# Oracle® Retail Promotion Planning and Optimization

User Guide

Release 13.0

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Oracle Retail Promotion Planning and Optimization User Guide, Release 13.0



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**Value-Added Reseller (VAR) Language**

(i) the software component known as **ACUMATE** developed and licensed by Lucent Technologies Inc. of Murray Hill, New Jersey, to Oracle and imbedded in the Oracle Retail Predictive Application Server - Enterprise Engine, Oracle Retail Category Management, Oracle Retail Item Planning, Oracle Retail Merchandise Financial Planning, Oracle Retail Advanced Inventory Planning and Oracle Retail Demand Forecasting applications.

(ii) the **MicroStrategy** Components developed and licensed by MicroStrategy Services Corporation (MicroStrategy) of McLean, Virginia to Oracle and imbedded in the MicroStrategy for Oracle Retail Data Warehouse and MicroStrategy for Oracle Retail Planning & Optimization applications.

(iii) the **SeeBeyond** component developed and licensed by Sun MicroSystems, Inc. (Sun) of Santa Clara, California, to Oracle and imbedded in the Oracle Retail Integration Bus application.

(iv) the **Wavelink** component developed and licensed by Wavelink Corporation (Wavelink) of Kirkland, Washington, to Oracle and imbedded in Oracle Retail Store Inventory Management.

(v) the software component known as **Crystal Enterprise Professional and/or Crystal Reports Professional** licensed by Business Objects Software Limited ("Business Objects") and imbedded in Oracle Retail Store Inventory Management.

(vi) the software component known as **Access Via™** licensed by Access Via of Seattle, Washington, and imbedded in Oracle Retail Signs and Oracle Retail Labels and Tags.

(vii) the software component known as **Adobe Flex™** licensed by Adobe Systems Incorporated of San Jose, California, and imbedded in Oracle Retail Promotion Planning & Optimization application.

(viii) the software component known as **Style Report™** developed and licensed by InetSoft Technology Corp. of Piscataway, New Jersey, to Oracle and imbedded in the Oracle Retail Value Chain Collaboration application.

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## Glossary

# Preface

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

## Customer Support

- https://metalink.oracle.com

When contacting Customer Support, please provide:

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

## Review Patch Documentation

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

## Oracle Retail Documentation on the Oracle Technology Network

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

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

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

## Conventions

The following text conventions are used in this document:

| Convention | Meaning |
|---|---|
| **boldface** | Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary. |
| *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. It allows you to leverage information gained from Promotion Intelligence to make the best promotion decisions by using what-if analysis and predictive forecasting.

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

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

## About Oracle Retail Promotion Planning and Optimization

Marketers and Merchants use the same environment to execute their strategies. They can plan event calendars, 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.

### 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.

# 2

# Navigation/Setup

The Calendar and Navigator within Promotion Planning and Optimization provides tools to help you plan and create promotions and move around the application. Use this chapter to learn how to use each tool.

---

**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.

---

## Main Work Areas - Calendar and Navigator

The Calendar and Navigator are the primary navigation and item creation tools within Promotion Planning and Optimization.

## 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 high-level promotions and define details for:

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

### Calendar Toolbar and Controls

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

***Figure 2–1 Calendar Toolbar***


- New—use this feature to create new campaigns, events, or promotions
- Delete—use this feature to delete campaigns, events, or promotions

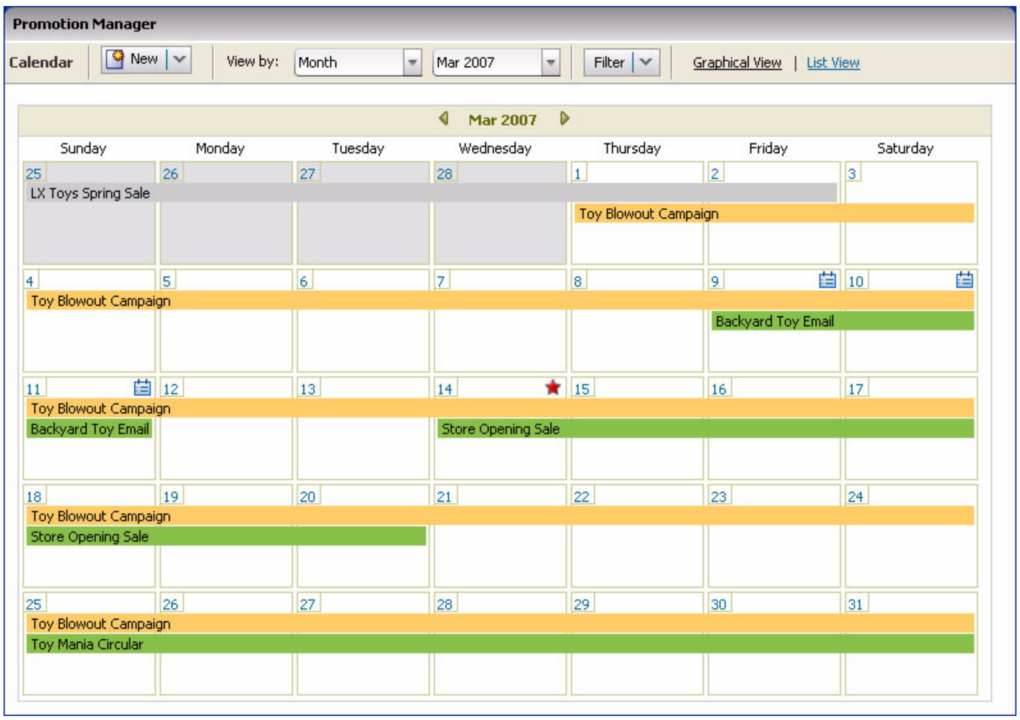
- View By—use this feature to view all campaigns, events, and promotions by the week, quarter, month or year.
- Filter—select the types of events you want to view on the calendar such as campaigns, promotions, company events, personal events or competitor events.
- Graphical View—view all events on the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

### Calendar Views

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

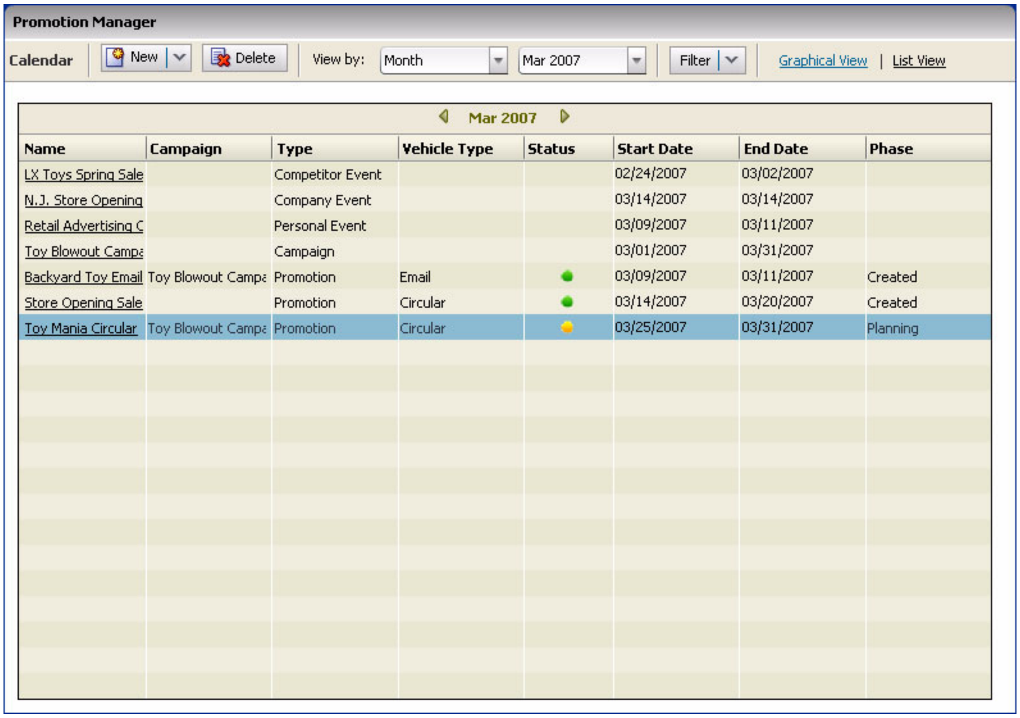
- Select Graphical View to view the calendar in a traditional calendar format (as shown below).

***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***


## Creating Items from the Calendar

To create a new calendar entry

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

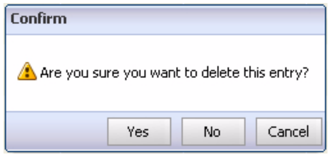
> **Note:** See the chapters on Campaigns and Events and Promotions for complete creation information.

## 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 2–5 Confirm Delete Window*




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

### 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. It contains the following sections:

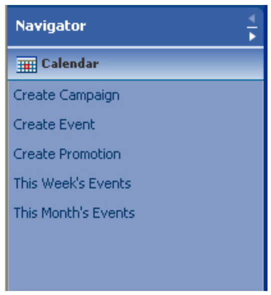
- Calendar
- To Do
- Setup
- Documents
- Reports

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

## Calendar

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

***Figure 2–6 Navigator Calendar Section***



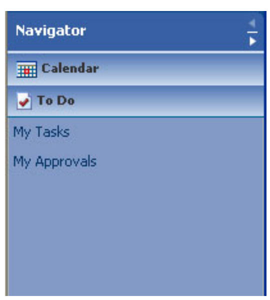

- Use the "Create" links to quickly create promotional items.
- Use the event short cut links to view the current week or month's events.

## To Do

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

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

***Figure 2–7 Navigator To Do Section***



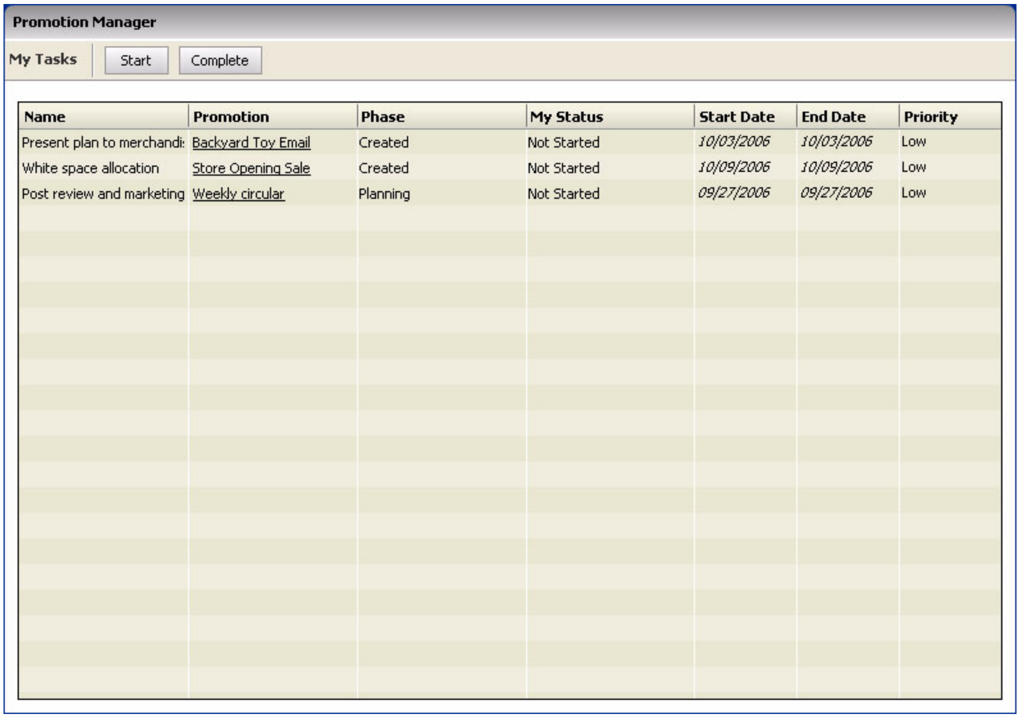

## My Tasks

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

**Working on Assigned Tasks** To work on your tasks

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

***Figure 2–8 My Tasks Window***

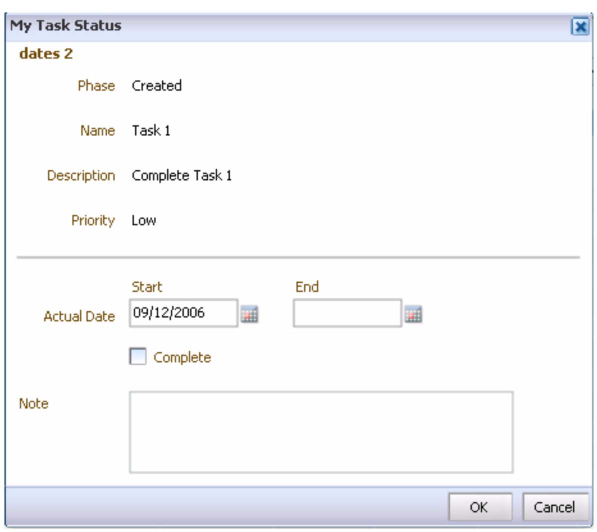



2. Select a task to work on by clicking the link in the Promotion column. The appropriate promotion document opens in Promotion Manager with the Workflow window open.

### Starting Assigned Tasks

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

***Figure 2–9 My Task Status Window***




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

3. Enter additional descriptive or instructional information in the Note field.
4. Click **OK**. 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 Status Window opens.
2. Enter a date in the Actual End Date field, or select Complete if the actual end date is today.
3. Enter additional descriptive or instructional information in the Note field.
4. Click **OK**. 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.

