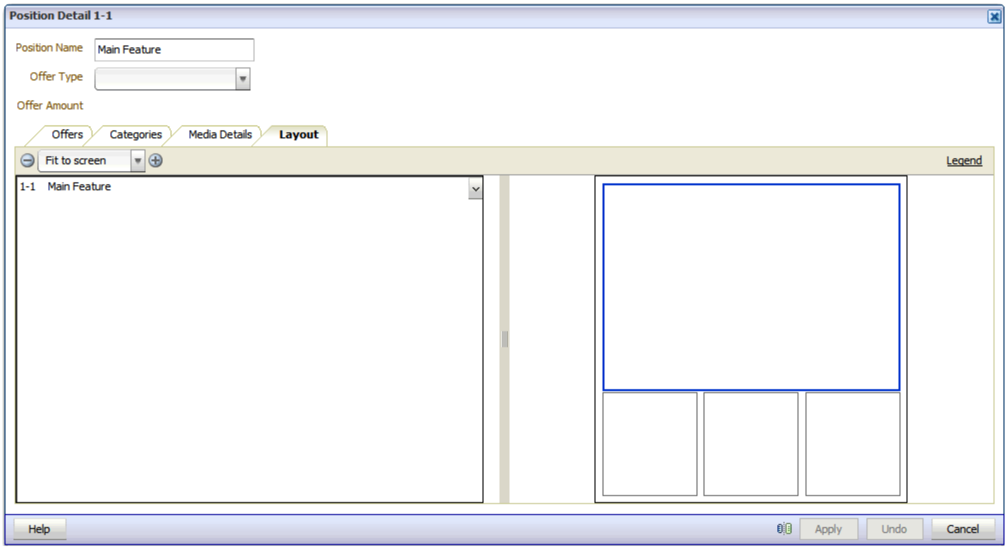


Layouts in the Position Details Window

The Layout tab displays the position layouts graphically. The layout diagram of a position appears as a single block with a list of categories and list of offers for a position. You can drag categories and offers to this tab.

A slider bar separates the position diagram from the thumbnail diagram. This bar can be dragged left or right to resize the two sides with respect to each other. The thumbnail diagram is a read-only representation to provide a context on the position's relative size and orientation. Position being currently viewed is highlighted in the thumbnail diagram.

Figure 6–11 Position Details Window—Layout Tab



You also have the following features available on the Layout tab:

- Zoom menu and buttons to zoom in or out from the position diagram.
- When you click the down arrow on the top right corner of the position diagram, the following options are available:
  - Add Offer option to add offer on the position.
  - Cut, Copy, Paste, and Delete Contents options to edit the contents of the position.
  - Delete Contents option to clear the categories and offers in the position.
- The relevant metrics appear as hover text when you hover the mouse cursor over each position on the single page layout view.
- On the top right corner of the tab, the Legend link enables you to view the coloring scheme used in the layout view.
- View state (list, layout, and chart) of a page are maintained when users drill into the position.

Managing Vehicle Pages

You have the following options to manage vehicle pages:

- Viewing Pages in a Vehicle on page 6-10.
- Adding Pages to a Vehicle on page 6-11.
- Reordering Pages in a Vehicle on page 6-11.
- Deleting a Vehicle Page on page 6-12.
- Editing a Vehicle Page on page 6-12.

Viewing Pages in a Vehicle

To view pages in a vehicle:

1. In List View—Select "All Pages" or individual page numbers from the Page List drop-down menu.
2. In Layout View—Select "All Pages" or individual page numbers from the Page List drop-down menu. Use the "# of Pages Across" drop down menu to make additional adjustments.

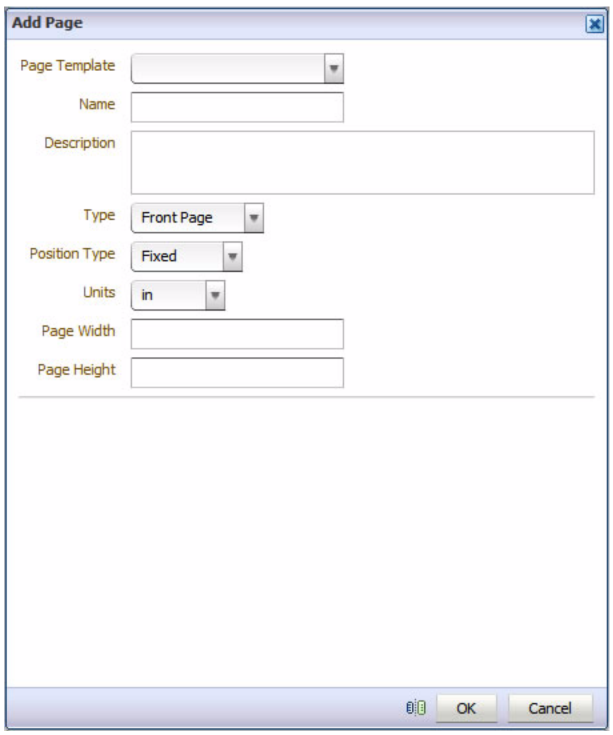
Adding Pages to a Vehicle

To add pages to a vehicle:

> **Note:** You must have an exclusive lock on the promotion to add or edit a vehicle and add or edit version groups in a vehicle.

1. Using All Pages view, click **Add**. The Add Page window opens.

Figure 6–12 Vehicle Design Add Page Window



2. **Page Template**—select the template to use.
3. Click **OK**. The page is added to the vehicle, and the details appear on the table of the vehicle design window.

Reordering Pages in a Vehicle

To reorder pages in a vehicle:

> **Note:** You must have an exclusive lock on the promotion to add or edit a vehicle and add or edit version groups in a vehicle.

1. In Layout View, drag the page to a new location.
2. In List view, drag the page to a new row.

> **Note:** You can reorder pages on base versions only.

Deleting a Vehicle Page

To delete pages from a vehicle:

> **Note:** You must have an exclusive lock on the promotion to add or edit a vehicle and add or edit version groups in a vehicle.

1. Using List View or Layout View, select the desired page from the list of pages within the vehicle design window.
2. Click **Delete**. The Confirm window opens.
3. Click **OK**. The page is removed from the vehicle.

Editing a Vehicle Page

To edit a vehicle page:

1. Using the List or Layout view, select the desired page.
2. Obtain an exclusive lock on the page, by performing one of the following:
   - Click the **Lock** icon on the top right corner of the window.
   - Click **Edit** on the bottom right corner of the window.

   Once you get an exclusive lock, the **Apply**, **Undo**, and **Cancel** buttons appear in place of the **Edit** button.

   When you obtain a lock on a page, the page is automatically updated to ensure that the current revision is made available for editing. In case you try opening a page that was deleted by another user, an error message will appear.
3. Once you complete editing the vehicle page, click **Apply** to save your changes.

   Or

   Click **Undo** to revert back any unsaved changes and release the lock on a document without closing it.

   Or

   Click **Cancel** to revert any unsaved changes and close the screen.

> **Note:** For pages with deleted promotions, you can open the page for editing and make the changes. When you apply the changes and close the promotion, the promotion will no longer appear in the calendar.

Access Privileges for Editing a Page

Users must have the appropriate access privileges to edit a page. Users with access privileges of a Category Manager can lock the page while they make changes to the contents of the positions that are assigned their categories. For example, if a position is assigned one of their categories, they can make changes to its contents.

The following configuration parameter has been added to the *promote.properties* file that enables users with the access privileges of a Category Manager to automatically lock the entire page when they open a page for editing (in place of locking each individual position):

```
promote.category.manager.lock.pages
```

Setting Up Vehicle Page Attributes

The Page Attributes window enables you to change the template or dimensions of any page, including the template pages. You can access the Page Attributes window by clicking the Page Attributes option from the Page drop-down list in a Single Page View. Although this feature is enabled for all users, the Page Attributes window is only editable when the page is locked.

Note: The Page Attributes window appears read-only for users who do not have the right privilege or when the page is locked by another user.

To set up vehicle page attributes:

1. Using List or Layout view, from the Page drop-down menu, click **Page Attributes**. The Page Attributes window appears.
2. Enter relevant information in the following fields:
   - **New Template –** Select a new template. Page templates are typically set with the page attributes. In case you select a new template, the other fields on this window are disabled and appear greyed out.

   Note: To change the attributes for the new template, after switching to the new template, you must open the Page Attribute window again.

   - **Name –** Enter or edit a page name.
   - **Description –** Enter or edit a description of the page.
   - **Type –** Select the type of page. Options include **Front Page**, **Back Page**, and **Standard Page**.
   - **Position Type –** Select the type of position. Options include **Fixed** and **Dynamic**.
   - **Units –** Select the units to be used for the page. Options include inches (**in**), centimeters (**cm**), and **pixels**.
   - **Page Width –** Enter a width for the page.
   - **Page Height –** Enter a height for the page.
3. Click **OK**.

Note: If you change templates or switch between the Fixed and Dynamic position types, you will lose all your previous work including the assignment of categories and the placement of offers.

Duplicating a Vehicle Page

Ability to duplicate a base page with all it's positions, categories, and positioned offers within the same vehicle in a promotion.

To duplicate a page:

1. On the **Vehicle Design** tab, in the All Pages List or Layout view, select a page.
2. From the **Page** drop-down menu, click **Duplicate Page**.

The Duplicate Page option appears disabled for inherited or missing pages. You must have an exclusive lock on the promotion to duplicate a page.

> **Note:** Duplicating the positioned offers in a page depends on the configuration setting for multi-positioning offers (*promote.promo.positioned.offers.unique* parameter in the *Promote.properties* file). When set to false, duplicating a page will copy all the positioned offers. When set to true, duplicating a page will copy the positions and categories only.

Managing Vehicle Page Positions

Use the sections that follow to edit the position layout of a vehicle page. Positions can either be empty or filled. There are two options for editing page positions:

- Toolbar Options on page 6-15.
- Editing Page Layout Using List View on page 6-16.

In order to use these features, you must have the Ad Planner role and management rights within a promotion's vehicle designer. You must also open the promotion and obtain an exclusive lock for editing.

> **Note:** These changes affect only the page as it exists in the promotion and do not change the template associated with the page.