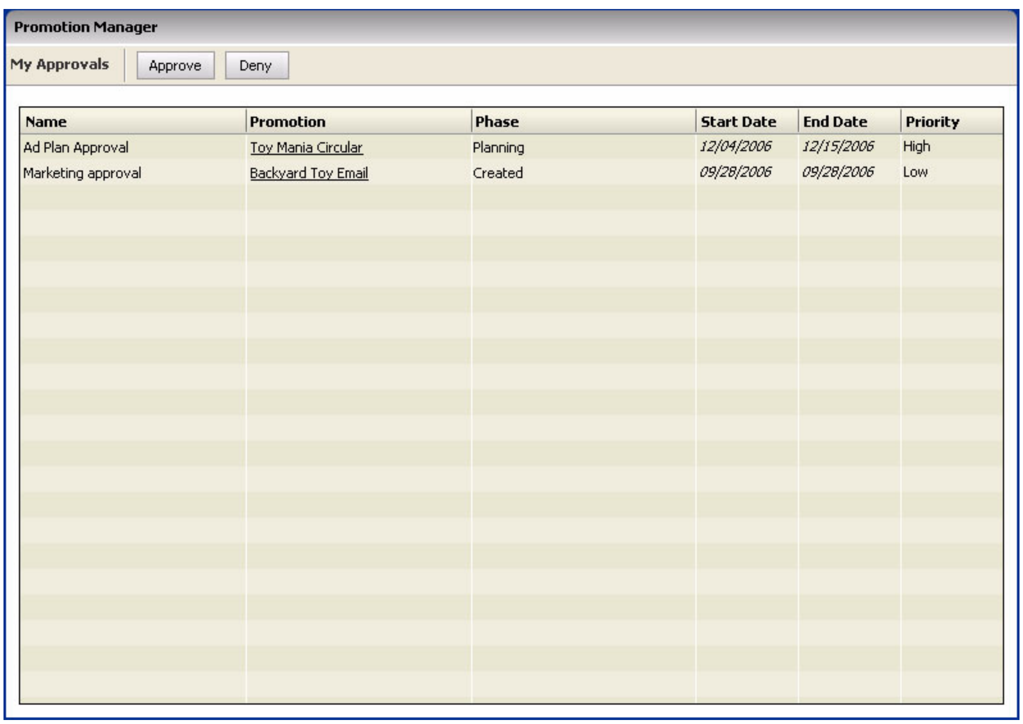
## My Approvals

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 2–10 My Approvals Window***

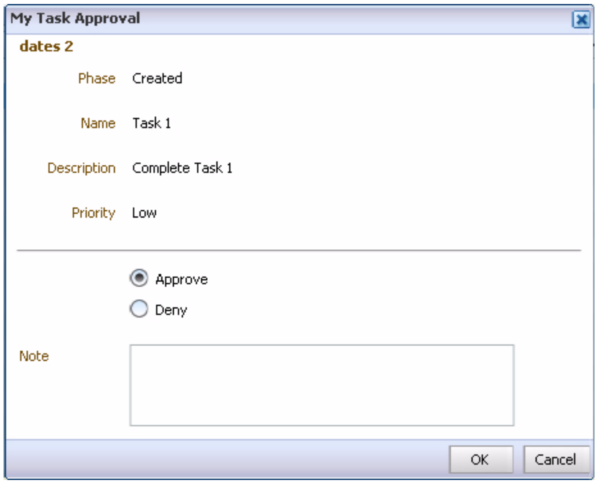



2. Select an approval to make by clicking on the link in the Promotion column. The appropriate promotion document is opened with the Workflow window open.

**Making Approvals** To make an approval

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

***Figure 2–11 My Task Approval Window***




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

**Denying Approvals** To deny an approval

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

## Setup

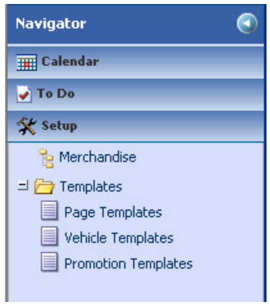
The Setup section lets you manage merchandise, view and edit available templates, and create new templates.

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 Chapter 3, "Templates" for more information on creating and editing templates.

***Figure 2–12 Navigator Setup Section***

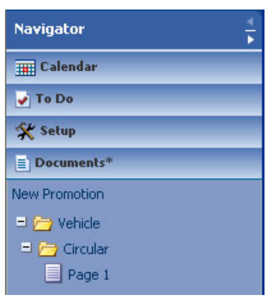



## Documents

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

To return to an open document

***Figure 2–13 Navigator Documents Section***




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

## Reports

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

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

***Figure 2–14 Navigator Reports Section***

## Vertical Tabs: Merchandise Selector, Category Allocation, and Promotion Scorecard

Use the vertical tab between the Promotion Calendar and the Navigator. Expand or collapse the tab using the blue arrow keys.

***Figure 2–15 Minimized Vertical Tabs***

### Merchandise Selector

When you expand the Vertical Tabs, the Merchandise Selector opens by default. The Merchandise Selector provides a view of the merchandise hierarchy. Use it to view and select merchandise levels, view the categories assigned to a promotion or to view or select pre-defined offers to add to a promotion.

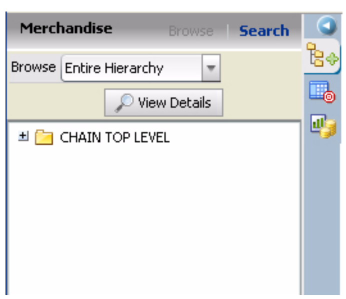
---

**Note:** As you are expanding the Merchandise Hierarchy, you may see "..." appear within the merchandise tree. This indicates that the hierarchy information is being loaded and will appear in a few moments.

---

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

***Figure 2–16 Expanded Merchandise Selector***




3. Using the Browse field in merchandise selector, select one of the following:
   - Entire Hierarchy—show all categories and items in the hierarchy.
   - Assigned Categories—show only those categories that are assigned to the promotion.
   - Offers—show the offers defined for this promotion
   - SKU Lists—show all SKU categories and items.
   - Navigate the displayed hierarchy by expanding each level.
   - View the details of a level.

– Select the level.

– Click **View Details**. The Details window opens.

***Figure 2–17 Details Window***


---

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

---

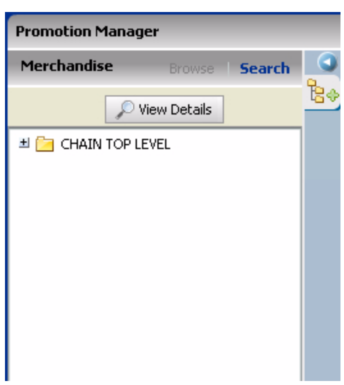
- Drag category folders to the Category, Vehicle Design, Offer Details or Vendor Deal windows
- Drag items to the Offers Details, or Vendor Deal windows.
- Drag offers to the Vehicle Design window.

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

To find merchandise to manage

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

***Figure 2–18 Merchandise Selector Browse view***




2. Navigate to the item you want to manage through the hierarchy by expanding each folder level or Search for items.

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

***Figure 2–19 Merchandise Selector Search View***


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

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

---

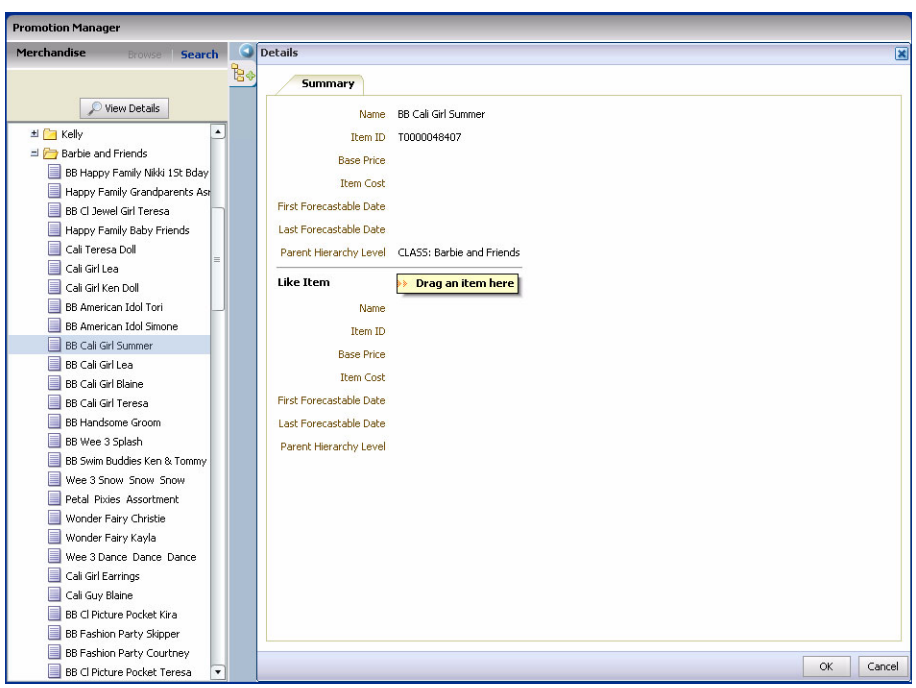
**Note:** An alert may appear if you don't enter enough information in the search criteria fields. Click OK, and enter more criteria.

---

3. Select the item.

4. Click **View Details**. The Details window opens.

***Figure 2–20 Merchandise Details Window***



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

To create a like item association

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

To remove a like item association

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

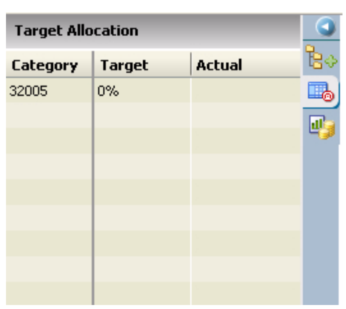
### Target Allocation

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

To view target versus actual space allocation

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

***Figure 2–21 Target Allocation Window***

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

---

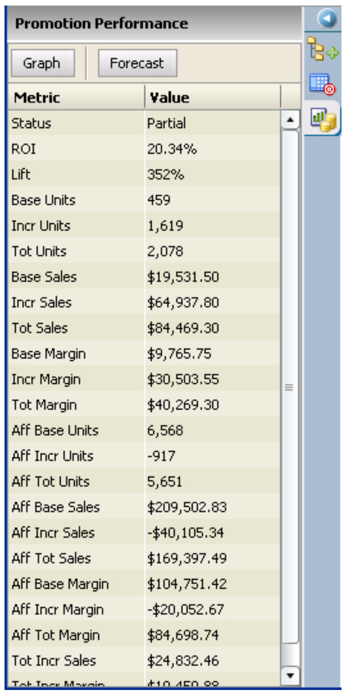
### Promotion Performance

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

To view promotion performance information

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

***Figure 2–22 Promotion Performance Window***



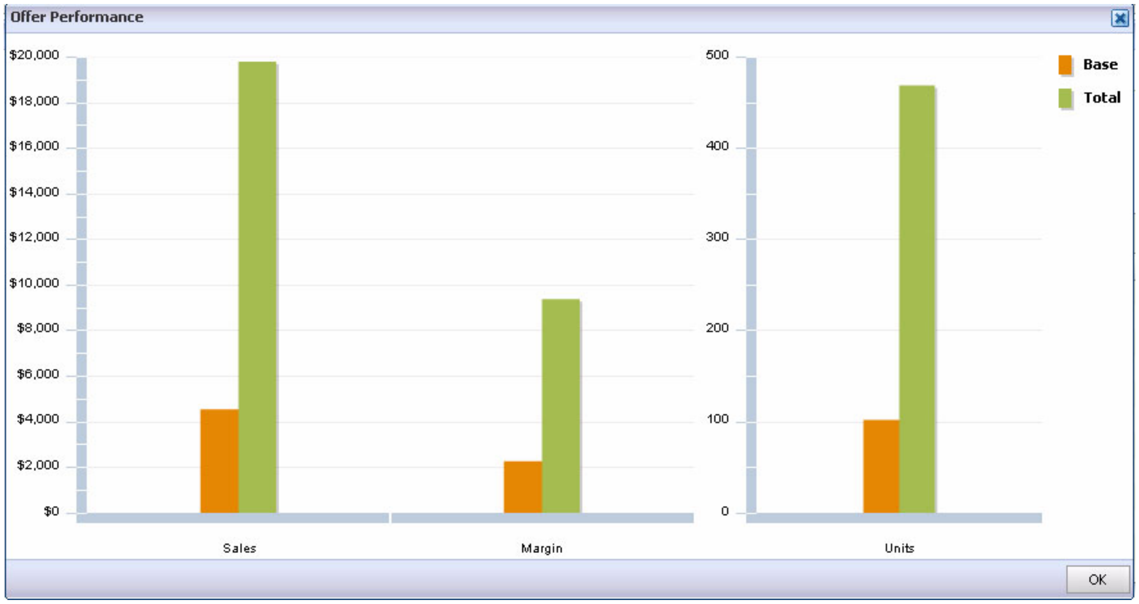

**Forecast** To update the performance metrics for a promotion

- Click Forecast. The metrics are updated.

**Graph** To graph the performance of a promotion

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

***Figure 2–23 Promotion Performance Window***



# 3 Templates

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

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

- Page templates
- Vehicle templates
- Promotion templates

## Page Templates

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

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

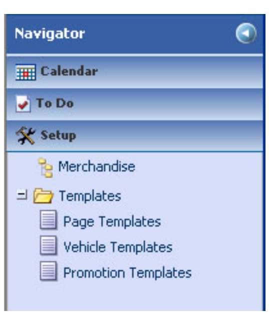
Page templates are associated with individual pages of vehicle templates.

### Viewing Page Templates

To view page templates

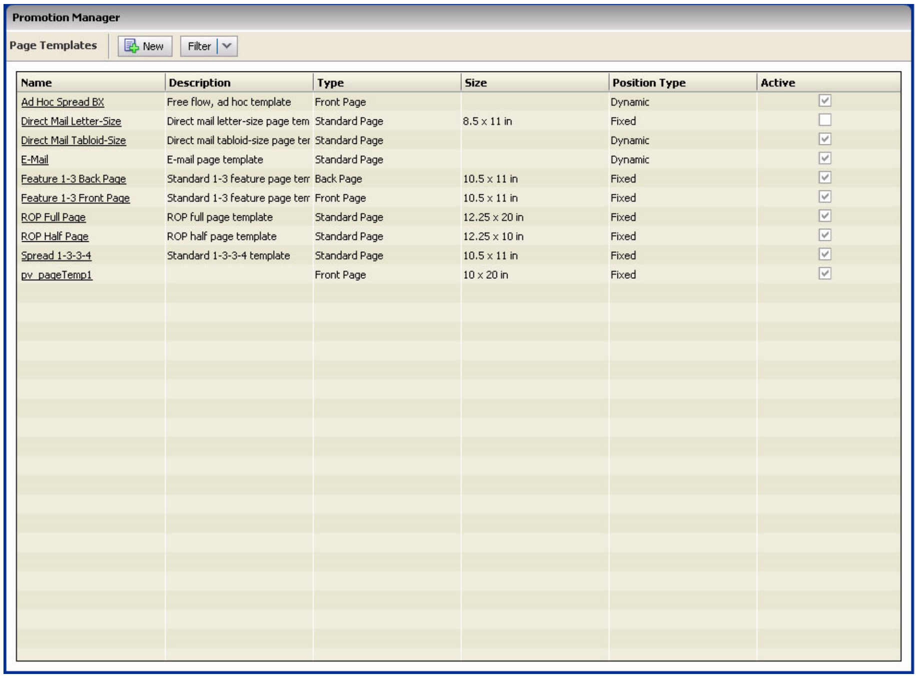
1. Select Setup from Navigator, and expand the Templates folder.