Editing Page Layout Using Layout View

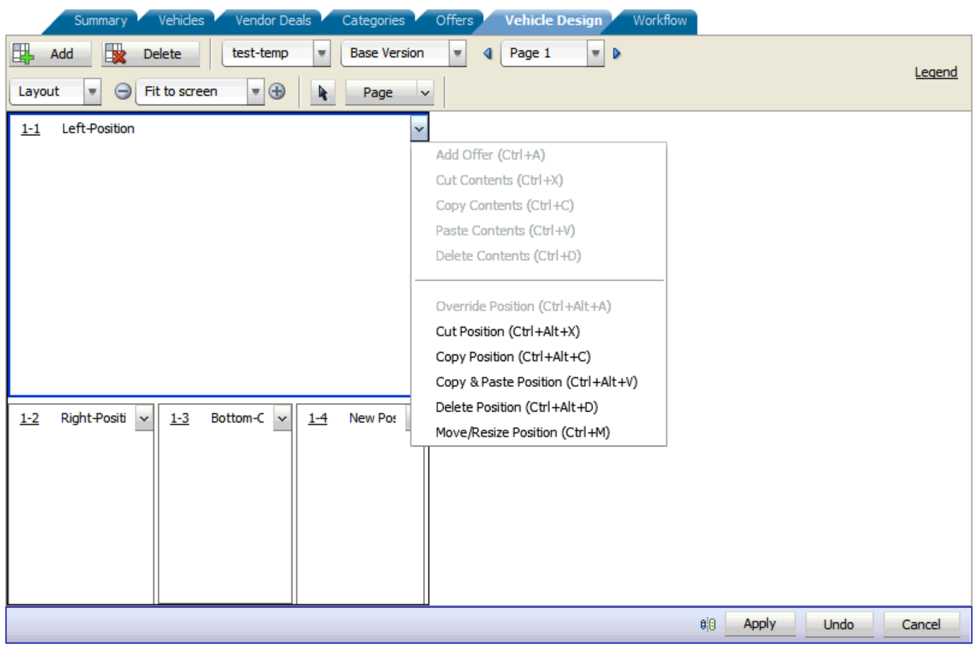
Using the Layout view within the vehicle design tab, you can change the layout of a page for a promotion. You have the following options for editing page layout using list view:

- Dragging and Dropping Page Positions on page 6-15.
- Adding Page Positions on page 6-18.
- Cutting and Pasting Page Positions on page 6-18.
- Duplicating Page Positions on page 6-18.
- Moving/Resizing Positions: Using the Position Dimensions Pop–Up on page 6-19.
- Moving/Resizing Positions: Using the Toolbar Arrow on page 6-19.
- Overriding Page Positions on page 6-21.
- Deleting Page Positions on page 6-20.

Toolbar Options

The arrow icon, Position menu, and Page menu are available from the toolbar when editing page layout using list view. Use these features in combination with the instructions that follow to edit page positions.

Figure 6–13 Layout View—Position Menu Selected



Dragging and Dropping Page Positions

To drag and drop positions:

1. From the vehicle design tab, open a single page using layout view.
2. Select the arrow icon from the toolbar.
3. Click once onto the desired position to select it, and continue holding the mouse button. The position is highlighted with a blue border indicating that it is selected.

   > **Note:** Each position displays the current width, height, and location co-ordinates based on the X and Y axes. When you drag and drop, move, or resize the positions, the relevant co-ordinates, width, and height values change to give you a better understanding of the size and the location of the position.

4. Without releasing the mouse button, drag the position to a new position on the page. Release the mouse button.
5. Click **Apply** to save your changes.

   Or

   Click **Undo** to revert back any unsaved changes and release the lock on a document without closing it.

   Or

   Click **Cancel** to revert any unsaved changes and close the screen.

Editing Page Layout Using List View

It is also possible to edit page layout using list view.

About Editing Page Layout in List View A new toolbar is activated when editing page layout in list view as pictured below.

Figure 6–14 Editing Page Layout in List View—Position Menu, Page Menu & Arrow Icon

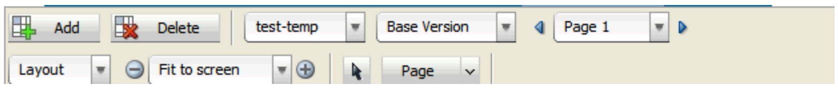


Figure 6–15 Editing Page Layout in List View—Close Up of Position Menu Grid

Adding Page Positions To add a position to a page in list view:

1. Click **Add** from the toolbar
2. A new position is placed at the end of the list of positions.

Cutting Page Positions To cut a page position in list view:

1. Select a position by clicking once into its row.
2. Use the Position menu next to the offer name in the grid and select **Cut Position**.
3. The position is cut from the page. Click **Apply** to save changes to the page.
4. To paste the position to a new page, navigate to the new page. From the Position menu, select **Paste Position**.
5. Click **Apply** to save your changes.

   Or

   Click **Undo** to revert back any unsaved changes and release the lock on a document without closing it.

   Or

   Click **Cancel** to revert any unsaved changes and close the screen.

Duplicating Page Positions To duplicate a page position in list view:

1. Select a position by clicking once into its row.
2. Use the Position menu next to the offer name in the grid and select **Copy & Paste Position**.
3. A new position is added to the bottom of the list.
4. Click **Apply** to save your changes.

   Or

   Click **Undo** to revert back any unsaved changes and release the lock on a document without closing it.

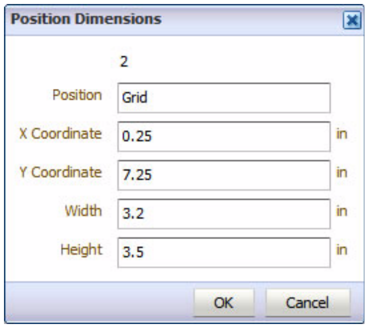
   Or

   Click **Cancel** to revert any unsaved changes and close the screen.

Moving or Resizing Page Positions To move or resize a position in list view:

1. Select a position by clicking once into its row.
2. Use the Position menu next to the offer name in the grid and select Move/Resize Position.
3. The Position Dimensions window opens as follows:

Figure 6–16 Position Dimensions Window



4. Enter the following:
   - Name
   - X Coordinate
   - Y Coordinate
   - Width
   - Height
5. Click **OK**. The new position is added to bottom of the list.
6. Click **Apply** to save your changes.

   Or

   Click **Undo** to revert back any unsaved changes and release the lock on a document without closing it.

   Or

   Click **Cancel** to revert any unsaved changes and close the screen.

Overriding Page Positions To override a page position:

1. Click once onto the desired position to select it.
2. Use the Position menu next to the offer name in the grid and select the **Override Positio**n option.

A new blank position is created with the same page and position number. It inherits the co-ordinates from the base position that has the same position number. If the base position is renumbered, all position overrides are updated to the new position number so they continue to override the block at the same location.

The position overrides inherit the base position co-ordinates and size. When the base position is moved or resized, the change is reflected in the overriden positions as well. If a base position is deleted, the relevant position overrides are deleted.

A position override can be removed by clicking the **Delete Position** option or selecting a position row and clicking **Delete** in the toolbar.

Deleting Page Positions To delete a page position:

1. Click once onto the desired position to select it.
2. Click **Delete** from the toolbar.
3. The position is deleted.

Adding Page Positions

To add a position to a page in layout view:

> **Note:** This feature is available for base versions only.

1. Click **Add** from the toolbar.
2. A new position is added to the page and positioned in the bottom right corner of the page.
3. Click **Apply** to save your changes.

   Or

   Click **Undo** to revert back any unsaved changes and release the lock on a document without closing it.

   Or

   Click **Cancel** to revert any unsaved changes and close the screen.

Cutting and Pasting Page Positions

From each page position, a drop-down menu is available that allows you to cut and paste page positions. To cut a page position:

1. Select a position.
2. In the upper right corner of the selected position, click onto the drop–down menu.
3. Select either **Cut Position**.
4. Navigate the page where you want to paste the position. From the Page drop–down menu, select **Paste Position**.
5. Click **Apply** to save your changes.

   Or

   Click **Undo** to revert back any unsaved changes and release the lock on a document without closing it.

   Or

   Click **Cancel** to revert any unsaved changes and close the screen.

Duplicating Page Positions

To duplicate a page position:

1. Select a position.
2. In the upper right corner of the selected position, click onto the drop–down menu.
3. Select **Copy & Paste Position**.

4. A new position with the same dimensions as the original position is placed at the same position.
5. Click **Apply** to save your changes.

   Or

   Click **Undo** to revert back any unsaved changes and release the lock on a document without closing it.

   Or

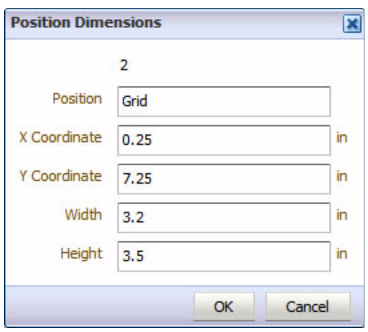
   Click **Cancel** to revert any unsaved changes and close the screen.

Moving/Resizing Positions: Using the Position Dimensions Pop–Up

To move or resize a position using the Position Dimensions pop–up:

1. Select a position.
2. In the upper right corner of the selected position, click onto the drop–down menu.
3. Select **Move/Resize Position**.
4. The Position Dimensions window opens as follows:

Figure 6–17 Position Dimensions Window



5. Enter the following:
   - **Width**—enter the width of the position in inches.
   - **Height**—enter the height in inches of the position.
   - X Coordinate (optional)
   - Y Coordinate (optional)
6. Click **OK**. The new position is added to the page.
7. Click **Apply** to save your changes.

   Or

   Click **Undo** to revert back any unsaved changes and release the lock on a document without closing it.

   Or

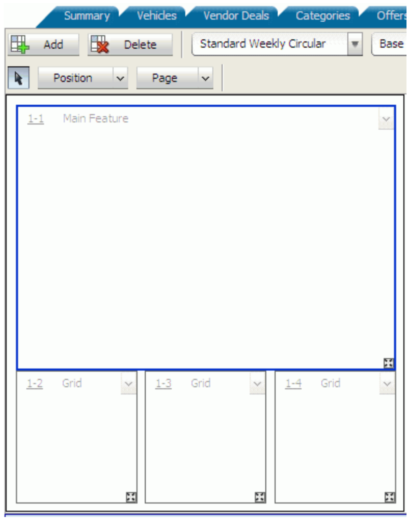
   Click **Cancel** to revert any unsaved changes and close the screen.

Moving/Resizing Positions: Using the Toolbar Arrow

To move or resize positions using the toolbar arrow:

1. Select the arrow button from the toolbar.
2. Drag handles appear in the lower right corner of each position on the page as follows:

Figure 6–18 Resize Position Drag Handles



> **Note:** Each position displays the current width, height, and location co-ordinates based on the X and Y axes. When you drag and drop, move, or resize the positions, the relevant co-ordinates, width, and height values change to give you a better understanding of the size and the location of the position.