*Figure 3–1 Navigator Setup Section*



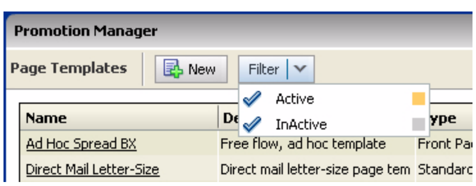

2. Select Page Templates. A list of the available page templates appears in Promotion Manager.

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




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

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

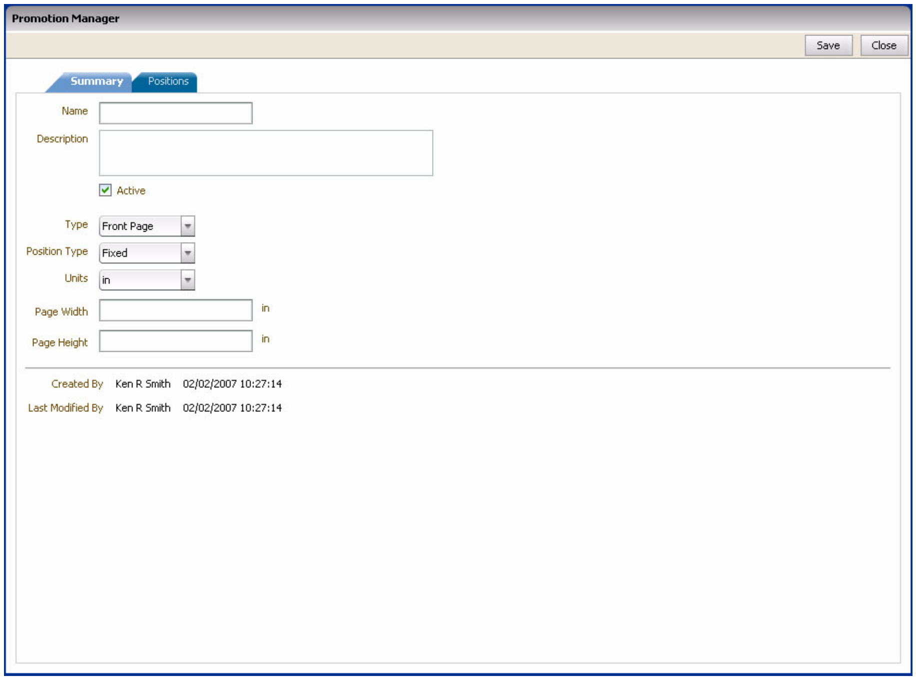



## Creating a New Page Template

To create a new page template

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

*Figure 3–4 Promotion Manager Page Template Window*




## Summary Tab

Enter the following on the summary details tab

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

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

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

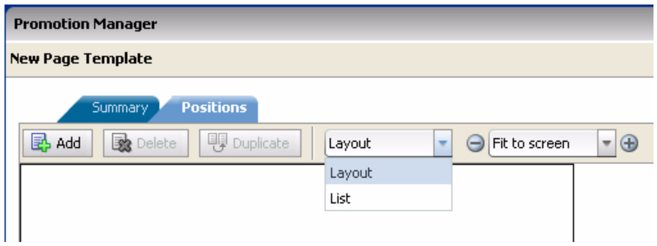
## Position Tab

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

To view the positions on a page template

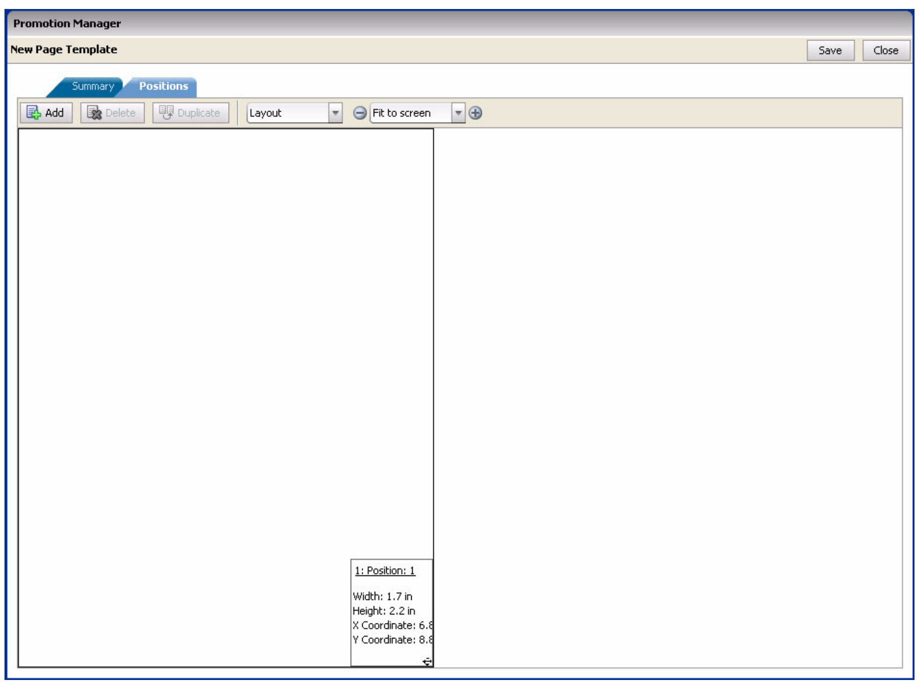
1. Select a page template from the page templates list window or create a new page template.
2. Select the Positions tab. The Positions window opens.
3. Select a method to view the positions.

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



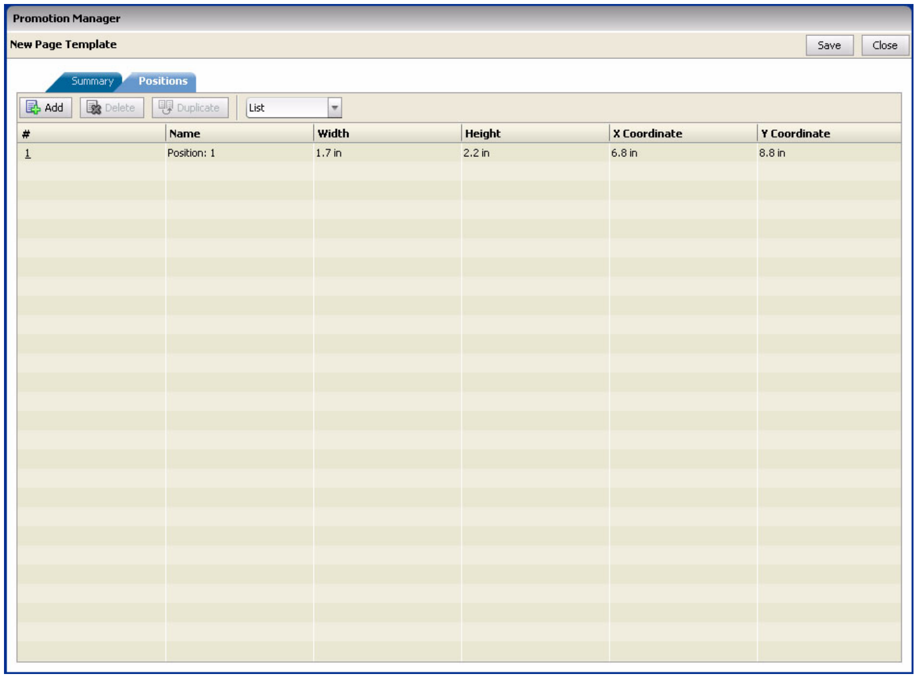

- Layout

***Figure 3–6 Page Template Positions Layout View***




- List

*Figure 3–7 Page Template Positions List View*




## 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. Clear the Active checkbox.
3. Click **Save**. The template list opens.

## Positions

Use the following sections to create and manage page template positions.

### 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.

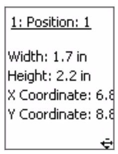
### Defining the Location and Dimensions of a Position Block

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

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

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

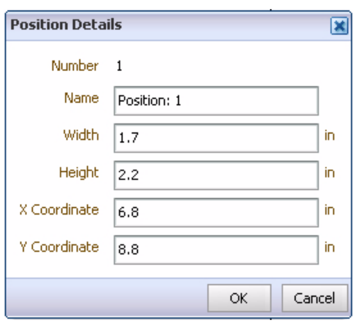
***Figure 3–8 Position Block***




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

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

***Figure 3–9 Position Details Window***




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

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

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

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

1. Select the position block by clicking the number in the # column. The position details window opens.
2. Enter a descriptive name for the position block in the Name field.
3. Enter the width of the position block in the Width field.

4. Enter the height of the position block in the Height field.
5. Enter the X location (left/right) of the position block in the X Coordinate field.
6. Enter the Y location (up/down) of the position block in the Y Coordinate field.

---

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

---

7. Click **OK**.

# Vehicle Templates

Vehicle templates allow you to create and use standardized mediums by which items are promoted. Circulars, TV ads, and in-store displays are types of vehicles. A vehicle template contains pages, each of which is associated with a page template. A vehicle template is then associated with a promotion template.

A vehicle template is associated with a single type of vehicle (media).

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

---

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

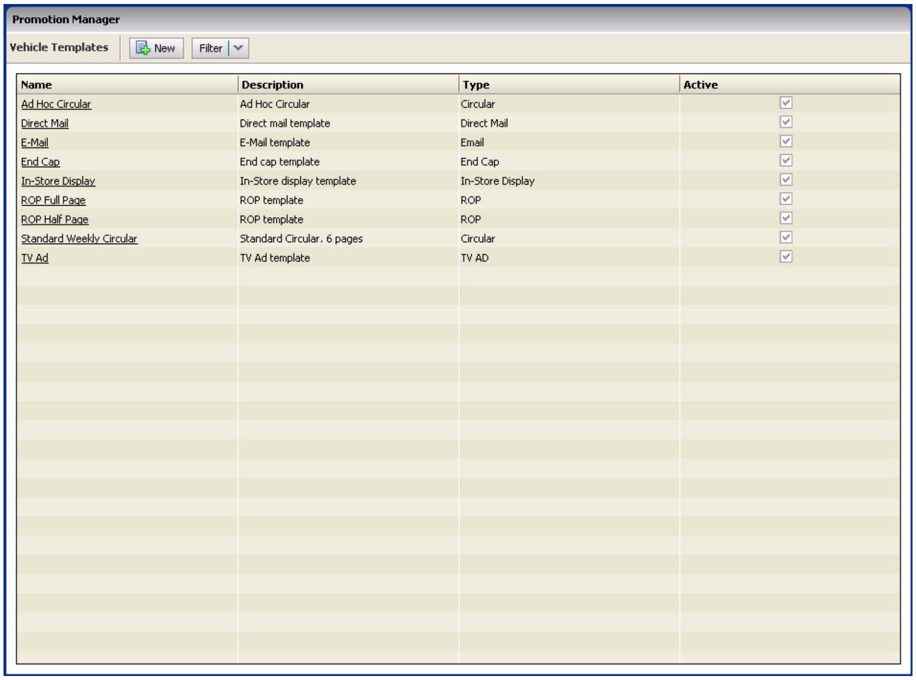
---

## 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 Promotion Manager.

***Figure 3–10 Promotion Manager Vehicle Templates List***



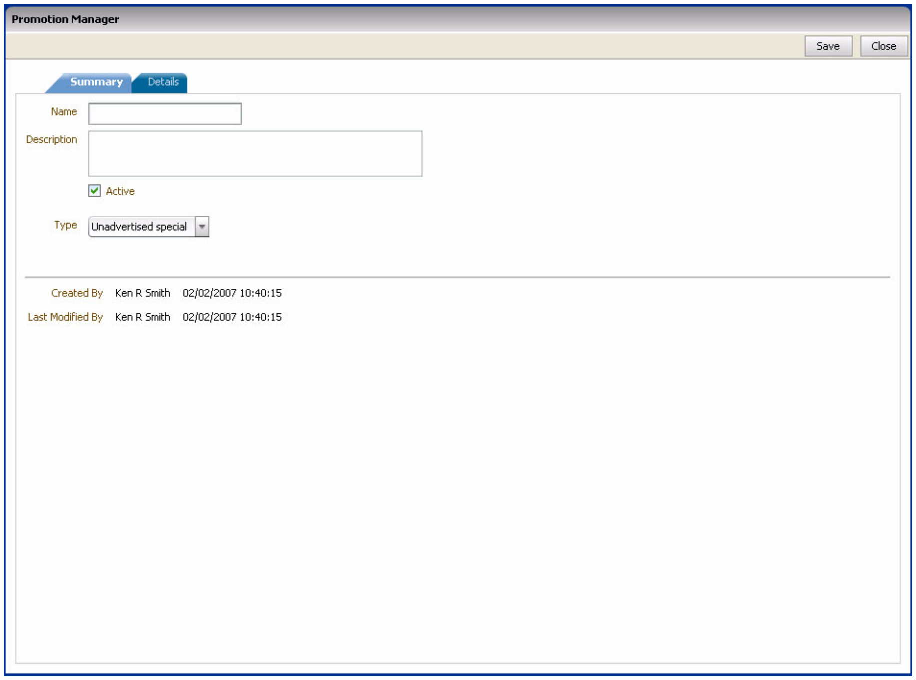

3. Filter the vehicle template list to include or exclude active or inactive templates. Select Active or Inactive. A check mark will appear before the types of templates appearing on the list.

## Creating New Vehicle Templates

To create a new vehicle template

1. Click **New**.
2. The Vehicle Template window opens.

*Figure 3–11 Promotion Manager Vehicle Template Window*




## Summary Tab

Complete the following information when creating a new vehicle template.

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

## Details 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.

> **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.”

To view the details of a vehicle template

1. Select a vehicle template from the vehicle template list or create a new vehicle template.
2. Select the Details tab. The Details window opens.

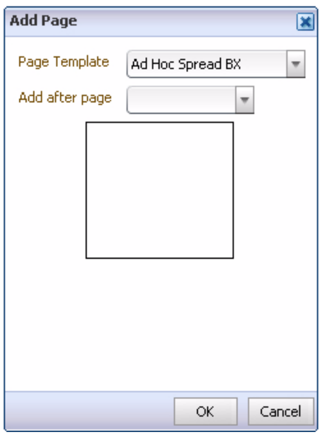
3. Select list or layout view to view the page templates attached to the vehicle template.

**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 3–12 Add Page Window***




2. Select a page template to associate with the new page from the Page Template field.

> **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. Select where to place the page from the Add after page field.
4. Click **OK**.
5. Repeat this procedure to add additional pages.

**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.

## Modifying Vehicle Templates

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

### 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 details window.

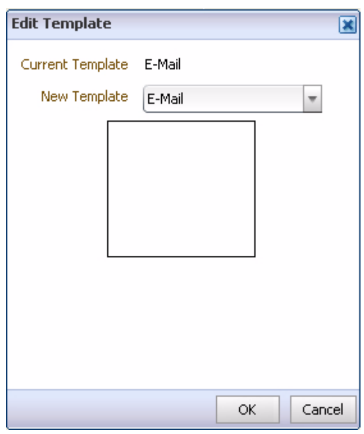
> **Note:** Pages with inactive templates cannot be dragged and dropped until the inactive pages are made active. If you attempt to drag and drop an inactive page, you will receive the following error message: "This vehicle contains one or more pages with inactive templates. These pages must be deleted 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. Click Edit Template. The Edit Template Window opens.