3. Click once onto a position to select it. The cursor turns into an arrow.
4. Click once onto the drag handle of the position you wish to move/resize.
5. Hold down the mouse button. Drag the corner of the position to resize it. Release the mouse button.
6. Click **Apply** to apply and save your changes.

   Or

   Click **Undo** to revert back any unsaved changes and release the lock on a document without closing it.

   Or

   Click **Cancel** to revert any unsaved changes and close the screen.

Deleting Page Positions

To delete a page position:

> **Note:** A position override can be removed by clicking the **Delete Position** option or selecting a position row and clicking **Delete** in the toolbar.

1. Click once onto the desired position to select it.

2. Click **Delete** from the toolbar.
3. The position is deleted.

Overriding Page Positions

To override a page position:

1. Click once onto the desired position to select it.
2. Click once onto the **Position** menu and click the **Override Positio**n option.

A new blank position is created with the same page and position number. It inherits the co-ordinates from the base position that has the same position number. If the base position is renumbered, all position overrides are updated to the new position number so they continue to override the block at the same location.

The position overrides inherit the base position co-ordinates and size. When the base position is moved or resized, the change is reflected in the overriden positions as well. If a base position is deleted, the relevant position overrides are deleted.

A position override can be removed by clicking the **Delete Position** option or selecting a position row and clicking **Delete** in the toolbar.

Renumbering Page Positions

Once you have completed working on the page positions (adding, moving, resizing, deleting positions), you can use the Renumber Positions feature to renumber the positions on a page and sort them based on the X-Y axes co-ordinates.

> **Note:** The *promote.page.renumberTopDown* parameter in the *promote.properties* configuration file sets the renumbering to sort based on "y,x" (top and down) or "x,y" co-ordinates. For more information on this parameter, refer to the *Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Configuration Guide*.

To renumber page positions:

1. In the Layout view, under the **Page** drop-down menu, click **Renumber Positions**. The page layout gets updated to reflect the position numbers sorted based on the order set in the configuration parameter.
2. Click **Apply** to save your changes.

   Or

   Click **Undo** to revert back any unsaved changes and release the lock on a document without closing it.

   Or

   Click **Cancel** to revert any unsaved changes and close the screen.

Managing Vehicle Page Position Content

After you have managed the positions for your vehicle pages, you can use the following to place promotional content on those pages:

- Assigning Categories to Vehicle Positions on page 6-22.
- Placing an Existing Offer into a Position on page 6-23.

- Cutting, Pasting, and Clearing Offers on page 6-22.
- Clearing an Offer from a Position on page 6-24

Assigning Categories to Vehicle Positions

To assign categories to positions within a promotion vehicle:

1. Select a Page
   - Using List View, select a page and open it. Select the desired position/segment number.
   - Using Layout View, select a page. Select the desired position/segment number in the upper left corner of the position.
2. The Position Details window opens. Select the Categories tab.
3. Open the Merchandise Selector.
4. Drag and drop desired categories onto the "Drag Category here to add to a position" bar located at the bottom of the Position Details window.
   - If categories have already been assigned to your promotion, select "Assigned Categories" from the Browse menu. Drag and drop categories from the hierarchy onto the "Drag Category here to add a position".
   - If no categories have been assigned, locate items or categories of items from the Merchandise Hierarchy. You also have the option of searching for merchandise items or categories and filtering your selections. Please refer to Adding Categories to a Promotion on page 5-17 for more information.

Figure 6–19 Drag Category Here Bar

Note: Categories that are added here will also be added to the Categories tab and the Assigned Categories list in the Merchandise Selector.

Cutting, Pasting, and Clearing Offers

Using Layout View within the Vehicle Designer, options are available to cut and paste offers within positions and to clear all offers from a position.

To access these options do the following:

1. Locate a position and segment that already has a category and offers assigned to it. In the upper right corner of the position/segment, open the drop down list and select one of the following:
   - Cut Contents—cut a category and related offer(s) from a position.
   - Paste—paste a category and related offer(s) into a position.
     - Empty position—if the position is empty (no category or offer assignment), the new category and offer(s) will be pasted
     - Full position—the position has a category and offer(s) assigned to it. You will be prompted to either Replace the contents or Add to the contents.
   - Clear All Offers—clears the offer(s) for the selected position.

2. When a position is selected, a Position drop down menu also becomes available along the main toolbar. Options to Add Offers, Cut, Paste, Clear, and Clear All Offers are also available.

Positioning Offers within a Vehicle

You have a number of options for positioning offers within vehicles. You can position existing offers using the Offers option within the Hierarchies Selector or create and position new offers. A single offer can be placed in multiple positions and vehicles. Multiple offers can be assigned to the same position.

Placing an Existing Offer into a Position

To place an existing offer into a position:

1. Open a Position.
   - Using List View, select a page and open it by selecting the page number. Click onto the desired position/segment number.
   - Using Layout View, select a page. Click onto the position/segment number in the upper left corner of the desired position.
2. The Position Details window opens. Select the Offers tab.
3. Open the Merchandise Hierarchy.
4. Select **Offers** from the Browse field. Two types of offers appear:
   - Positioned—Offers already assigned to a position in the vehicle.
   - Unpositioned—Offers not yet positioned in the vehicle.
5. Drag an offer from one of these folders to the "Drop here to add an offer to the position" bar at the bottom of the page. Any offer that is assigned to a position must come from the same category that has been assigned to the position.
6. Drag and drop additional offers from the Merchandise Hierarchy as desired. All offers assigned to the position must come from the same category that is assigned to the position.
7. Click **OK** to save.

Create and Position a New Offer

To create and position a new offer:

1. Open a page, and select the **Add Offer** option.
   - In List View, open a page. Positions/segments with category assignments will have the "Add" link available within the "Offer Name" column. Select the link from row of the desired position/segment to add an offer.
   - In Layout View, open a page. Locate a position and segment that already has a category assigned to it (shaded in light blue). In the upper right corner of the position/segment, use the drop down list to select "Add Offer". The Position Details window opens with the Offers tab selected. Click "Add" to add a new offer.
2. The Offer Details Window opens. Multiple offers can be assigned to the same position. Use the "Ok and New" option while creating your offer to create and position additional offers. All offers assigned to the position must come from the same category that has been assigned to the position. For complete instructions, please refer to Adding An Offer on page 5-24.

Clearing an Offer from a Position

To clear an offer from a position:

1. Open a Position on a page using either List View or Layout View.
2. The Position Details Window opens in List View. All offers assigned to the position are listed.
3. Click once onto an offer to highlight it.
4. Click **Clear**. The offer is removed from the position.

7

Workflow

Use the Workflow tab of the Promotions Manager to create and administer the promotion's schedule. Roles, permissions, and ownership determine the activities a user can perform on a promotion in a given phase. Track the progress of an event through phases, tasks, and milestones. Enter expected start and end dates for a workflow event, and then compare to actual completion dates for analysis.

About Workflow

Standard workflow phases include:

- Created
- Planning
- Running
- Completed

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

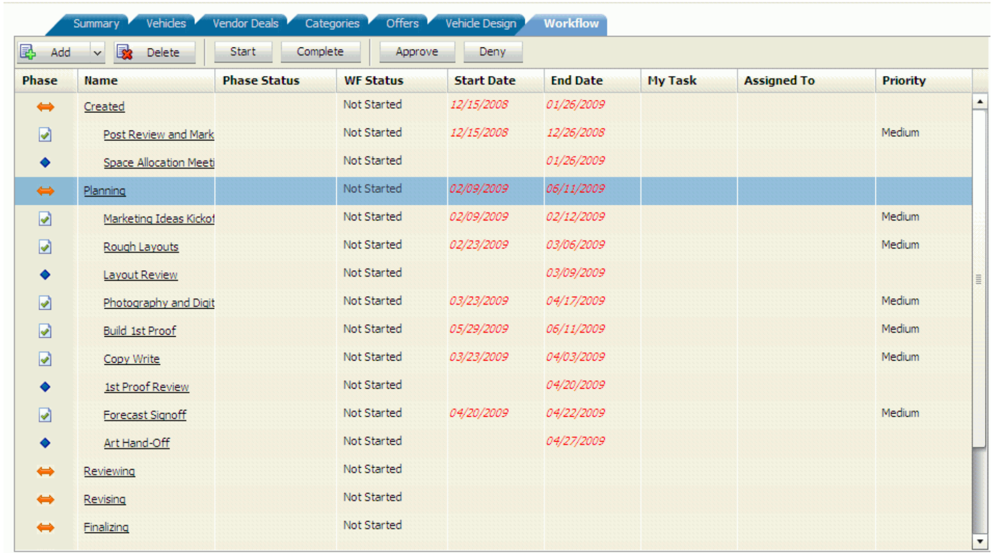
Start and End dates are highlighted in red if the planned date is past due. Start dates are italicized if the phase has not been started. End dates are italicized if the phase is not complete.

Adding a Task

To add a task to the workflow:

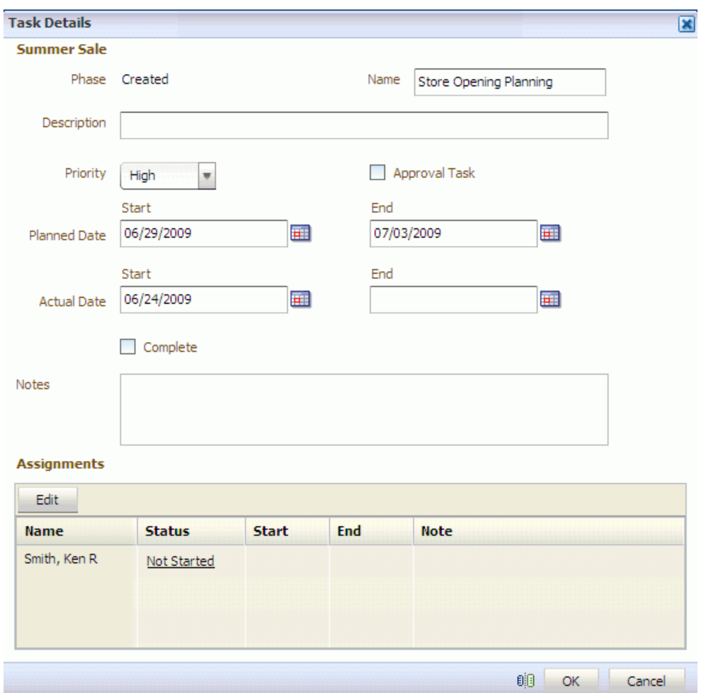
1. Select the Workflow tab from Promotion Manger. The Workflow window opens.

Figure 7–1 Promotion Manager Workflow Tab



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

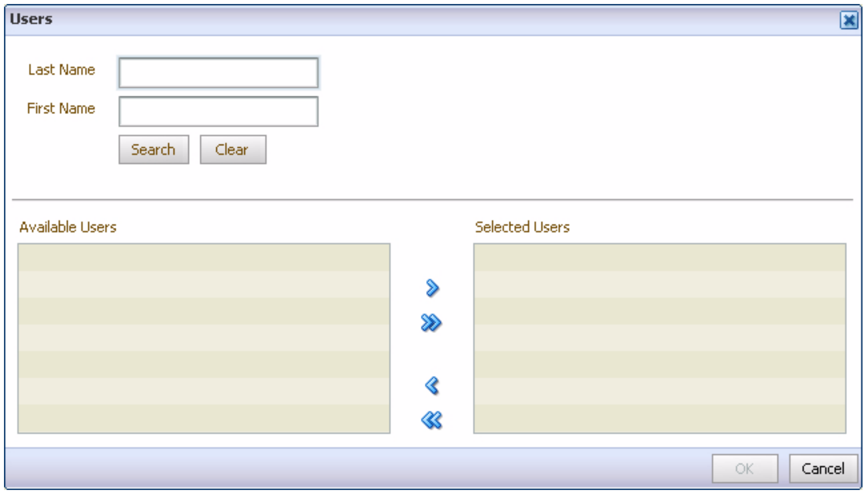
Figure 7–2 Task Details Window



4. **Name**—enter a name for the task.
5. **Description**—enter a description of the task.
6. **Priority**—select a priority for the task.
7. If the task is an approval task, select Approval Task checkbox.
8. **Planned Date Start**—enter when the task should begin.

9. **Planned Date End**—enter when the task should be completed by.
10. **Notes**—enter additional descriptive or instructive information.
11. **Assignments**—assign the task to users.
    a. Click **Edit** from the Assignments table. The Users Search window opens.

Figure 7–3 Users Search Window



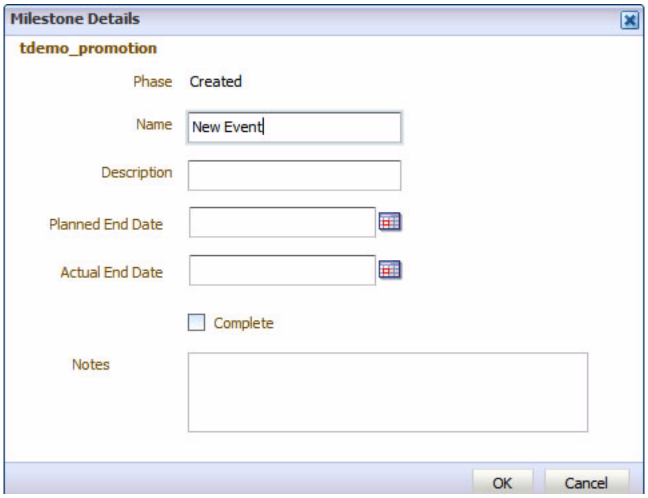
    b. Enter search criteria.
       – **Last Name**—enter all or part of a last name.
       – **First Name**—enter all or part of a first name.
    c. Click **Search**. The users matching the search criteria appear in the Available Users list.
    d. Select the necessary subsets from the Available list.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

Adding a Milestone

To add a milestone to the workflow:

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

Figure 7–4 Milestone Details Window



3. **Name**—enter a name for the milestone.
4. **Description**—enter a description of the milestone.
5. **Planned End Date**—enter a date when the milestone should be achieved by.
6. **Actual End Date**—select Complete or enter the actual end date.
7. **Notes**—enter additional information.
8. Click **OK**. The Milestone is added to the workflow.

Removing Tasks or Milestones

To remove a task or milestone from the workflow:

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

> **Note:** Phases cannot be deleted.

Starting Phases or Tasks

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

> **Note:** Phases and tasks can also be started or completed by highlighting the row and clicking the Start or Complete buttons, which automatically fills in the start or end date with the current date.

To start a phase or task:

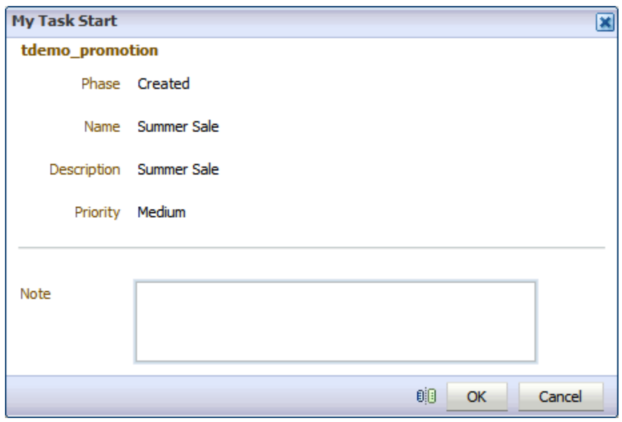
1. Click the name of the phase or task in the Name column. The Details window opens.
2. **Actual Date Start**—enter a date.
3. Click **OK**.

To begin a task assigned to you:

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

> **Note:** The My Task Start window only appears when the task is not an approval task and is assigned to the current user. If the task is an approval task or the current user is the task creator, the start date is filled in automatically (without this window appearing).

Figure 7–5 My Task Start Window



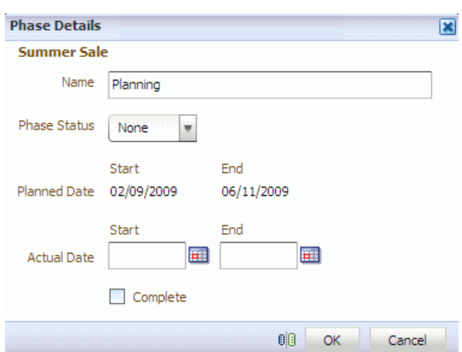
3. Click **OK**. The status of the task changes to Started.

Editing Phase Details

To edit phase details:

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

Figure 7–6 Phase Details Window



2. **Name**—change the name of the phase.
3. **Phase Status**—select the phase status.

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

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4. **Actual Start Date**—enter the Actual Start Date, if the phase has started.
5. **Actual End Date**—enter the Actual End Date. Select Complete if the phase is done.

Completing Phases, Tasks, or Milestones

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

Completing a Phase or Task

To complete a phase or task:

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

Completing an Assigned Task

To complete an assigned task:

1. Select the task from the Workflow window.
2. Click **Complete**. The My Task Complete window opens.

Note: The My Task Complete window only appears when the task is not an approval task and is assigned to the current user. If the task is an approval task or the current user is the task creator, the end date is filled in automatically (without this window appearing).

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3. **Note**—enter notes.
4. Click **OK**.

Completing Milestones

To complete a milestone:

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

Un–Starting a Task

To un–start or un–complete a task or assignment, complete the following steps:

1. From the My Tasks Status column of the Workflow tab window, select one of your assigned tasks. The My Task Status window opens.
   - Alternatively, if you have the appropriate user permissions, you can select the name of the Task from the Workflow tab. Next, select the Status link next to your name within the Assignments column. The Task Status window opens.
2. In **Actual Start Date** field, highlight date. Press the DELETE button on your keyboard to delete the entry.
3. Click Ok. The status of the task is returned to Not Started.

Un–Starting an Approval Task

If one of your assigned tasks is an approval task that has already been approved, you have the option of changing the status of that task back to "Pending Approval". To un–approved an approved task, complete the following steps:

1. From the My Tasks Status column of the Workflow tab, select one of your assigned tasks. The My Task Status window opens as follows:
2. Select **Pending Approval**. Click **Ok**.

Approving and Denying Tasks

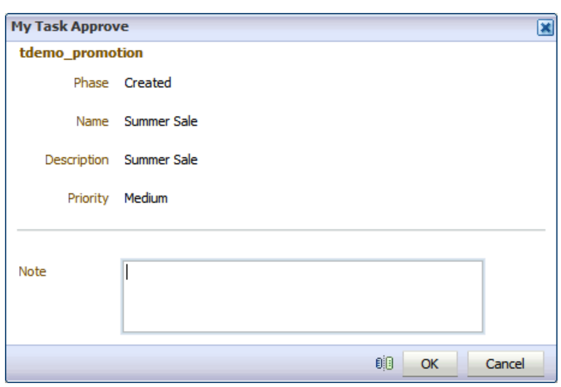
Approval tasks are those that require the approval of users with assignments on the task.

Approving a Task

To approve a task:

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

Figure 7–7 My Task Approve Window



3. **Note**—enter notes.
4. Click **OK**.

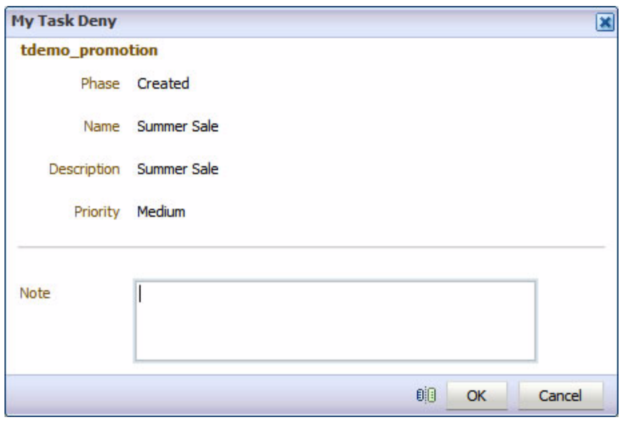
5. The status of the task changes to Complete with the current date appearing in the Start and End fields. If there is more than one assigned user on a task, the status will change to Complete after the last user has approved the task.

Denying Tasks

To deny a task:

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

Figure 7–8 My Task Approval Window



3. **Note**—enter notes.
4. Click **OK**. The Task Details window will display a status of Denied in the Assignments section.

A

Performance Metrics

This appendix provides additional details regarding the performance metrics that are available within Promotion Planning and Optimization.

The following metrics are provided:

Categories—Individual Category Metrics

The Categories Tab of the Promotion Manager lists all assigned Categories for a given promotion. The metrics displayed for individual categories are available in Table A–1, " Categories—Individual Category Performance Metrics".

Table A–1 Categories—Individual Category Performance Metrics

Metric	Definition
Target	User entered. This value is entered by the user at the time categories are allocated to the promotion.
Actual	(number of positions assigned this category/total number of positions) * 100.
ROI	Incremental Margin / Promotion Budget * 100, where Promotion Budget is calculated differently for all metrics.