***Figure 3–13 Edit Template Window***




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

## Promotion Templates

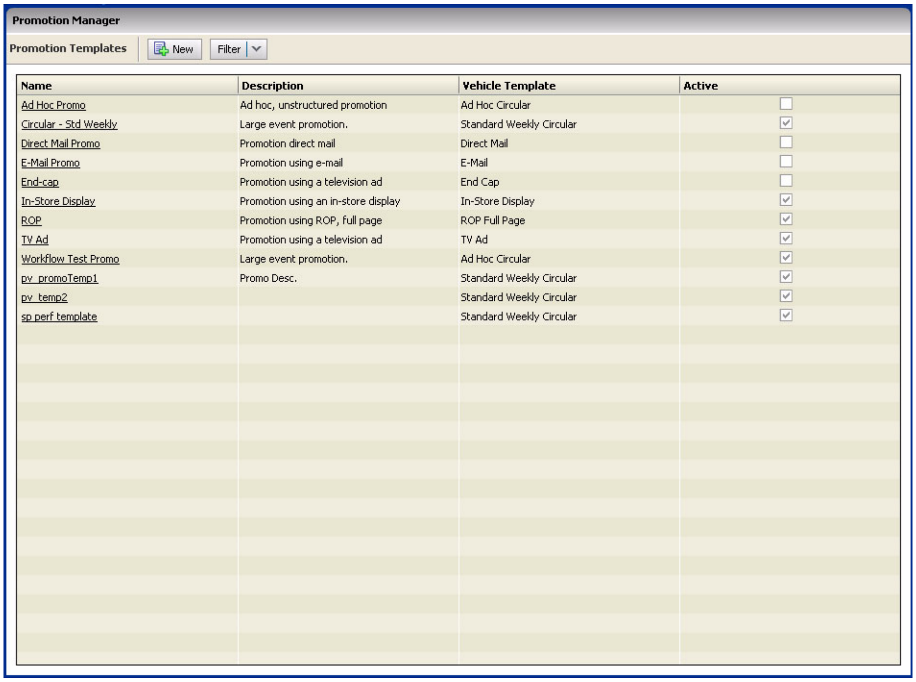
Promotion templates allow you to create and use standard promotions. Promotion templates contain the default tasks and milestones in the workflow. A promotion template may have a vehicle template associated with it.

### 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 3–14 Promotion Manager Promotion Templates List*



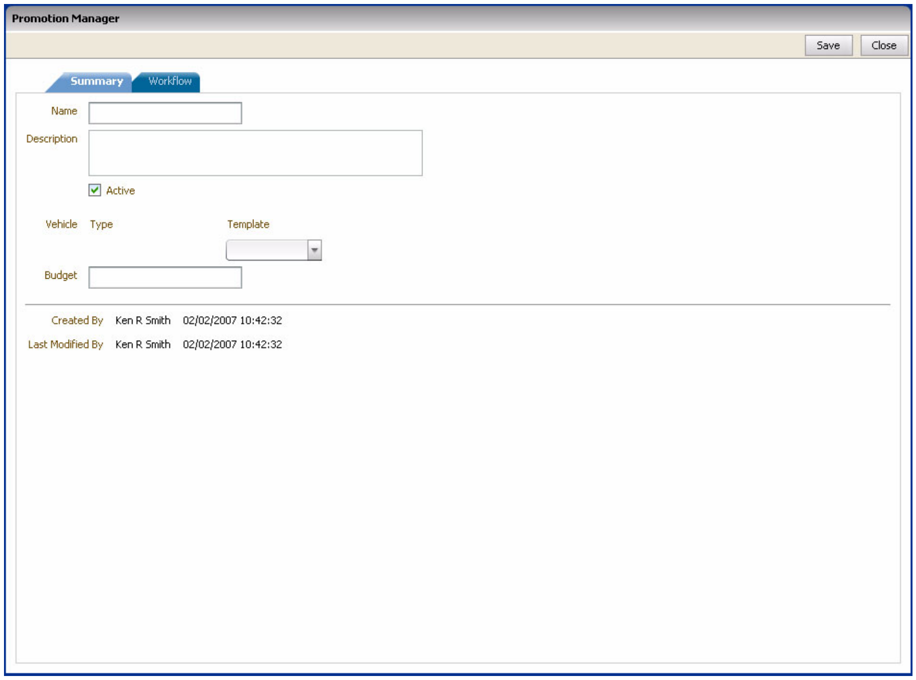

3. Use the Filter drop down menu to filter the promotion template list to include or exclude active or inactive templates. A check mark will appear before the types of templates appearing on the list.

## Creating a Promotion Template

To create a promotion template

1. Click **New**.

*Figure 3–15 Promotion Manager Promotion Template Window*




2. Enter a name for the template.
3. Enter an optional description of the template.
4. Leave Active selected to allow this template to be associated with promotions.
5. Select the vehicle template to associate with this promotion from the Template field. The type of template appears in the Type field.

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

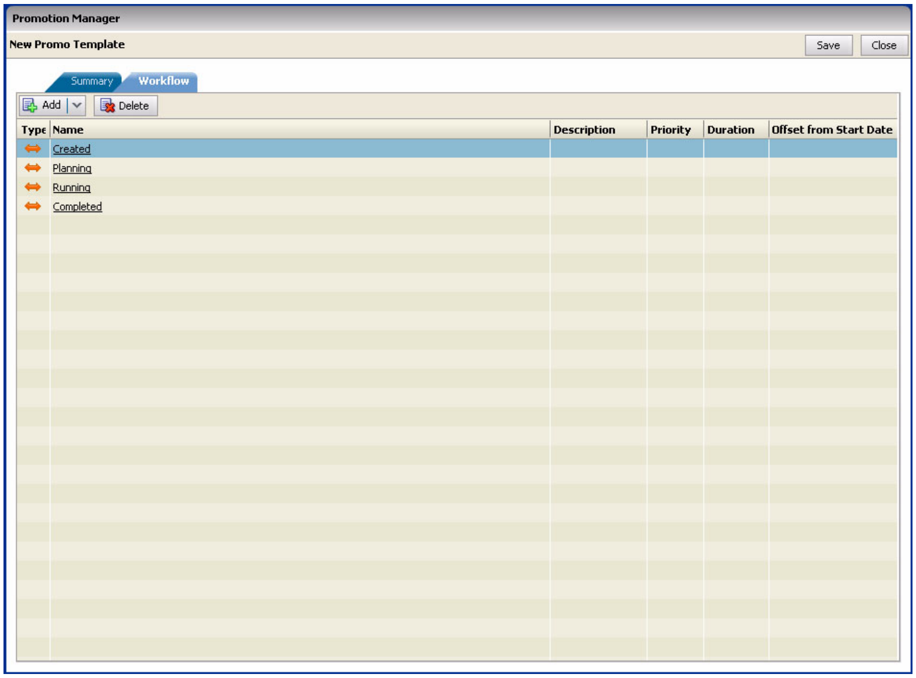
## Workflow

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

To open the workflow window

- Select the Workflow tab. The workflow window opens:

***Figure 3–16 Promotion Manager Promotion Template Workflow***



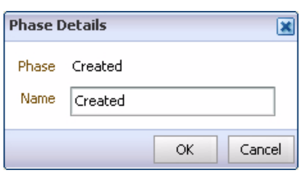

## Phases

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 3–17 Phase Details Window***




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

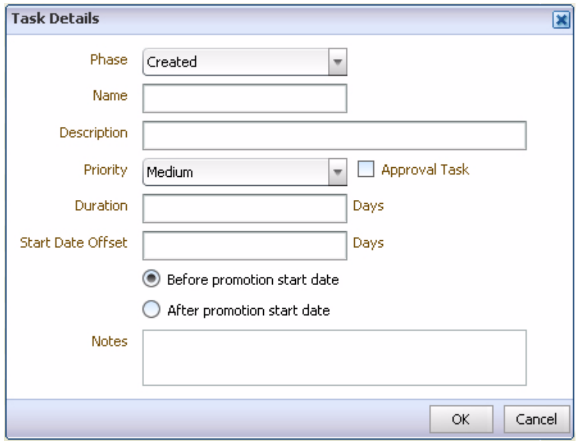
## Tasks

Refer to the sections below for information about adding, modifying or removing workflow tasks.

**Adding Tasks** To add a task to the workflow

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

*Figure 3–18 Task Details Window*




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

**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.

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.

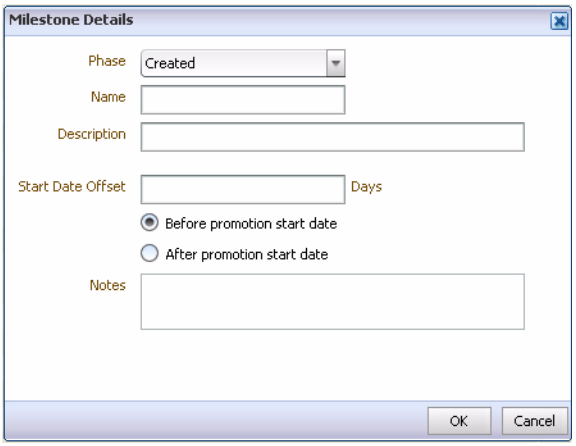
### Milestones

Use the information below to add, modify or remove milestones from the workflow.

**Adding a Milestone** To add a milestone to the workflow

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

***Figure 3–19 Milestone Details Window***




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

**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.

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 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:

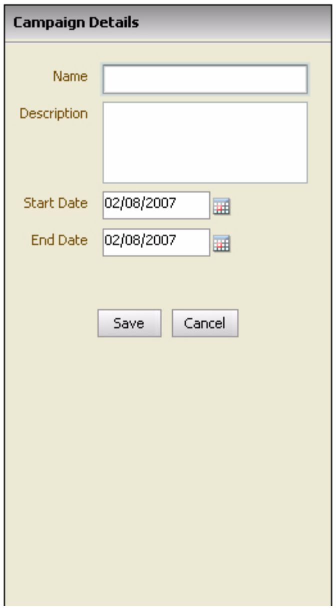
1. Calendar
2. Navigator

### 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. Enter a name for the campaign in the Name field.
4. Enter details about the campaign in the Description field.
5. Enter when the campaign will begin in the Start Date field.
6. Enter when the campaign will stop in the End Date field.
7. Click **Save**. The campaign is added to the calendar.

## 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 above to create 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:

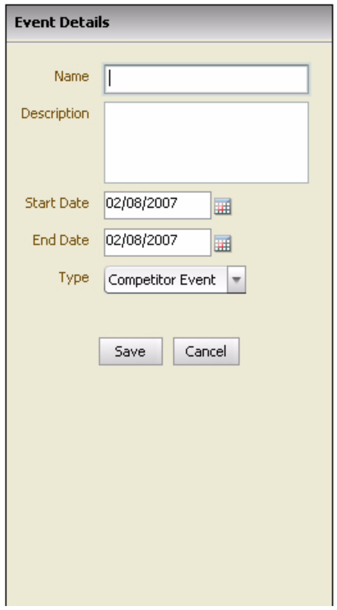
1. Calendar
2. Navigator

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

## 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 above to create 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 Chapter 4 of this guide.

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. More information about collaboration options is available on page 5-3.

---

**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

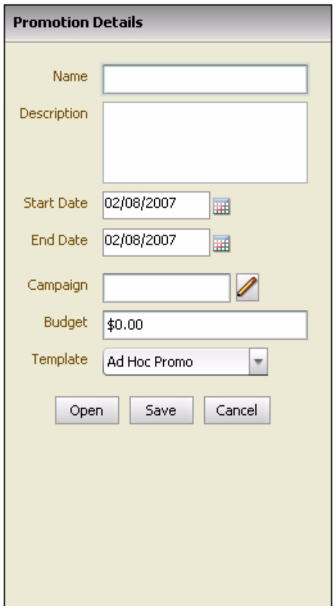
Promotions can be created from the Calendar or the Navigator. Once created, all promotions are accessible from the Calendar.

### Creating Promotions from the Calendar

To create a promotion from the calendar

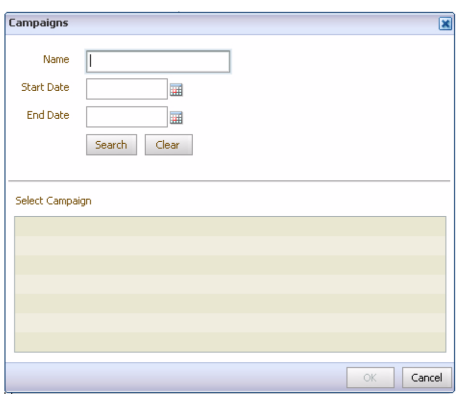
1. Click **New**.
2. Select Promotion. The Promotion Details window opens to the right.

***Figure 5–1 Promotion Details Window***




3. Enter a name for the promotion in the Name field.
4. Enter details of the promotion in the Description field.
5. Enter when the promotion will begin in the Start Date field.
6. Enter when the promotion will end in the End Date field.
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. Limit the Search.
      – Name — enter all or part of the campaign name.
      – Start Date — select a Start Date
      – End Date — select an End Date

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

d. Select the campaign.

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

8. Enter an amount in the Budget field.
9. Select a promotion template to use from the Template field.

> **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.”

10. 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

1. Select the Calendar section of Navigator
2. Click **Create Promotion**. The Promotion Details window opens.
3. Follow steps 3-10 in the previous section for instructions on how to create a new promotion.

## Opening Promotions and Promotion Collaboration

Promotions can be opened immediately after they are created (see Step 10 in "Creating Promotions from the Calendar") or directly from the Calendar.

To open a promotion from the calendar:

1. Double-click on the name of the promotion in the Promotion Manager. The Promotion Details window opens to the right.
2. Select “Single user” or “Multi-User” edit capabilities to the promotion.
   - Single-User — select Single-User if you want exclusive rights to edit the promotion. Other users will be able to open the promotion in a read-only state. A lock will appear indicating that you are the exclusive editor of the promotion. If you open a promotion immediately after you create it, you will open it as a Single-User. Users with the Ad Planner role can obtain an exclusive lock on a promotion.
   - Multi-User — select Multi-User to allow yourself and others to edit the promotion at the same time. While editing a promotion as a multi-user, you may encounter a lock icon located to the right of a tab. This indicates that the tab you are viewing is locked for editing by another user. The name of the user with the lock will display.

***Figure 5–3 Promotion Collaboration—Exclusive Lock Icon***

- An exclusive lock is created when any of the following edits are made to a promotion:
  - Changing a Promotion's Vehicle Type
  - Changing a Promotion's Template
  - Changing a Promotion's Vehicle Template
  - Adding a Page
  - Reordering Pages
  - Changing a Phase Begin Date
  - Changing a Phase End Date
  - Adding a Task or Milestone
  - Reordering a Task or Milestone
  - Removing a Task or Milestone
  - Moving a Task or Milestone
  - Moving a Task or Milestone
  - Adding a Task or Milestone Assignment
  - Removing a task or Milestone Assignment

3. Click **Open**. The Promotion Manager changes to a tabbed window with the Summary tab open.

## The Promotion Manager

The Promotion Manager allows you to design and add details to your promotions. It contains the following tabs:

- Summary — provides summary level information about an open promotion. More information about the Summary tab can be found on page 5-6.
- Vendor Deals — Vendor Deals for your promotion can be added and managed on this tab. More information about the Vendor Deals tab can be found on page 5-7.
- Categories — assign categories of merchandise to your promotion. More information about the Categories tab can be found on page 5-9.
- Offers — create and define offers for your promotion. More information about the Offers tab can be found on page 5-13.
- 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. More information is available on page 5-32.
- Workflow — assign tasks and keep track of promotion activities. More information about the Workflow tab can be found on page 5-48.