Table A–1 (Cont.) Categories—Individual Category Performance Metrics

Metric	Definition
Lift%	(Incremental Units / Base Units) * 100.
Margin Lift%	((Incremental Margin - Base Margin) / Base Margin) * 100.
Sales Lift%	((Incremental Sales - Base Sales) / Base Sales) * 100.
Base Units/Store	Average Base Units sold per store.
Incr Units/Store	(Total Units/Store) - (Base Units/Store).
Tot Units/Store	Average Total Units sold per store.
Base Units	Sum of Base Units for all offers in positions assigned this category.
Incr Units	Sum of Incremental Units for all offers in positions assigned this category.
Tot Units	Sum of Total Units for all offers in positions assigned this category.
Base Sales	Sum of Base Sales for all offers in positions assigned this category.
Incr Sales	Sum of Incremental Sales for all offers in positions assigned this category.
Tot Sales	Sum of Total Sales for all offers in positions assigned this category.
Base Margin	Sum of Base Margin for all offers in positions assigned this category.
Incr Margin	Sum of Incremental Margin for all offers in positions assigned this category.
Tot Margin	Sum or Total Margin for all offers in positions assigned this category.
Aff Base Units	Sum of Affinity Base Units for all offers in positions assigned this category.
Aff Incr Units	Sum of Affinity Incremental Units for all offers in positions assigned this category.
Aff Base Sales	Sum of Affinity Base Sales for all offers in positions assigned this category.
Aff Incr Sales	Sum of Affinity Incremental Sales for all offers in positions assigned this category.
Aff Total Sales	Sum of Affinity Total Sales for all offers in positions assigned this category.
Aff Base Margin	Sum of Affinity Base Margin for all offers in positions assigned this category.
Aff Incr Margin	Sum of Affinity Incremental Margin for all offers in positions assigned this category.
Aff Tot Margin	Sum of Affinity Total Margin for all offers in positions assigned this category.
Net Incr Sales	Affinity Incremental Sales + Incremental Sales for this category.
Net Incr Margin	Affinity Incremental Margin + Incremental Margin of positions for this category.
Net Base Gross Margin	(Net Base Margin / Net Base Sales) * 100.

Table A–1 (Cont.) Categories—Individual Category Performance Metrics

Metric	Definition
Net Incr Gross Margin	(Net Incr Margin / Net Incr Sales) * 100.
Net Total Gross Margin	(Net Total margin / Net Total Sales) * 100.
Base Gross Margin	(Base Margin / Base Sales) * 100.
Incr Gross Margin	(Incr Margin / Incr Sales) * 100.
Aff Base Gross Margin	(Aff Base Margin/Aff Base Sales) * 100.
Total Gross Margin	(Total margin / Total Sales) * 100.
Aff Incr Gross Margin	(Aff Incr Margin/Aff Incr Sales) * 100.
Aff Total Gross Margin	(Aff Total Margin/Aff Total Sales) * 100.
Net Incr Units	(Incr Units + Aff Incr Units).
Net Total Units	(Total Units + Aff Total Units).
Net Base Sales	(Base Sales + Aff Base Sales).
Net Base Margin	(Base Margin + Aff Base Margin).
Net Base Units	(Base Units + Aff Base Units).
Net Total Sales	(Total Sales + Aff Total Sales).
Net Total Margin	(Total Margin + Aff Total Margin).

Categories—Total Category Performance Metrics

The Categories Tab of the Promotion Manager lists all assigned Categories for a given promotion. The metrics for total category performance are displayed in Table A–2, " Categories—Total Category Performance Metrics".

Table A–2 Categories—Total Category Performance Metrics

Metric	Definition
Target	User entered. This value is entered by the user at the time categories are allocated to the promotion.
Actual	(number of positions assigned this category/total number of positions) * 100.
ROI	Incremental Margin / Promotion Budget * 100, where Promotion Budget is calculated differently for all metrics.
Lift%	(Incremental Units / Base Units) * 100.
Margin Lift%	((Incremental Margin - Base Margin) / Base Margin) * 100.
Sales Lift&	((Incremental Sales - Base Sales) / Base Sales) * 100.
Base Units/Store	Average number of base units sold per store.
Incr Units/Store	(Total Units/Store) - (Base Units/Store).
Tot Units/Store	Average number of total units sold per store.
Base Units	Sum of Base Units for all categories.
Incr Units	Sum of Incremental Units for all categories.
Tot Units	Sum of Total Units for all categories.
Base Sales	Sum of Base Sales for all categories.

Table A–2 (Cont.) Categories—Total Category Performance Metrics

Metric	Definition
Incr Sales	Sum of Incremental Sales for all categories.
Tot Sales	Sum of Total Sales for all categories.
Base Margin	Sum of Base Margin for all categories.
Incr Margin	Sum of Incremental Margin for all categories.
Tot Margin	Sum or Total Margin for all categories.
Aff Base Units	Sum of Affinity Base Units for all categories.
Aff Incr Units	Sum of Affinity Incremental Units for all categories.
Aff Base Sales	Sum of Affinity Base Sales for all categories.
Aff Incr Sales	Sum of Affinity Incremental Sales for all categories.
Aff Total Sales	Sum of Affinity Total Sales for all categories.
Aff Base Margin	Sum of Affinity Base Margin for all categories.
Aff Incr Margin	Sum of Affinity Incremental Margin for all categories.
Aff Tot Margin	Sum of Affinity Total Margin for all categories.
Net Incr Sales	Affinity Incremental Sales + Incremental Sales.
Net Incr Margin	Affinity Incremental Margin + Incremental Margin.
Net Base Gross Margin	(Net Base Margin / Net Base Sales) * 100.
Net Incr Gross Margin	(Net Incr Margin / Net Incr Sales) * 100.
Net Total Gross Margin	(Net Total margin / Net Total Sales) * 100.
Base Gross Margin	(Base Margin / Base Sales) * 100.
Incr Gross Margin	(Incr Margin / Incr Sales) * 100.
Aff Base Gross Margin	(Aff Base Margin/Aff Base Sales) * 100.
Total Gross Margin	(Total margin / Total Sales) * 100.
Aff Incr Gross Margin	(Aff Incr Margin/Aff Incr Sales) * 100.
Aff Total Gross Margin	(Aff Total Margin/Aff Total Sales) * 100.
Net Incr Units	(Incr Units + Aff Incr Units).
Net Total Units	(Total Units + Aff Total Units).
Net Base Sales	(Base Sales + Aff Base Sales).
Net Base Margin	(Base Margin + Aff Base Margin).
Net Base Units	(Base Units + Aff Base Units).
Net Total Sales	(Total Sales + Aff Total Sales).
Net Total Margin	(Total Margin + Aff Total Margin).

Offers—Individual Offer Performance

The Offers Tab of the Promotion Manager lists all offers for a given promotion. Individual offer metrics are available in Table A–3, " Offers Tab—Individual Offer Details and Metric Definitions".

Table A–3 Offers Tab—Individual Offer Details and Metric Definitions

Metric	Definition
Value Index	A score of the promotion effectiveness of an offer based on the performance of ad items. It provides a weighted value that takes the incremental lift of revenue, profit, and units of the ad item into consideration. The weightings are configurable.
Aff Value Index	A score of the promotion effectiveness of an offer based on the performance of affinity items. It provides a weighted value that takes the incremental lift of revenue, profit, and units of the affinity items into consideration. The weightings are configurable.
Total Value Index	A score of the overall promotion effectiveness of an offer based on the performance of ad items and affinity items. It is the sum of the Value Index and the Aff Value Index (minus the Value Index Offset).
ROI	Incremental Margin / Promotion Budget * 100, where Promotion Budget is calculated differently for all metrics.
Lift%	(Incremental Units / Base Units) * 100.
Margin Lift%	((Incremental Margin - Base Margin) / Base Margin) * 100.
Sales Lift%	((Incremental Sales - Base Sales) / Base Sales) * 100.
Base Units/Store	Average number of base units sold per store.
Incr Units/Store	(Total Units/Store) - (Base Units/Store).
Tot Units/Store	Average number of total units sold per store.
Avg Base Units/Store	Average Base Units for all items per store.
Avg Incr Units/Store	Average Incremental Units per store.
Avg Total Units/Store	Average Total Units for all items per store.
Base Units	Sum of Base Units for all items in the offer.
Incr Units	Sum of Incremental Units for all items in the offer.
Tot Units	Sum of Total Units for all items in the offer.
Base Sales	Sum of Base Sales for all items in the offer.
Incr Sales	Sum of Incremental Sales for all items in the offer.
Tot Sales	Sum of Total Sales for all items in the offer.
Base Margin	Sum of Base Margin for all items in the offer.
Incr Margin	Sum of Incremental Margin for all items in the offer.
Tot Margin	Sum or Total Margin for all items in the offer.
Aff Base Units	Sum of Affinity Base Units for all items in the offer.
Aff Incr Units	Sum of Affinity Incremental Units for all items in the offer.
Aff Tot Units	Sum of Affinity Total Units for all items in the offer.
Aff Base Sales	Sum of Affinity Base Sales for all items in the offer.

Table A–3 (Cont.) Offers Tab—Individual Offer Details and Metric Definitions

Metric	Definition
Aff Incr Sales	Sum of Affinity Incremental Sales for all items in the offer.
Aff Total Sales	Sum of Affinity Total Sales for all items in the offer.
Aff Base Margin	Sum of Affinity Base Margin for all items in the offer.
Aff Incr Margin	Sum of Affinity Incremental Margin for all items in the offer.
Aff Tot Margin	Sum of Affinity Total Margin for all items in the offer.
Net Incr Sales	Affinity Incremental Sales + Incremental Sales.
Net Incr Margin	Affinity Incremental Margin + Incremental Margin.
Net Base Gross Margin	(Base Margin / Base Sales) * 100.
Net Incr Gross Margin	(Incr Margin / Incr Sales) * 100.
Net Total Gross Margin	(Total margin / Total Sales) * 100.
Base Gross Margin	(Net Base Gross Margin + Aff Base Gross Margin).
Incr Gross Margin	(Net Incr Gross Margin + Aff Incr Gross Margin).
Aff Base Gross Margin	(Aff Base Margin/Aff Base Sales) * 100.
Total Gross Margin	(Net Total Gross Margin + Aff Total Gross Margin).
Aff Total Gross Margin	(Aff Total Margin/Aff Total Sales) * 100.
Net Incr Units	(Incr Units + Aff Incr Units).
Aff Incr Gross Margin	(Aff Incr Margin/Aff Incr Sales) * 100.
Net Total Units	(Total Units + Aff Total Units).
Net Base Sales	(Base Sales + Aff Base Sales).
Net Base Margin	(Base Margin + Aff Base Margin).
Net Base Units	(Base Units + Aff Base Units).
Net Total Sales	(Total Sales + Aff Total Sales).
Net Total Margin	(Total Margin + Aff Total Margin).