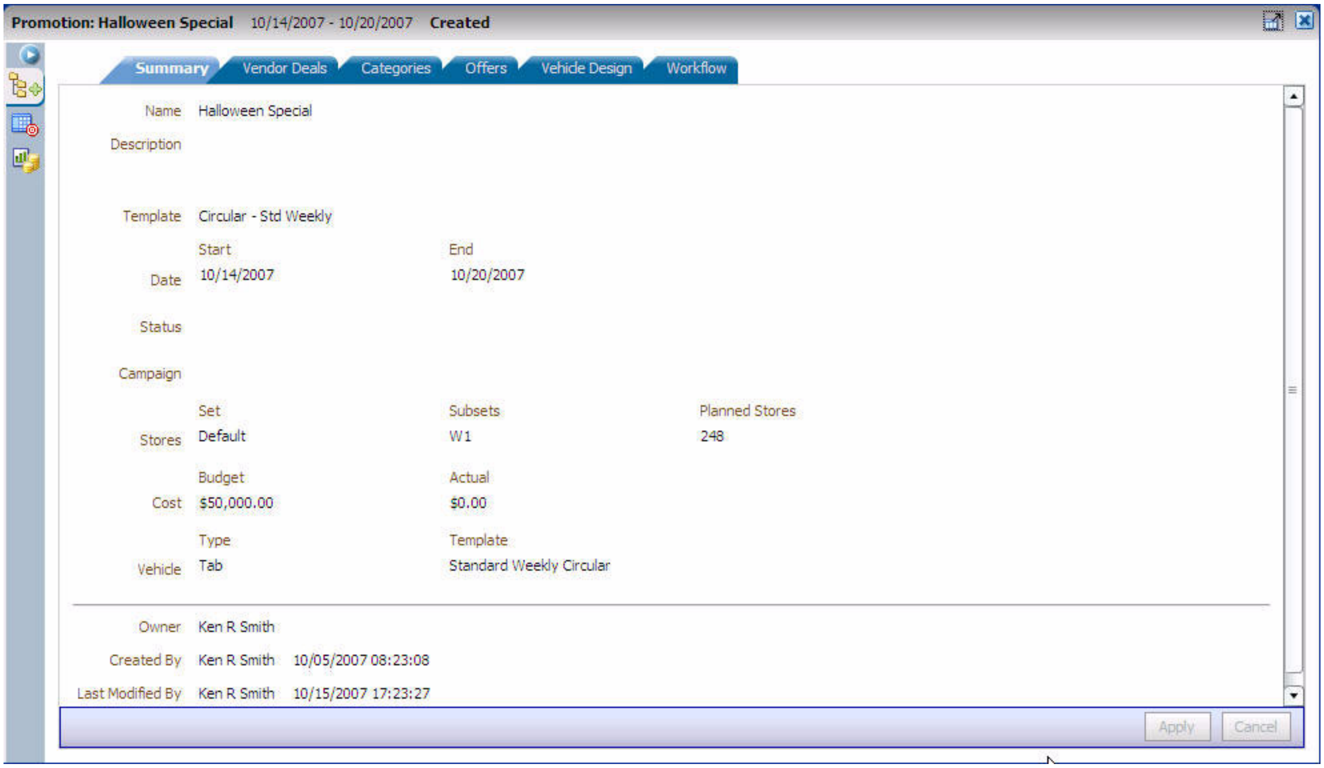
## Summary

The Summary window 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 name of the owner, creator, and the last person to modify the promotion as well as the dates of creation and last modification.

To add summary details to a promotion:

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

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



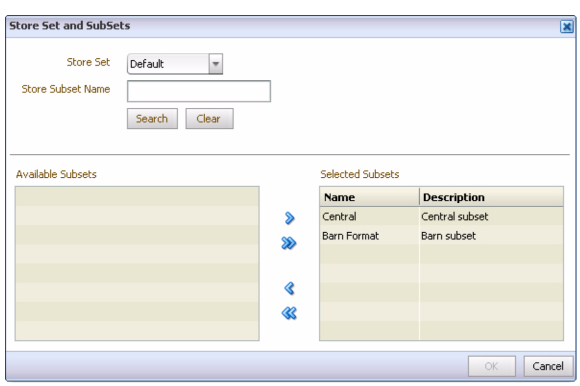

2. Select the Status of the promotion.

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

3. Select the set of stores that the promotion will apply to in the Stores section.

   a. Click the Search button (pencil icon). The Store Sets and SubSets search window opens.

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

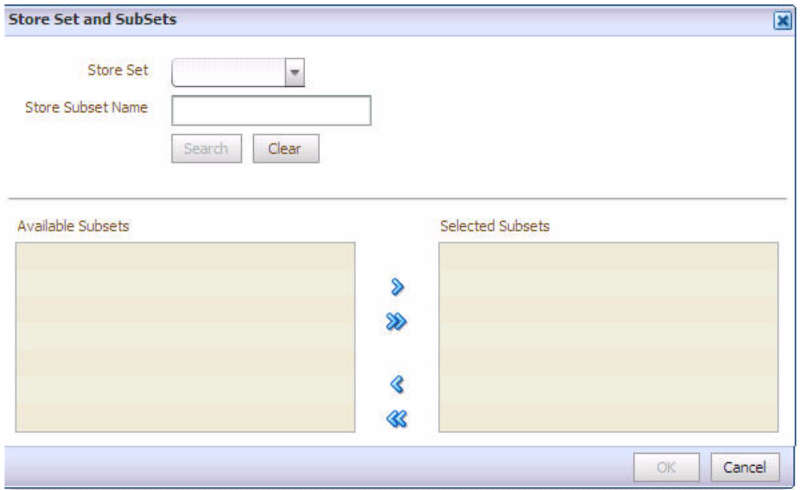


b. Select a set from the Store Set field.

c. Enter all or part of a name in the Store Subset Name field, or leave the field blank.

d. Click **Search**. The subsets that meet the search criteria appear in the Available Subsets list.

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




e. Select the necessary subsets from the Available Subsets list.

f. Click the right arrow to move the subsets to the Selected Subsets list. Click the double right arrow to move all the subsets to the Selected Subsets list.

g. Click **OK**. The store sets and subsets are assigned to the promotion.

4. Enter the actual cost in the Actual field if it is known.
5. If a vehicle template has not been associated with the promotion, select the template to be used for the vehicle from the Template field.
6. Click **Apply** to update the promotion with the information.
7. Click on other tabs within the Promotion Manager window to enter additional information.

## Overriding Planned Stores

After selecting the planned stores and related subsets for a promotion, you may want to edit the number or planned stores. For example, you may be running a promotion in just some of the stores in the store subset or you want to manually account for future store openings and closings.

To override the number of planned stores

1. Open a Promotion. The Promotion Manager opens.
2. Select the Summary Tab from the Promotion Manager window
3. Enter an override value in the **User Override** box
4. Select the Offer tab from the Promotion Manager window
5. Click **Forecast**
6. The forecast metrics are now updated with the new planned store count value.

# Vendor Deals

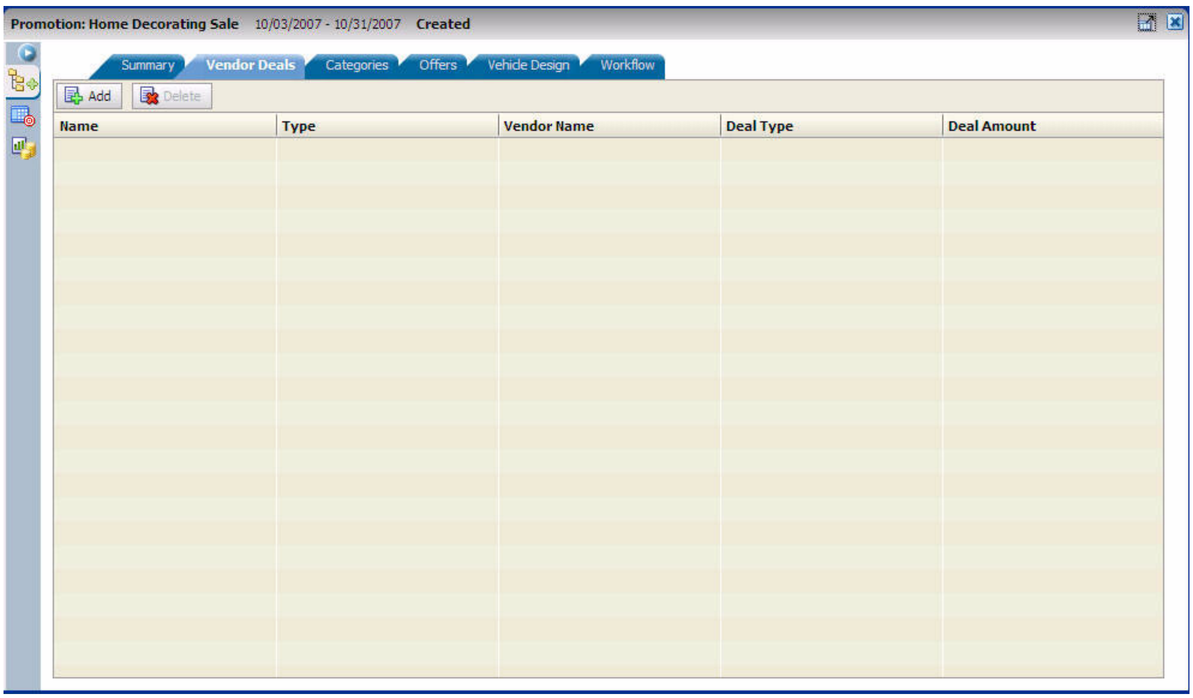
The Vendor Deals tab lists the deals you have with vendors for items on your promotion. Deals are listed in a table format. Depending on your role, you can add or delete vendor deals from the Vendor Deals window.

## Adding a Vendor Deal

To add a vendor deal

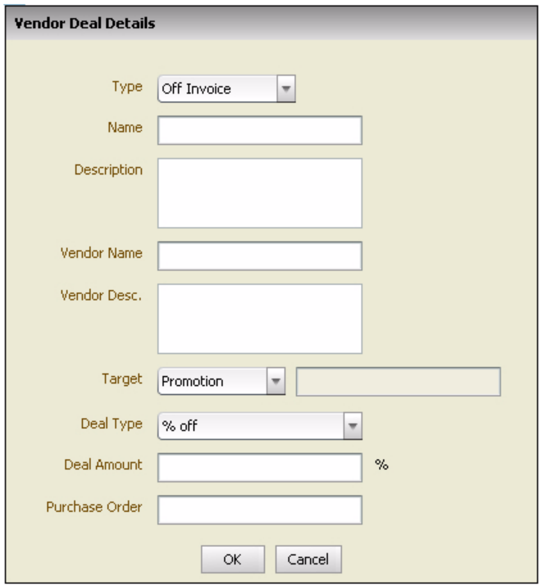
1. Open a promotion.
2. Select the Vendor Deals tab of Promotion Manager. The Vendor Deals window opens.

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



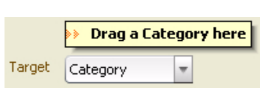

3. Click **Add**. The Vendor Deal Details window opens.

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




4. Select the type of vendor deal:
   - Off Invoice — You receive a percentage or monetary amount off a vendor or supplier invoice in exchange for advertising specific merchandise on a promotion.
   - Volume Purchase — a vendor or supplier agree 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. Enter a name for the deal in the Name field.
6. Enter details of the deal in the Description field.
7. Enter the name of the vendor offering the deal in the Vendor Name field.
8. Enter a description about the vendor offering the deal in the Vendor Desc field.
9. Select the target of the deal:
   - Promotion
   - Category
     – Drag a category from the merchandise selector to the Drag a Category here bar above the Target field.

***Figure 5–9 Target Field***



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

***Figure 5–10 Target Field***


10. The following is dependent on the Type of Vendor Deal you selected in Step 4 on the previous page:
    - 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. Select the deal type
    - % Off (Percent off)
    - $Off (Dollar off)
12. Enter the amount of the deal in the Deal Amount field.
13. Enter an associated purchase order number in the Purchase Order field.
14. Click **OK** to add the vendor deal to the list.

## 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**. The Confirm window opens.
3. Click **Yes** to delete the deal.

# Categories

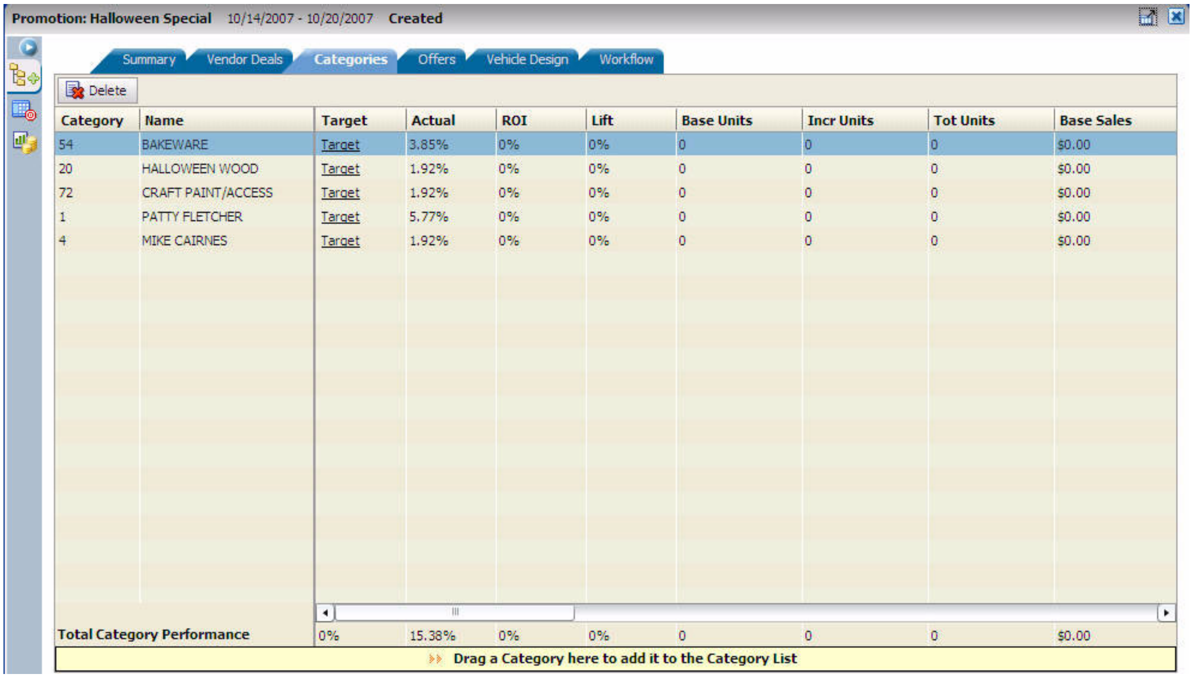
Use the Categories tab within the Promotion Manager to add categories using the merchandise hierarchy and to delete categories from the promotion.

## Adding Categories to a Promotion

To add a category to a promotion:

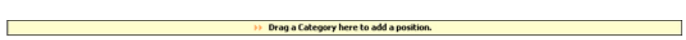
1. Select the Category tab of the Promotion Manager. The Category window opens.

*Figure 5–11 Promotion Manager Category Window*



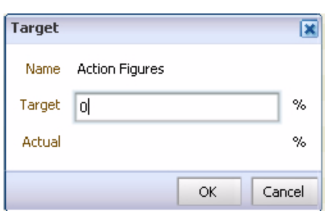

2. Using the Vertical Tabs, open the Merchandise Selector. Browse the Entire Hierarchy or use the Search option to search for categories by level of merchandise, such as class or subclass.
3. When you have located a category to add, drag and drop the category to the bar at the bottom of the window. The category will now appear in the table.

*Figure 5–12 Drag Category Here Bar*




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

*Figure 5–13 Target Window*




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

## Deleting Categories from a Promotion

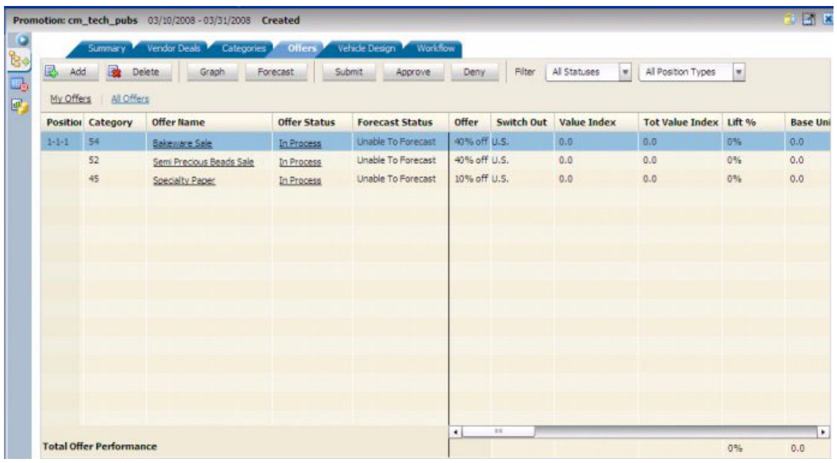
To delete a category from a promotion:

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

## Offers

Use the Offers tab within the Promotion Manager to create and manage offers for your promotion. The Offers tab lists all current offers with positioned offers (offers that have already been assigned to a position within your promotion vehicle) listed before unpositioned offers.

***Figure 5–14 Promotion Manager Offers Tab***



The following functions are available:

- Add — add a New Offer.
- Delete — delete an existing offer.
- Graph — select an individual offer or all offers and view a performance graph.
- Forecast — update the performance metrics for your promotion.
- Submit—submit individual offers or all offers for submission. For more information, see "Submitting An Offer" on page 5-18.
- Approve—approve individual offers or all offers for approval. For more information, see "Approving An Offer" on page 5-19.
- Deny—reject individual offers or all offers. Fore more information about rejecting offers, see "Rejecting An Offer" on page 5-21.
- 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 5-17.
- Positions Menu—use this menu to filter offers according to their position status. Display either All Position Types, Positioned or Unpositioned 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.

- Total Offer Performance — view performance metrics for all of the Offers in your promotion.

For all offers listed within the Offers tab, the following information is available as described in Table 5-1.

***Table 5–1 Offers Tab — Individual Offer Details and Metric Definitions***

| Field | Description |
|---|---|
| Position | If the offer is positioned already within the promotion vehicle, the page, position on the page, and the offer number is listed. |
| Category | The Category ID number of the Offer's assigned categories from within the Merchandise Hierarchy. |
| Offer Name | Name of the offer |
| 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.<br>Note: You must have edit access to an offer in order to change its status. |
| Forecast Status | The current status of the Offer's forecast. For more information, see Forecasting  on page 5-26. |
| SKUs Forecasted | Indicates the number of SKUs in the offer that have a forecast |
| Offer | Value of the Offer (%Off, $Off, etc.) |
| Switch Out | If the specified offer is a Switch Out offer, this field will be populated with the Switch Out offer type. For more information about Switch Out offers, see  on page 5-16. |
| 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/total number of offers)) * 100, where the number of offers is based on a configuration setting that determines whether to count unpositioned offers. |
| Lift% | ((Total Units - Base Units) / Base Units) * 100 |
| 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 |
| Incr Units | Sum of Incremental Units for all Items |
| Tot Units | Sum of Total Units for all Items |

**Table 5–1 (Cont.) Offers Tab — Individual Offer Details and Metric Definitions**

| Field | Description |
|---|---|
| Base Sales | Sum of Base Sales for all Items |
| Incr Sales | Sum of Incremental Sales for all Items |
| Tot Sales | Sum of Total Sales for all Items |
| Base Margin | Sum of Base Margin for all items |
| Incr Margin | Sum of Incremental Margin for all items |
| Tot Margin | Sum or Total Margin for all items |
| Aff Base Units | Sum of Affinity Base Units for all items |
| Aff Incr Units | Sum of Affinity Incremental Units for all items |
| Aff Tot Units | Sum of Affinity Total Units for all items |
| Aff Base Sales | Sum of Affinity Base Sales for all items |
| Aff Incr Sales | Sum of Affinity Incremental Sales for all items |
| Aff Total Sales | Sum of Affinity Total Sales for all items |
| Aff Base Margin | Sum of Affinity Base Margin for all items |
| Aff Incr Margin | Sum of Affinity Incremental Margin for all items |
| Aff Tot Margin | Sum of Affinity Total Margin for all items |
| Tot Incr Sales | Affinity Incremental Sales + Incremental Sales |
| Tot Incr Margin | Affinity Incremental Margin + Incremental Margin |
| #SKUs | Number of SKUs contained within the offer |

## Offer Details

The Offer Details window is your main work area when adding offers to a promotion. While the Offers tab displays all offers for a promotion, the Offer Details window is used specifically to add details to new offers or to view the details of existing ones. For more instructions on how to add an Offer, see Adding an Offer on page 5-14. The Offer Details window contains upper and lower screens. A descriptions of these fields is provided in Table 5-2.

**Table 5–2 Offers - Individual Offer Detail Information**

| 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 |
| 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 and/or Low price. |
| Include in Forecast? | If selected, offer will be included in forecast. If it is not selected, offer will not be included in forecast calculations. |
| (optional) Switch Out | Note: This feature is only available if it has been configured for your installation of Promote.<br>Indicates if the offer is a Switch Out offer and the type of offer |

*Table 5–2 (Cont.) Offers - Individual Offer Detail Information*

| Field | Description |
|---|---|
| Name | Name of the merchandise |
| Description | Brief Description of the offer |
| Type | Offer Type |
| Excluded | If checked, all items that meet filter criteria have been excluded |
| Filtered | If checked, supplier or price criteria has been defined for the offer |
| 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 |
| Supplier | Supplier name |
| Price | Price of the item |
| #SKU's | Number of SKUs associated with the offer |
| Criteria View | View the offer according to the criteria in rows 5 through 12 of this table |
| SKU View | View all SKUs associated with the offer |
| View By Filter | Select filter options to view offers according to location in merchandise hierarchy |

### Offer Details: Additional Options

When adding or opening an existing offer, use the tabs located in the Offer Details window to enter/view additional information about your offer.

- Demand Drivers — define the attributes that describe how your offer may perform based on how it is featured in a promotion. More information about Demand Drivers can be found on page 5-22.
- Performance & What-If — view forecast data and experiment with what-if scenarios. More information about Performance & What-If functions can be found on page 5-22.
- Media Details — include media details for your offer such as images, headlines, and body copy. More information about Media Details can be found on on page 5-28.
- 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 on entering notes, see "Adding Notes to a New Offer" on page 5-31.

Three buttons are located at the bottom of each of the above tabs as follows:

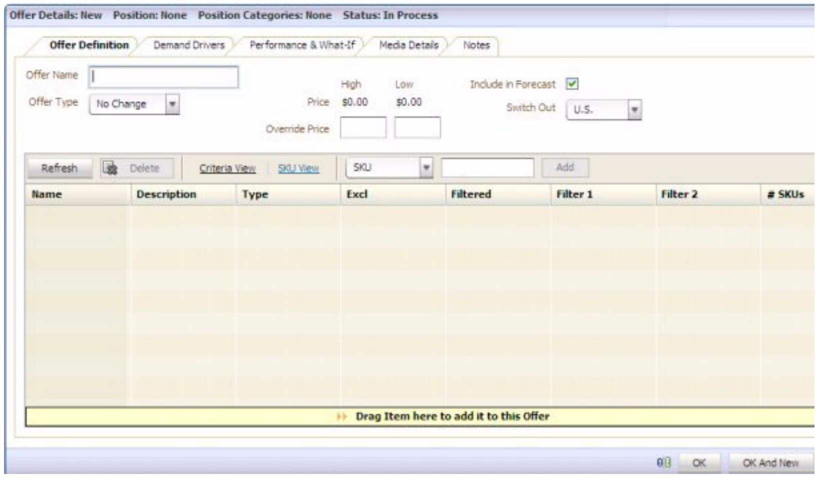
- Ok — save the changes to your current offer
- OK and New — save the changes to your current offer and create a new offer without exiting.
- Cancel — exit the current offer without saving any changes.

## Adding An Offer

Use the following to add an offer to a promotion:

1. From the Offers tab, select **Add**.

*Figure 5–15 Offer Details Window — Adding an Offer*




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

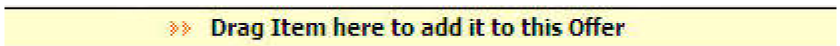
> **Note:** If it is left blank, the Offer name field defaults to the name of the first item on the offer.

3. Select the type of offer in the Offer Type field. Your offer types may vary. The following are the basic offer types supported by Promotion Planning and Optimization:
   - $Off — a specific monetary amount off the items on the offer.
   - % Off — a specific percentage off the price of the items on the offer.
   - Discount Price — a specific price for an item on the offer.
   - Everyday Low Price — the regular low price of an item on the offer.
   - Buy One... — an additional item or discount off an additional item with the purchase of one or more items.
   - Free Gift with Purchase — a gift for purchasing an item.
   - Instant Rebate — a monetary amount given back for purchase of an item.
4. Enter or select the amount or percentage off in the Offer Amount field.
5. (Optional) Override the system calculated Hi and Low Price. Promote will autofill these fields by selecting the highest and lowest Item Price value from all the (non–excluded) SKUs in the offer.
6. (Optional) Select the "Include in Forecast" checkbox to include the offer in the promotion forecast.
7. (Optional) If available in your installation of Promote, select a Switchout offer type from the list.
8. Open the Merchandise Selector to add items to your offer. Using the Browse menu, select one of the following:
   - Assigned Categories — add items to your offer from categories that have already been assigned to the promotion

- 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.
- Entire Hierarchy — use the Search and Filter option with the Merchandise Selector to locate items to include in your offer.
- No Items—create an offer that does not include merchandise.

9. Drag your selected items from the Merchandise 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 5–16 Drag Item to Offer Bar***




10. 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.
11. 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 5-17.

## Creating a Switchout Offer

> **Note:** This option is available if configured for your version of Promote.

A switchout offer is an offer that can be used in place of another offer should different versions of the same offer be required.

To create a switchout offer

1. Follow steps 1 through 8 for Adding an Offer on page 5-14.
2. Locate the Switch Out drop–down menu. Select the Switchout option.
3. To save your Switch Out offer:
    - Click **OK and New** to save your Switch Out offer and to create additional offers.
    - Click **OK** to save your offer and close the Offer Details window.

## 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.

## Editing an Existing Offer

To edit an existing offer

1. Open a promotion from the calendar or navigator.
2. 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 9 of Adding an Offer  on page 5-14.

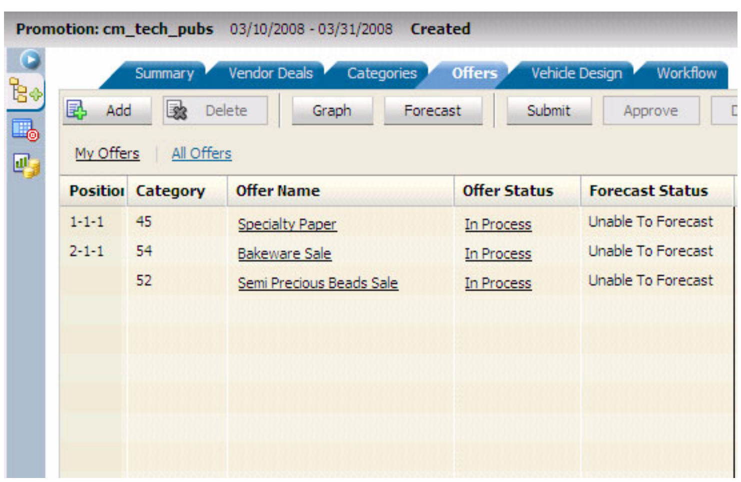
## Submitting, Approving, and Rejecting Offers

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

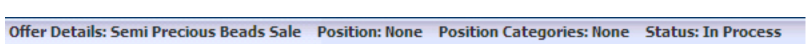
Offer status information is available from the Offers tab of the Promotion Manager and the Offer Details window label when an offer is created or opened.

***Figure 5–17 Promotion Manager—Offers Status Column***




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

***Figure 5–18 Offer Status Info Viewable from Offer Details Window***




Offer Statuses are as follows:

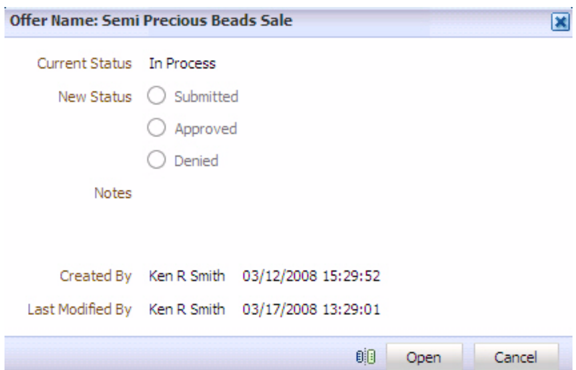
- In Process—the offer is in the process of creation. By default, all newly created offers are given the status of “In Process”. In addition, if a user edits information that impact’s an offer’s forecast and the offer has a status of “Submitted”, “Approved” or “Denied”, the offer’s status will return 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 5–19 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 quality 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” quality 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**.