Offers—Total Offer Performance

In addition to displaying metrics for all individual offers, the Offers Tab also displays Total Offer Performance for all Offers in a promotion. Total offer performance metrics are displayed in Table A–4, " Offers Tab—Individual Offer Details and Metric Definitions".

Table A–4 Offers Tab—Individual Offer Details and Metric Definitions

Metric	Definition
ROI	Incremental Margin / Promotion Budget * 100, where Promotion Budget is calculated differently for all metrics.
Lift%	(Incremental Units / Base Units) * 100.
Margin Lift%	((Incremental Margin - Base Margin) / Base Margin) * 100.
Sales Lift%	((Incremental Sales - Base Sales) / Base Sales) * 100.
Base Units/Store	Average number of base units sold per store.
Incr Units/Store	(Total Units/Store) - (Base Units/Store).

Table A–4 (Cont.) Offers Tab—Individual Offer Details and Metric Definitions

Metric	Definition
Tot Units/Store	Average number of total units sold per store.
Avg Base Units/Store	Average Base Units for all items per store.
Avg Incr Units/Store	Average Incremental Units per store.
Avg Total Units/Store	Average Total Units for all items per store.
Base Units	Sum of Base Units for all items in the offer.
Incr Units	Sum of Incremental Units for all items in the offer.
Tot Units	Sum of Total Units for all items in the offer.
Base Sales	Sum of Base Sales for all items in the offer.
Incr Sales	Sum of Incremental Sales for all items in the offer.
Tot Sales	Sum of Total Sales for all items in the offer.
Base Margin	Sum of Base Margin for all items in the offer.
Incr Margin	Sum of Incremental Margin for all items in the offer.
Tot Margin	Sum or Total Margin for all items in the offer.
Aff Base Units	Sum of Affinity Base Units for all items in the offer.
Aff Incr Units	Sum of Affinity Incremental Units for all items in the offer.
Aff Tot Units	Sum of Affinity Total Units for all items in the offer.
Aff Base Sales	Sum of Affinity Base Sales for all items in the offer.
Aff Incr Sales	Sum of Affinity Incremental Sales for all items in the offer.
Aff Total Sales	Sum of Affinity Total Sales for all items in the offer.
Aff Base Margin	Sum of Affinity Base Margin for all items in the offer.
Aff Incr Margin	Sum of Affinity Incremental Margin for all items in the offer.
Aff Tot Margin	Sum of Affinity Total Margin for all items in the offer.
Net Incr Sales	Affinity Incremental Sales + Incremental Sales.
Net Incr Margin	Affinity Incremental Margin + Incremental Margin.
Net Base Gross Margin	(Net Base Margin / Net Base Sales) * 100.
Net Incr Gross Margin	(Net Incr Margin / Net Incr Sales) * 100.
Net Total Gross Margin	(Net Total margin / Net Total Sales) * 100.
Base Gross Margin	(Base Margin / Base Sales) * 100.
Incr Gross Margin	(Incr Margin / Incr Sales) * 100.
Aff Base Gross Margin	(Aff Base Margin/Aff Base Sales) * 100.
Total Gross Margin	(Total margin / Total Sales) * 100.
Aff Incr Gross Margin	(Aff Incr Margin/Aff Incr Sales) * 100.
Aff Incr Gross Margin	(Aff Incr Margin/Aff Incr Sales) * 100.
Aff Incr Gross Margin	(Aff Incr Margin/Aff Incr Sales) * 100.
Net Incr Units	(Incr Units + Aff Incr Units).
Aff Incr Gross Margin	(Aff Incr Margin/Aff Incr Sales) * 100.
Net Total Units	(Total Units + Aff Total Units).

Table A–4 (Cont.) Offers Tab—Individual Offer Details and Metric Definitions

Metric	Definition
Net Base Sales	(Base Sales + Aff Base Sales).
Net Base Margin	(Base Margin + Aff Base Margin).
Net Base Units	(Base Units + Aff Base Units).
Net Total Sales	(Total Sales + Aff Total Sales).
Net Total Margin	(Total Margin + Aff Total Margin).
Value Index	A score of the promotion effectiveness of an offer based on the performance of ad items. It provides a weighted value that takes the incremental lift of revenue, profit, and units of the ad item into consideration. The weightings are configurable.
Affinity Value Index	A score of the promotion effectiveness of an offer based on the performance of affinity items. It provides a weighted value that takes the incremental lift of revenue, profit, and units of the affinity items into consideration. The weightings are configurable.
Total Value Index	A score of the overall promotion effectiveness of an offer based on the performance of ad items and affinity items. It is the sum of the Value Index and the Aff Value Index (minus the Value Index Offset).

Offers—Offer Details Window—Get or Buy SKU View

When an offer is opened from the Offers tab of the Promotion Manager, the Offer Details window is used to display details related to the offer. For offers of the Buy One Get One type, performance metrics are displayed for that offer when using either Buy SKU view or Get SKU view. SKU related metrics are available in Table A–5, " Offer Details Window—Offer Definition Tab—Get or Buy SKU View Performance Metrics".

Table A–5 Offer Details Window—Offer Definition Tab—Get or Buy SKU View Performance Metrics

Metric	Definition
Item ID	Item ID number.
Name	Name of the item.
Supplier ID	Supplier ID number.
Supplier Name	Name of the supplier.
Item Cost	Purchase price of the item.
Item Price	Regular retail price.
Ad Price	Price based on the corresponding offer discount.
Savings	Item Price - Ad Price.
Avg Ticket Price	Average Item Price
Avg Ad Price	Average Ad Price
Avg Selling Price	Avg Item Price
Avg Selling Cost	The average of an item’s Actual Cost during the specified baseline period.
Effective Sav%	Percent of price reduction based on Item Price and the corresponding offer type.

Table A–5 (Cont.) Offer Details Window—Offer Definition Tab—Get or Buy SKU View Performance Metrics

Metric	Definition
Forecast Status	Status of the forecast.
Stores Forecasted	The number of forecasted stores.
Confidence	Level of confidence in the system generated forecast metrics. See Forecast Confidence Indicator on page 5-21.
ROI	Incremental Margin / Promotion Budget * 100, where Promotion Budget is calculated differently for all metrics.
Lift%	(Incremental Units / Base Units) * 100.
Margin Lift%	((Incremental Margin - Base Margin) / Base Margin) * 100.
Sales Lift%	((Incremental Sales - Base Sales) / Base Sales) * 100.
Base Units/Store	Average number of base units sold per store.
Incr Units/Store	(Total Units/Store) - (Base Units/Store).
Tot Units/Store	Average number of total units sold per store.
Base Units	Sum of Base Units for all items in the list shown.
Incr Units	Sum of Incremental Units for all items in the list shown.
Tot Units	Sum of Total Units for all items in the list shown.
Base Sales	Sum of Base Sales for all items in the list shown.
Incr Sales	Sum of Incremental Sales for all items in the list shown.
Tot Sales	Sum of Total Sales for all items in the list shown.
Base Margin	Sum of Base Margin for all items in the list shown.
Incr Margin	Sum of Incremental Margin for all items in the list shown.
Tot Margin	Sum of Total Margin for all items in the list shown.
Aff Base Units	Sum of Affinity Base Units for all items in the list shown.
Aff Incr Units	Sum of Affinity Incremental Units for all items in the list shown.
Aff Tot Units	Sum of Affinity Total Units for all items in the list shown.
Aff Base Sales	Sum of Affinity Base Sales for all items in the list shown.
Aff Incr Sales	Sum of Affinity Incremental Sales for all items in the list shown.
Aff Total Sales	Sum of Affinity Total Sales for all items in the list shown.
Aff Base Margin	Sum of Affinity Base Margin for all items in the list shown.
Aff Incr Margin	Sum of Affinity Incremental Margin for all items in the list shown.
Aff Tot Margin	Sum of Affinity Total Margin for all items in the list shown.
Net Incr Units	Affinity Incremental Units + Incremental Units.
Net Incr Sales	Affinity Incremental Sales + Incremental Sales
Net Incr Margin	Affinity Incremental Margin + Incremental Margin
Aff Base Gross Margin	(Aff Base Margin/Aff Base Sales) * 100.
Aff Incr Gross Margin	(Aff Incr Margin/Aff Incr Sales) * 100.
Aff Total Gross Margin	(Aff Total Margin/Aff Total Sales) * 100.
Net Base Gross Margin	(Net Base Margin / Net Base Sales) * 100.

Table A–5 (Cont.) Offer Details Window—Offer Definition Tab—Get or Buy SKU View Performance Metrics

Metric	Definition
Net Incr Gross Margin	(Net Incr Margin / Net Incr Sales) * 100.
Net Total Gross Margin	(Net Total margin / Net Total Sales) * 100.
Base Gross Margin	(Base Margin / Base Sales) * 100.
Incr Gross Margin	(Incr Margin / Incr Sales) * 100.
Total Gross Margin	(Total margin / Total Sales) * 100.

The Vertical Tab—Promotion Performance Metrics

Promotion performance metrics are available from the Vertical Tab. Promotion performance metrics are listed in Table A–6, " Vertical Tab—Promotion Performance Metrics".

Table A–6 Vertical Tab—Promotion Performance Metrics

Metric	Definition
Forecast Status	Status of the Forecast. Possible outcomes are as follows: Not forecasted, Current, Partial, Unable to Forecast, Out of Date, Failed, Expired, Excluded, No Baseline, No Model, No Prediction, and Error. For detailed definitions of these statuses, refer to Forecast Statuses on page 5-51 in Chapter 5, "Promotions".
Offers Forecasted	The percentage of forecasted offers.
ROI	Incremental Margin / Promotion Budget * 100, where Promotion Budget is calculated differently for all metrics.
Lift%	(Incremental Units / Base Units) * 100.
Base Units/Store	Average number of base units sold per store.
Incr Units/Store	(Total Units/Store) - (Base Units/Store).
Tot Units/Store	Average number of total units sold per store.
Base Units	Sum of Base Units for all offers.
Incr Units	Sum of Incremental Units for all offers.
Tot Units	Sum of Total Units for all offers.
Base Sales	Sum of Base Sales for all offers.
Incr Sales	Sum of Incremental Sales for all offers.
Tot Sales	Sum of Total Sales for all offers.
Base Margin	Sum of Base Margin for all positioned offers.
Incr Margin	Sum of Incremental Margin for all offers.
Tot Margin	Sum or Total Margin for all offers.
Aff Base Units	Sum of Affinity Base Units for all offers.
Aff Incr Units	Sum of Affinity Incremental Units for all offers.
Aff Total Units	Sum of Affinity Total Units for all locations.
Aff Base Sales	Sum of Affinity Base Sales for all offers.
Aff Incr Sales	Sum of Affinity Incremental Sales for all offers.