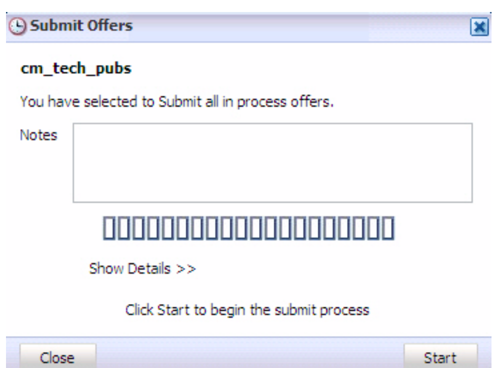
**Submitting a Single Offer Using the Offer Status Window** To submit an offer using the Offer Status window

1. From the Offers tab, click onto an offer's offer status link from the Offer Status column.
2. The Offer status window opens
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.
2. Click **Submit**. The Submit Offers window opens. Click **Start** to begin the submission process.

***Figure 5–20 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 5-18.

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

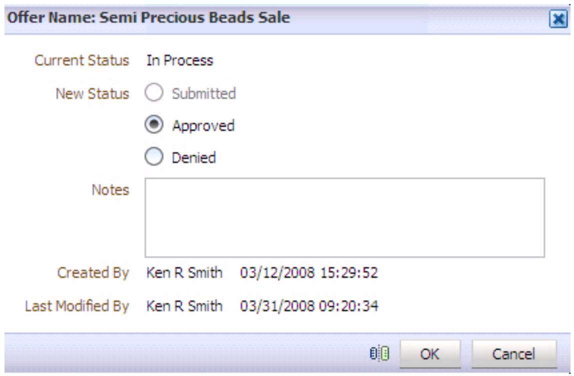
## Approving An Offer

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 5–21 Approve Offer Status Window*

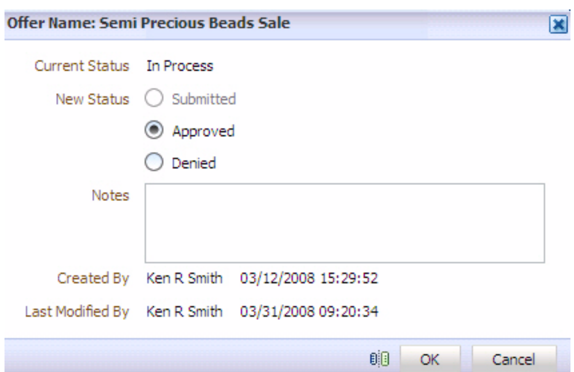



3. Select the **Approve** radio button.
4. Enter notes if desired.
5. Click **OK** to approve the offer. Click **Cancel** to cancel the approval process.

**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 5–22 Approve Offer Status Window*

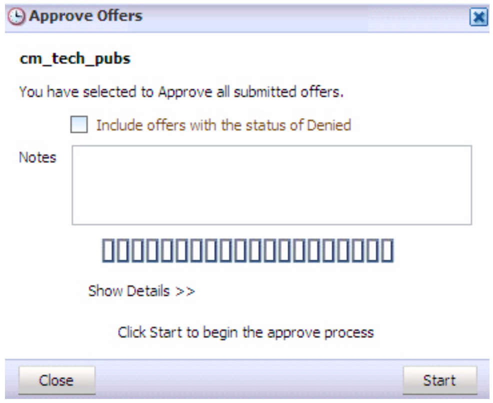



2. Select the **Approve** radio button.
3. Enter notes using the **Notes** field.
4. Select **OK** to submit the offer. Click **Cancel** to cancel the approve process.

**Approving All Offers** To submit all offers

1. Ensure that no offers are selected on the Offers Tab. Click **Approve**.
2. The Approve Offer Status window opens

***Figure 5–23 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.

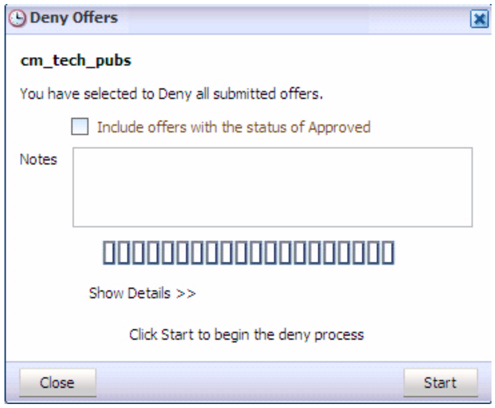
**Rejecting a Single Offer** To reject a single offer

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

***Figure 5–24 Deny Offer Status Window***




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.

## Demand Drivers

Demand Drivers are the attributes that describe how an offer may perform based upon how it is featured in a promotion.

# 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.

## Performance & What-If Options

The following are performance and what–if options:

- What-If—use the What-If feature to create forecast comparisons between two what-if scenarios and your original offer. For more information, see What-If on page 5-23. You also have the ability to enter your own values to predict the forecast. For more information, see "Creating a User Forecast at the Offer Level" on page 5-25.
- Forecast—use forecasting to recalculate predicted demand and update the performance metrics. For more information, see Forecasting on page 5-26.
- 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 5-26.

- Graph—use Graph to view the base and potential performance of a promotion. For more information, see Graph  on page 5-28.

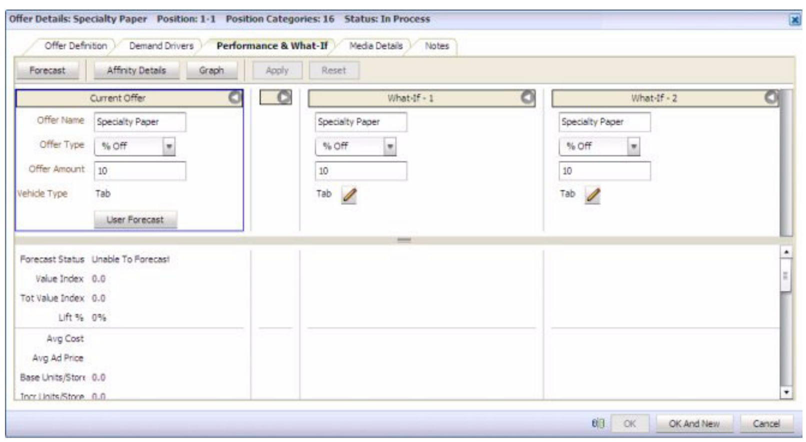
## Viewing the Performance & What-If Screen

The Performance & What-If tab contains four columns. Using the arrow icon located next to the column title, the column can be expanded or collapsed.

- Column 1—your current offer with attributes listed
- Column 2—the system forecast for your offer. This column is collapsed by default but can be expanded using the arrow icon located next to the column title. More details about the use of this column can be found within "Creating a User Forecast at the Offer Level"  on page 5-25.
- Column 3—What-If scenario #1. The attributes listed are identical to those in the current offer.
- Column 4—What-If scenario #2. The attributes listed are identical to those in the current offer.

## What-If

***Figure 5–25 The Performance and What–If Window***

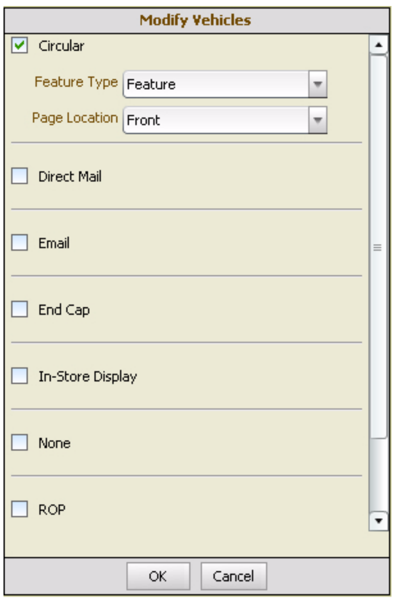



Use the What-If feature to create forecast comparisons between two what-if scenarios and your original offer.

1. From the Offer Details window, select the Performance & What-If tab
2. There are three columns located to the right of the current offer column as follows:
   - System Column—this column is collapsed by default. This column is associated with the User Forecast function. For more information, see "Creating a User Forecast at the Offer Level"  on page 5-25.
   - What–If 1—this column represents what–if scenario number 1. The attribute values for both scenarios are identical to the values you defined for your offer. Modify the attributes of these scenarios to create your What-If comparisons.
   - What–If 2—this column represents what–if scenario number 1. The attribute values for both scenarios are identical to the values you defined for your offer. Modify the attributes of these scenarios to create your What-If comparisons.
3. Change the details in the What-If columns.

- Offer Name
  - Enter a new name for the offer.
- Offer Type
  - Select a different offer type.
- Offer Amount
  - Enter a different amount off, or select a different percent off.
- Vehicle Type
  - Click the Pencil button next to the vehicle type. The Modify Vehicle window opens.

***Figure 5–26 Modify Vehicles Window***




  - Select or clear vehicle types.
  - Click **OK** to update the what-if scenario.

4. (Optional) User Forecast—for more information about this feature, see "Creating a User Forecast at the Offer Level" on page 5-25.
5. Repeat step 3 for what-if scenario 2.
6. Click **Forecast** to update the metrics for the what-if scenario
7. After viewing the forecast metrics,
   - If one of the What-If scenarios meets your requirements, click onto the scenario, and select **Apply**. Your original offer will be updated with the attribute values from the What-If scenario you selected.
   - If neither What-If scenario meets your requirements, select each scenario one at a time, and click **Reset** to reset the attribute values back to the original offer values. Repeat steps 3 through 5 if desired.

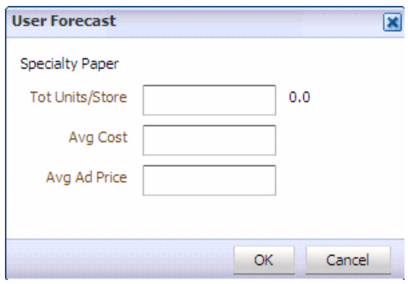
### Creating a User Forecast at the Offer Level

Use this feature to enter your own forecast predictions at the offer level 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. Select the **Current Offer** column.
4. Click **User Forecast**. The User Forecast pop–up box opens as follows:

***Figure 5–27 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.

5. Click **OK**.
6. Click **Forecast** 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.
7. 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.
8. 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.
9. 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. Select the Performance and What–If tab.
3. In the Current Offer column, select the **X** located next to the **User Forecast** button.
4. The metrics in the Current Offer column become blank. The up and down arrows shown in the system column and what–if column are now no longer visible.
5. Click **Forecast** to generate a system forecast based on the original metrics for the offer.

## Affinity Details

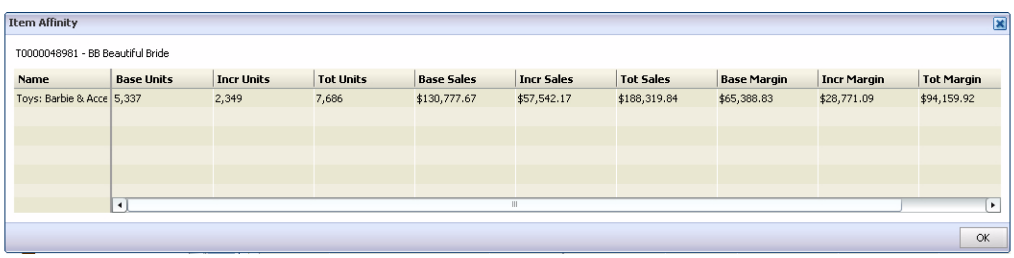
Use the Affinity feature to help design better promotions and to identify the following affinity effects:

- 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 or one of 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 5–28 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. Forecasting 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 Tabs.

- The Vehicle Design tab of the Promotion Manager — using Thumbnail View for All Pages, hover your mouse over an individual page. A pop up opens displaying forecasting information.
- Position Detail Window—open a position on a page within the Vehicle Design tab to view the Position Detail Window.

To forecast performance

1. Click **Forecast** to update the performance metrics for the offer or promotion.
2. The Forecast window opens. The following options are available:
   - Start — click Start to begin the forecast.
   - Options — determine whether you want to refresh the SKUs included in your offer before you begin the forecast.
   - Close — exit the forecast window.
3. After the forecast is complete, you have the option of viewing SKU Details. Select Show/Hide SKU Details to view the details.

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

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

- Not Forecasted — a forecast has never been run.
- Current — a forecast has run successfully.
- Partial—some, but not all SKUs in the offer have a current forecast.
- Unable to Forecast — a forecast cannot be run because the SKUs in the offer either have no predict baseline or no model or all SKUs are marked as Excluded. Open the SKU View to identify the problem SKUs.
- Out of Date — a forecast is out of date because the offer changed.
- 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 at the Offer Level" on page 5-25.

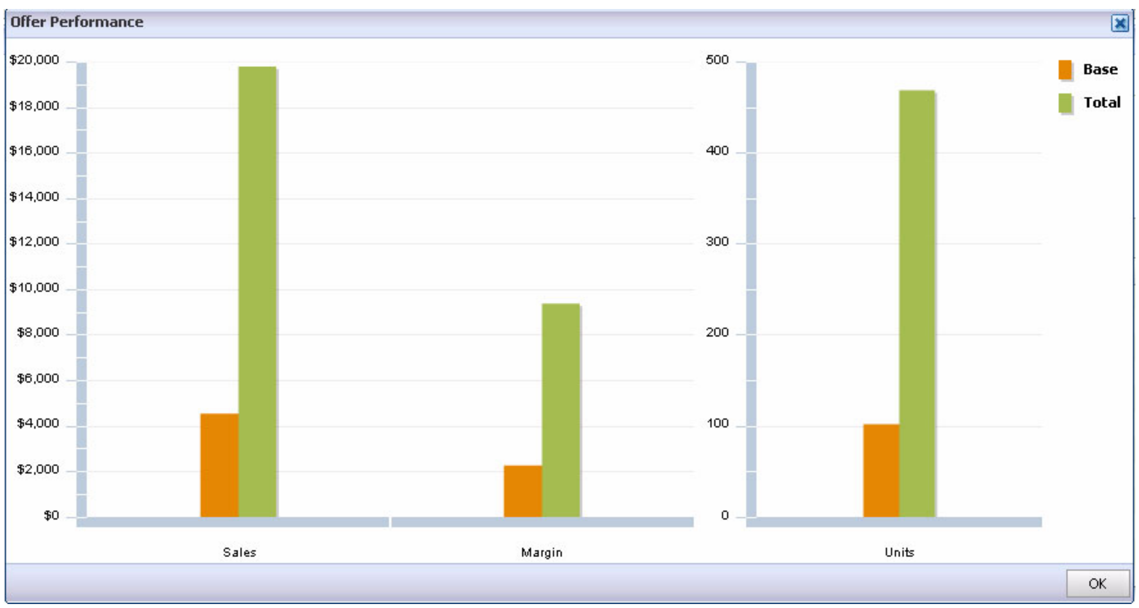
### Graph

Use graphs to view the past and potential performance of a promotion. You can view graphs from the Offers tab of the Promotion Manager, the Performance & What-If tab of the Offer Details window, and the Promotion Performance window within the Vertical Tabs.

To view the promotion performance graph

1. Select either the current offer or one of the what-if scenarios. Click **Graph**. The Promotion Performance window opens with the projected performance of the promotion appearing on graphs.
2. Click **OK** to exit the graph.