Table A–6 (Cont.) Vertical Tab—Promotion Performance Metrics

Metric	Definition
Aff Total Sales	Sum of Affinity Total Sales for all offers.
Aff Base Margin	Sum of Affinity Base Margin for all offers.
Aff Incr Margin	Sum of Affinity Incremental Margin for all offers.
Aff Tot Margin	Sum of Affinity Total Margin for all offers.
Net Incr Units	Affinity Incremental Units + Incremental Units.
Net Incr Sales	Affinity Incremental Sales + Incremental Sales.
Net Incr Margin	Affinity Incremental Margin + Incremental Margin.
#Offers	Total number of offers.
High Confidence Offers%	Percentage of offers with a high confidence forecast.
Medium Confidence Offers%	Percentage of offers with a medium confidence forecast.
Low Confidence Offers%	Percentage of offers with a low confidence forecast.
No Confidence Offers%	Percentage of offers with a no confidence forecast.
User—High Confidence Offers%	Percentage of offers with a high confidence, system forecast that also have user overridden metrics.
User—Medium Confidence Offers%	Percentage of offers with a medium confidence, system forecast that also have user overridden metrics.
User—Low Confidence Offers%	Percentage of offers with a low confidence, system forecast that also have user overridden metrics.
User—No Confidence Offers%	Percentage of offers with a no confidence, system forecast that also have user overridden metrics.
Margin Lift%	((Incremental Margin - Base Margin) / Base Margin) * 100.
Sales Lift%	((Incremental Sales - Base Sales) / Base Sales) * 100.
Aff Base Gross Margin	(Aff Base Margin/Aff Base Sales) * 100.
Aff Incr Gross Margin	(Aff Incr Margin/Aff Incr Sales) * 100.
Aff Total Gross Margin	(Aff Total Margin/Aff Total Sales) * 100.
Net Base Gross Margin	(Net Base Margin / Net Base Sales) * 100.
Net Incr Gross Margin	(Net Incr Margin / Net Incr Sales) * 100.
Net Total Gross Margin	(Net Total margin / Net Total Sales) * 100.
Base Gross Margin	(Base Margin / Base Sales) * 100.
Incr Gross Margin	(Incr Margin / Incr Sales) * 100.
Total Gross Margin	(Total margin / Total Sales) * 100.

Vehicle Design—List View—All Pages View

Using List View for All Pages within the Vehicle Design tab, you will see the following metrics. Table A–7, " Vehicle Design—List View—All Pages" provides more detail.

Table A–7 Vehicle Design—List View—All Pages

Metric	Definition
ROI	Incremental Margin / Promotion Budget * 100, where Promotion Budget is calculated differently for all metrics.
Lift%	(Incremental Units / Base Units) * 100.
Margin Lift%	((Incremental Margin - Base Margin) / Base Margin) * 100.
Sales Lift%	((Incremental Sales - Base Sales) / Base Sales) * 100.
Base Units/Store	Average number of base units sold per store.
Incr Units/Store	(Total Units/Store) - (Base Units/Store).
Tot Units/Store	Average number of total units sold per store.
Base Units	Sum of Base Units for all items in the offer.
Incr Units	Sum of Incremental Units for all items
Tot Units	Sum of Total Units for all items in the offer.
Base Sales	Sum of Base Sales for all positioned offers on all pages.
Incr Sales	Sum of Incr Sales for all positioned offers on all pages.
Total Sales	Sum of Total Sales for all positioned offers on all pages.
Base Margin	Sum of Base Margin for all positioned offers on all pages.
Incr Margin	Sum of Incremental Margin for all positioned offers on all pages.
Tot Margin	Sum of Total Margin for all positioned offers on all pages.
Aff Base Units	Sum of Affinity Base Units for all items in the offer.
Aff Incr Units	Sum of Affinity Incremental Units for all items in the offer.
Aff Tot Units	Sum of Affinity Total Units for all items in the offer.
Aff Base Sales	Sum of Affinity Base Sales for all items in the offer.
Aff Incr Sales	Sum of Affinity Incremental Sales for all items in the offer.
Aff Tot Sales	Sum of Affinity Total Sales for all items in the offer.
Aff Base Margin	Sum of Affinity Base Margin for all items in the offer.
Aff Incr Margin	Sum of Affinity Incremental Margin for all items in the offer.
Aff Tot Margin	Sum of Affinity Total Margin for all items in the offer.
Net Incr Units	Affinity Incremental Units + Incremental Units.
Net Incr Sales	Affinity Incremental Sales + Incremental Sales.
Net Incr Margin	Affinity Incremental Margin + Incremental Margin.
Aff Base Gross Margin	(Aff Base Margin/Aff Base Sales) * 100.
Aff Incr Gross Margin	(Aff Incr Margin/Aff Incr Sales) * 100.
Aff Total Gross Margin	(Aff Total Margin/Aff Total Sales) * 100.
Net Base Gross Margin	(Net Base Margin / Net Base Sales) * 100.
Net Incr Gross Margin	(Net Incr Margin / Net Incr Sales) * 100.

Table A–7 (Cont.) Vehicle Design—List View—All Pages

Metric	Definition
Net Total Gross Margin	(Net Total margin / Net Total Sales) * 100.
Base Gross Margin	(Base Margin / Base Sales) * 100.
Incr Gross Margin	(Incr Margin / Incr Sales) * 100.
Total Gross Margin	(Total margin / Total Sales) * 100.

Vehicle Design—Layout View—All Pages—Individual Page Mouseover

If you use Layout View for All Pages within the Vehicle Design window, you have the option of hovering your mouse over an individual page and seeing metrics for those pages. Table A–8, " Vehicle Design—Layout View—All Pages—Individual Page Mouseover" provides more detail.

Table A–8 Vehicle Design—Layout View—All Pages—Individual Page Mouseover

Metric	Definition
ROI	Incremental Margin / Promotion Budget * 100, where Promotion Budget is calculated differently for all metrics.
Lift%	(Incremental Units / Base Units) * 100.
Margin Lift%	((Incremental Margin - Base Margin) / Base Margin) * 100.
Sales Lift%	((Incremental Sales - Base Sales) / Base Sales) * 100.
Base Sales	Sum of Base Sales for all positioned offers on the page.
Incr Sales	Sum of Incremental Sales for all positioned offers on the page.
Tot Sales	Sum of Total Sales for all positioned offers on the page.
Base Margin	Sum of Base Margin for all positioned offers on the page.
Incr Margin	Sum of Incremental Margin for all positioned offers on the page.
Tot Margin	Sum of Total Margin for all positioned offers on the page.
Base Units	Sum of Base Units for all items in the offer.
Incr Units	Sum of Incremental Units for all items in the offer.
Tot Units	Sum of Total Units for all items in the offer.

Vehicle Design—List View—Single Page Metrics

Single page metrics are available when using list view within the Vehicle Designer. Table A–9, " Vehicle Design—List View—Single Page Metrics" provides more detail.

Table A–9 Vehicle Design—List View—Single Page Metrics

Metric	Definition
ROI	Incremental Margin / Promotion Budget * 100, where Promotion Budget is calculated differently for all metrics.
Lift%	(Incremental Units / Base Units) * 100.
Margin Lift%	((Incremental Margin - Base Margin) / Base Margin) * 100.
Sales Lift%	((Incremental Sales - Base Sales) / Base Sales) * 100.
Base Units/Store	Average number of base units sold per store.

Table A–9 (Cont.) Vehicle Design—List View—Single Page Metrics

Metric	Definition
Incr Units/Store	(Total Units/Store) - (Base Units/Store).
Tot Units/Store	Average Total Units sold per store.
Base Units	Sum of Base Units for all positioned offers on the position.
Incr Units	Sum of Incremental Units for all positioned offers on the position.
Tot Units	Sum of Total Units for all positioned offers on the position.
Base Sales	Sales (or predicted sales) generated by the focus item during the baseline period.
Incr Sales	Sum of Incremental Sales.
Tot Sales	Sum of Total Sales.
Base Margin	Sum of Base Margin.
Incr Margin	Sum of Incremental Margin.
Tot Margin	Sum of Total Margin.
Aff Base Units	Sum of Affinity Base Units.
Aff Incr Units	Sum of Affinity Incremental Units.
Aff Tot Units	Sum of Affinity Total Units.
Aff Base Sales	Sum of Affinity Base Sales.
Aff Incr Sales	Sum of Affinity Incremental Sales.
Aff Tot Sales	Sum of Affinity Total Sales.
Aff Base Margin	Sum of Affinity Base Margin for all positioned offers on the position.
Aff Incr Margin	Sum of Affinity Incremental Margin.
Aff Tot Margin	Sum of Affinity Total Margin.
Net Incr Units	Affinity Incremental Units + Incremental Units.
Net Incr Sales	Affinity Incremental Sales + Incremental Sales.
Net Incr Margin	Affinity Incremental Margin + Incremental Margin.
Aff Base Gross Margin	(Aff Base Margin/Aff Base Sales) * 100.
Aff Incr Gross Margin	(Aff Incr Margin/Aff Incr Sales) * 100.
Aff Total Gross Margin	(Aff Total Margin/Aff Total Sales) * 100.
Net Base Gross Margin	(Base Margin / Base Sales) * 100.
Net Incr Gross Margin	(Incr Margin / Incr Sales) * 100.
Net Total Gross Margin	(Total margin / Total Sales) * 100.
Base Gross Margin	(Net Base Gross Margin + Aff Base Gross Margin).
Incr Gross Margin	(Net Incr Gross Margin + Aff Incr Gross Margin).
Total Gross Margin	(Net Total Gross Margin + Aff Total Gross Margin).
Budget	Budget for the vehicle.

Vehicle Design—Layout View—Single Page Metrics Page Mouseover

Single page metrics are available using layout view in the Vehicle Designer. Table A–10, " Vehicle Design—Layout View—Single Page Metrics Page Mouseover" provides more detail.

Table A–10 Vehicle Design—Layout View—Single Page Metrics Page Mouseover

Metric	Definition
ROI	Incremental Margin / Promotion Budget * 100, where Promotion Budget is calculated differently for all metrics.
Lift%	(Incremental Units / Base Units) * 100.
Margin Lift%	((Incremental Margin - Base Margin) / Base Margin) * 100.
Sales Lift%	((Incremental Sales - Base Sales) / Base Sales) * 100.
Base Sales	Sales (or predicted sales) generated by the focus item during the baseline period.
Incr Sales	Sum of Incremental Sales.
Tot Sales	Sum of Total Sales.
Base Margin	Sum of Base Margin.
Incr Margin	Sum of Incremental Margin.
Tot Margin	Sum of Total Margin.
Base Units	Sum of Base Units for all positioned offers on the position.
Incr Units	Sum of Incremental Units for all positioned offers on the position.
Tot Units	Sum of Total Units for all positioned offers on the position.

Performance & What–If Metrics

Metrics are available from the Performance & What–If tab of the Offer Details window. Table A–11, " Performance & What–If Metrics" provides more detail.

Table A–11 Performance & What–If Metrics

Metric	Definition
Forecast Status	The status of the forecast. See Forecast Statuses on page 5-51 for more information about the specific statuses.
Confidence	Level of confidence in the system generated forecast metrics. See Forecast Confidence Indicator on page 5-21.
SKUs Forecasted	The number of SKUs included in the forecast.
Value Index	A score of the promotion effectiveness of an offer based on the performance of ad items. It provides a weighted value that takes the incremental lift of revenue, profit, and units of the ad item into consideration. The weightings are configurable.
Aff Value Index	A score of the promotion effectiveness of an offer based on the performance of affinity items. It provides a weighted value that takes the incremental lift of revenue, profit, and units of the affinity items into consideration. The weightings are configurable.

Table A–11 (Cont.) Performance & What–If Metrics

Metric	Definition
Tot Value Index	A score of the overall promotion effectiveness of an offer based on the performance of ad items and affinity items. It is the sum of the Value Index and the Aff Value Index (minus the Value Index Offset).
ROI	Incremental Margin / Promotion Budget * 100, where Promotion Budget is calculated differently for all metrics.
Lift%	(Incremental Units / Base Units) * 100.
Margin Lift%	((Incremental Margin - Base Margin) / Base Margin) * 100.
Sales Lift%	((Incremental Sales - Base Sales) / Base Sales) * 100.
Avg Cost	Average cost of the items contained within the offer.
Avg Ad Price	Average ad price of the items contained within the offer.
Base Units/Store	Average number of base units sold per store.
Incr Units/Store	(Total Units/Store) - (Base Units/Store).
Tot Units/Store	Average Total Units sold per store.
Base Units	Sum of Base Units for all items in the offer.
Incr Units	Sum of Incremental Units for all items in the offer.
Tot Units	Sum of Total Units for all items in the offer.
Base Sales	Sales (or predicted sales) generated by the focus item during the baseline period.
Incr Sales	Sum of Incremental Sales.
Tot Sales	Sum of Total Sales.
Base Margin	Sum of Base Margin.
Incr Margin	Sum of Incremental Margin.
Tot Margin	Sum of Total Margin.
Aff Base Units	Sum of Affinity Base Units.
Aff Incr Units	Sum of Affinity Incremental Units.
Aff Base Sales	Sum of Affinity Base Sales.
Aff Incr Sales	Sum of Affinity Incremental Sales.
Aff Tot Sales	Sum of Affinity Total Sales.
Aff Base Margin	Sum of Affinity Base Margin for all items in the offer.
Aff Incr Margin	Sum of Affinity Incremental Margin.
Aff Tot Margin	Sum of Affinity Total Margin.
Net Incr Units	Affinity Incremental Units + Incremental Units.
Net Incr Sales	Affinity Incremental Sales + Incremental Sales.
Net Incr Margin	Affinity Incremental Margin + Incremental Margin.
Aff Base Gross Margin	(Aff Base Margin/Aff Base Sales) * 100.
Aff Incr Gross Margin	(Aff Incr Margin/Aff Incr Sales) * 100.
Aff Total Gross Margin	(Aff Total Margin/Aff Total Sales) * 100.
Net Base Gross Margin	(Base Margin / Base Sales) * 100.

Table A–11 (Cont.) Performance & What–If Metrics

Metric	Definition
Net Incr Gross Margin	(Incr Margin / Incr Sales) * 100.
Net Total Gross Margin	(Total margin / Total Sales) * 100.
Base Gross Margin	(Net Base Gross Margin + Aff Base Gross Margin).
Incr Gross Margin	(Net Incr Gross Margin + Aff Incr Gross Margin).
Total Gross Margin	(Net Total Gross Margin + Aff Total Gross Margin).
Net Base Sales	(Base Sales + Aff Base Sales).
Net Base Margin	(Base Margin + Aff Base Margin).
Net Base Units	(Base Units + Aff Base Units).
Net Total Sales	(Total Sales + Aff Total Sales).
Net Total Margin	(Total Margin + Aff Total Margin).
Net Total Units	(Total Units + Aff Total Units).

Vehicle Design—Position Detail Window—Offers Tab—Individual Offer Performance

Individual Offer performance information is available from the Offers tab of the Position Details window. Table A–12, " Vehicle Design—Position Detail Window—Offers Tab—Individual Offer Performance" provides more detail.

Table A–12 Vehicle Design—Position Detail Window—Offers Tab—Individual Offer Performance

Metric	Definition
Value Index	A score of the promotion effectiveness of an offer based on the performance of ad items. It provides a weighted value that takes the incremental lift of revenue, profit, and units of the ad item into consideration. The weightings are configurable.
Aff Value Index	A score of the promotion effectiveness of an offer based on the performance of affinity items. It provides a weighted value that takes the incremental lift of revenue, profit, and units of the affinity items into consideration. The weightings are configurable.
Tot Value Index	A score of the overall promotion effectiveness of an offer based on the performance of ad items and affinity items. It is the sum of the Value Index and the Aff Value Index (minus the Value Index Offset).
ROI	Incremental Margin / Promotion Budget * 100, where Promotion Budget is calculated differently for all metrics.
Lift%	(Incremental Units / Base Units) * 100.
Margin Lift%	((Incremental Margin - Base Margin) / Base Margin) * 100.
Sales Lift%	((Incremental Sales - Base Sales) / Base Sales) * 100.
Base Units/Store	Average number of base units sold per store.
Incr Units/Store	(Total Units/Store) - (Base Units/Store).
Tot Units/Store	Average number of total units sold per store.
Base Units	Sum of Base Units for all items in the offer.

Table A–12 (Cont.) Vehicle Design—Position Detail Window—Offers Tab—Individual Offer Performance

Metric	Definition
Incr Units	Sum of Incremental Units for all items in the offer.
Tot Units	Sum of Total Units for all items in the offer.
Base Sales	Sum of Base Sales for all items in the offer.
Incr Sales	Sum of Incremental Sales for all items in the offer.
Tot Sales	Sum of Total Sales for all items in the offer.
Base Margin	Sum of Base Margin for all items in the offer.
Incr Margin	Sum of Incremental Margin for all items in the offer.
Tot Margin	Sum of Total Margin for all items in the offer.
Aff Base Units	Sum of Affinity Base Units for all items in the offer.
Aff Incr Units	Sum of Affinity Incremental Units for all items in the offer.
Aff Tot Units	Sum of Affinity Total Units for all items in the offer.
Aff Base Sales	Sum of Affinity Base Sales for all items in the offer.
Aff Incr Sales	Sum of Affinity Incremental Sales for all items in the offer.
Aff Tot Sales	Sum of Affinity Total Sales for all items in the offer.
Aff Base Margin	Sum of Affinity Base Margin for all items in the offer.
Aff Incr Margin	Sum of Affinity Incremental Margin for all items in the offer.
Aff Tot Margin	Sum of Affinity Total Margin for all items in the offer.
Net Incr Units	Affinity Incremental Units + Incremental Units.
Net Incr Sales	Affinity Incremental Sales + Incremental Sales.
Net Incr Margin	Affinity Incremental Margin + Incremental Margin.
#SKUs	Number of SKUs in the offer.
Confidence	Level of confidence in the system generated forecast metrics. See Forecast Confidence Indicator on page 5-21.
SKUs Forecasted	The number of SKUs included in the forecast.
Offer	The name of the offer.
#Versions	The number of versions of the offer.
Deal Amount	The percentage or dollar amount of the deal.
Aff Base Gross Margin	(Aff Base Margin/Aff Base Sales) * 100.
Aff Incr Gross Margin	(Aff Incr Margin/Aff Incr Sales) * 100.
Aff Total Gross Margin	(Aff Total Margin/Aff Total Sales) * 100.
Net Base Gross Margin	(Base Margin / Base Sales) * 100.
Net Incr Gross Margin	(Incr Margin / Incr Sales) * 100.
Net Total Gross Margin	(Total margin / Total Sales) * 100.
Base Gross Margin	(Net Base Gross Margin + Aff Base Gross Margin).
Incr Gross Margin	(Net Incr Gross Margin + Aff Incr Gross Margin).
Total Gross Margin	(Net Total Gross Margin + Aff Total Gross Margin).
Net Total Units	(Total Units + Aff Total Units).

Table A–12 (Cont.) Vehicle Design—Position Detail Window—Offers Tab—Individual Offer Performance

Metric	Definition
Net Base Sales	(Base Sales + Aff Base Sales).
Net Base Margin	(Base Margin + Aff Base Margin).
Net Base Units	(Base Units + Aff Base Units).
Net Total Sales	(Total Sales + Aff Total Sales).
Net Total Margin	(Total Margin + Aff Total Margin).

Glossary

Affinity

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

Campaign

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

Cannibalization

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

Event

Activities relevant to the promotional calendar.

Forecast

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

Halo

The tendency for sales of complementary products that may rise because of the promotion.

Offer

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

Offer Versioning

Offer Versioning is the ability to define a set of locations or store subsets (as a subset of promotion versions) that an offer and its items (SKUs) will be featured in. This also includes the ability to override the discount, deal, price, and forecast per version.

Page Versioning

Page Versioning is the ability to define a set of locations or store subsets (as a subset of promotion versions) that a vehicle and its pages will be featured in. This also includes the ability to override the pages, positions (blocks), positioned categories (allocations), positioned offers (segments), and positioned offer attributes per version.

Promotion

Individual events or advertising you use to drive increased sales.

Promotion Calendar

The promotion events planned for a period of time.

Promotion Versioning

Promotion Versioning is the ability to define a set of locations or store subsets that a promotion will be featured in. This also includes the ability to override the store base per version.

Vehicle

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

Vehicle Versioning

Vehicle versioning is the ability to define multiple different vehicles in a promotion each with its own set of pages. Each vehicle may define a set of locations or stores subsets (as a subset of the promotion versions). This includes page versioning as each vehicle has its own set of pages.

What-if

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

Workflow

The customizable path taken in the design of a promotion.

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