***Figure 5–29 Promotion Performance Graph***



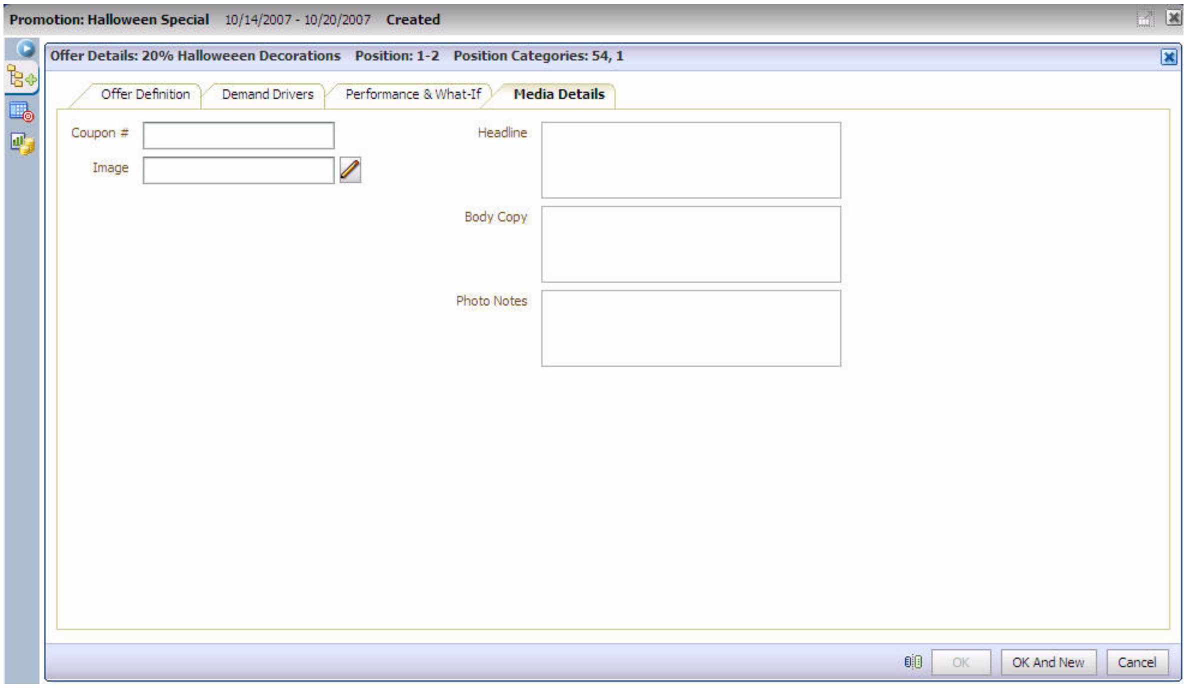

## Media Details

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

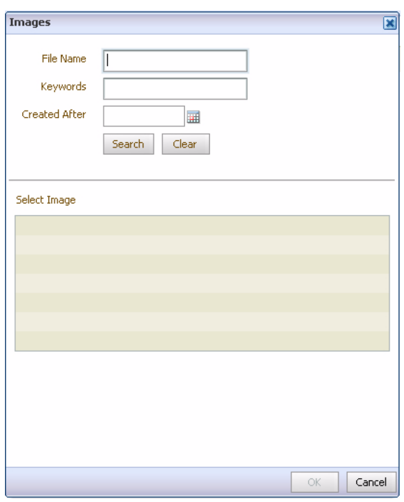
1. From the Offer Details window, select the Media Details tab.

*Figure 5–30 Offer Details 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.

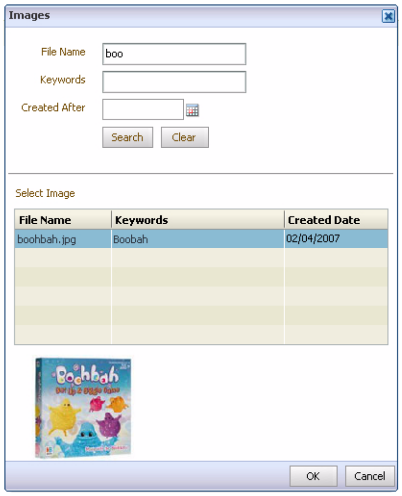
*Figure 5–31 Images Search Window*




   b. Limit the search
      – Filename — enter all or part of the name of the file.
      – Keyword — enter keywords associated with the file.
      – Created After — select a date from the calendar.
   c. Click **Search**. Results appear in the Select Image list.

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

***Figure 5–32 Images Search with Image Selected***




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.

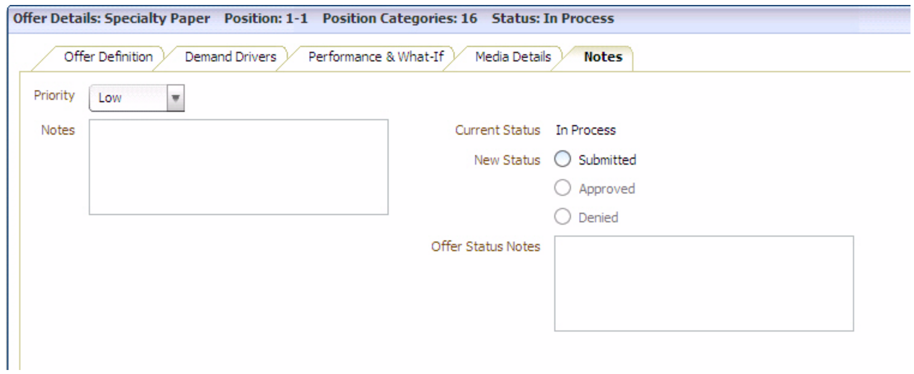
---

4. Enter a headline in the Headline field.
5. Enter Body Copy information.
6. Enter Photo 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 5–33 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. **Offer Status Notes**—enter notes about the offer's status.
6. (Optional) Select another tab from the Offer Details window to enter additional offer information.
7. 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 5-31.

# Vehicle Design

Use Vehicle Design to allocate space for a vehicle and position offers in the space allocated.

A vehicle might be:

- A circular
- A newspaper ad
- Run of Press (ROP)
- Direct mail
- Email

- An in-store display
- An end cap
- A TV ad

## Understanding the Vehicle Design Window

The Vehicle Design window provides you with two options for viewing promotions: List View and Thumbnail View. Within each of these views, options are also available for viewing individual 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. The following information is displayed within the all pages view:

***Table 5–3 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 |
| ROI | Net profit for a particular ad even as a percent of the cost of the ad circular |
| Lift | ((Total Units - Base Units) / Base Units) * 100 |
| Base Sales | Sales (or predicted sales) generated by the focus item during the baseline period. |
| Incr Sales | Incremental Sales. Additional (or predicted additional) sales generated by the focus item, measured from the baseline period to the ad event. |
| Total 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 | Incremental Margin. |
| Total Margin | Sum of Total Margin for all positioned offers on the page |

### List View - Single Page

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

***Table 5–4 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 Name |
| Position | Position Name |
| 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 5-40. |

***Table 5–4 (Cont.) Vehicle Design List View — Single Page***

| Field | Description |
|---|---|
| Category Name | Name of the category assigned to the position. If there are multiple categories assigned, only the first will be shown. 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 Offer" link is available. |
| Offer | Amount and type of offer is shown. |
| Notes | Notes from the position details or offer. |

### Thumbnail View - All Pages

Use Thumbnail view to view your all pages within your vehicle in a graphical format. The following viewing options are available:

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

### Vehicle Design Legend

Available within Thumbnail 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.
  - Read Only — gray.
  - Unallocated — shaded white.
  - Selected Category — outlined in red.

*Figure 5–34 Vehicle Design Legend*


### Informational Popups

In Thumbnail 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.

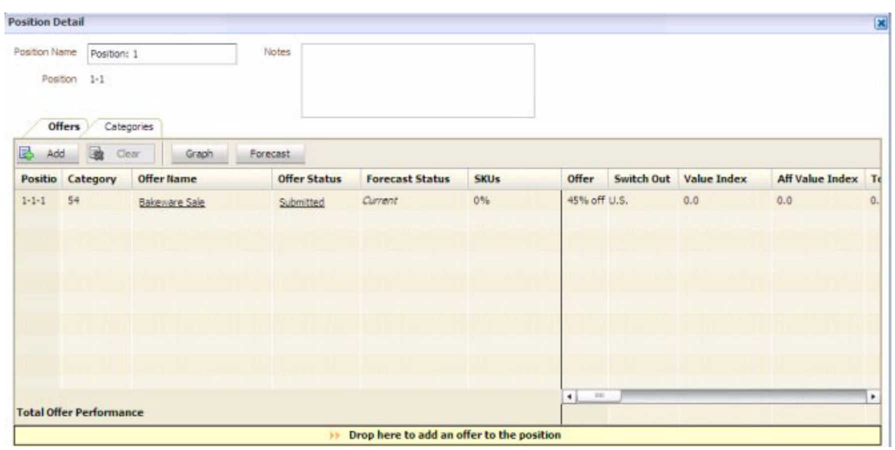
## Understanding Vehicle Positions

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

### Position Details Window

The Position Details window displays two tabs: Offers and Categories. 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. For more information, see Assigning Categories to Vehicle Positions on page 5-42 and Positioning Offers within a Vehicle on page 5-43.

*Figure 5–35 Position Details Window with the Offer Tab Selected*




The Position Details window displays the following information:

*Table 5–5 Position Details — Available Information*

| Field | Description |
|---|---|
| Position Name | Enter a name for the position |
| Position | For a selected position, displays the page and position # on the page. |
| Notes | Enter notes for the position |

### Offers

Use this tab to assign offers to the position. Offers already assigned to the position displays the information described in Table 5-6. For more information, Positioning Offers within a Vehicle on page 5-43.

*Table 5–6 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 |

Additional offer related information is also available. Refer to " Offers Tab — Individual Offer Details and Metric Definitions" on page 5-12.

### Categories

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 5-42.

*Table 5–7 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) |

## Managing Vehicle Pages

Use the following steps to view, reorder, add, and remove pages from a vehicle.

### Viewing Pages in a Vehicle

To view pages in a vehicle

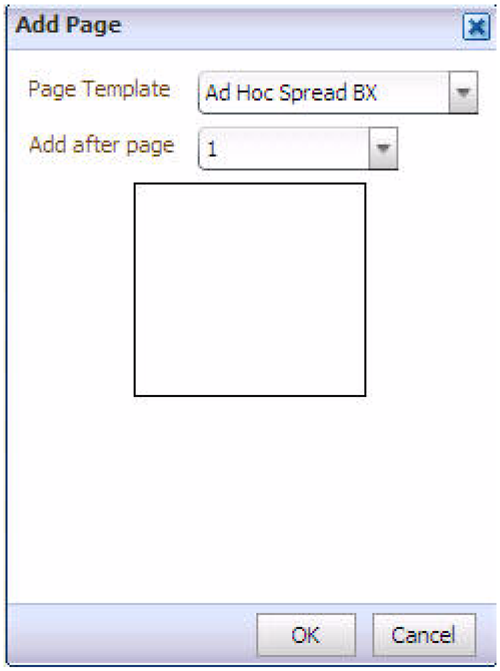
1. List View — Select “All Pages” or individual page numbers from the Page List drop-down menu.
2. Thumbnail View — Select “All Pages” or individual page numbers from the Page List drop-down menu. Use the “# of Pages Across” drop down menu to make additional adjustments.

### Adding Pages to a Vehicle

To add pages to a vehicle

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

*Figure 5–36 Vehicle Design Add Page Window*




2. Select the template to use for the page from the Page Template field.
3. Select where to add the page to the vehicle from the Add after page field.
4. 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

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

### Deleting a Vehicle Page

To delete pages from a vehicle

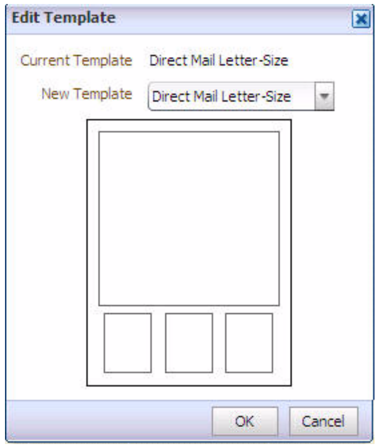
1. Using List View, select the desired page from the list of pages within the vehicle design window.
2. Click **Delete**. The Confirm window opens.
3. Click **OK**. The page is removed from the vehicle.

### Editing a Vehicle Page Template

To edit a vehicle page template

1. Using List or Thumbnail view, select the desired page.
2. Click **Edit Template**. The Edit Template window opens.

***Figure 5–37 Vehicle Design Edit Template Window***




3. Select a template from the New Template field.
4. Click **OK**.

---

**Note:** If you change templates, you will lose all your previous work including the assignment of categories and the placement of offers.

---

## 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: Editing Page Layout Using Layout View or Editing Page Layout Using List View.

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 in single user mode so that it is locked 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.

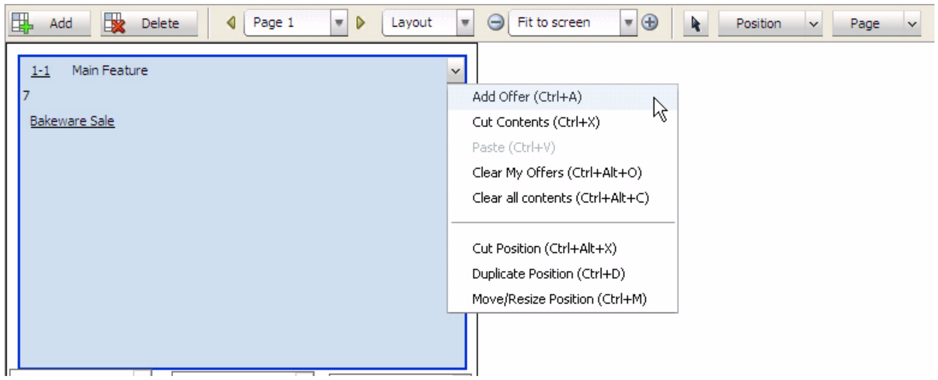
---

### 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.

**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 5–38 Layout View—Toolbar Options*




**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.
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.

**Adding Page Positions** To add a position to a page in layout view

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

**Copying, Cutting, and Pasting Page Positions** From each page position, a drop-down menu is available that allows you to copy, cut, and paste page positions.

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

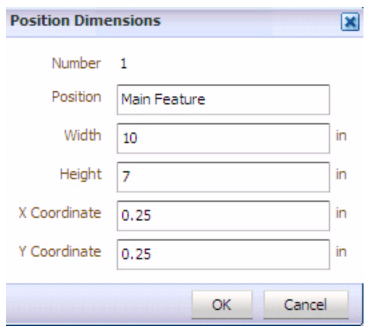
**Duplicating Page Positions** To duplicate a page position:

1. Select a position.
2. In the upper right corner of the selected position, click onto the drop–down menu.
3. Select **Duplicate Position**.
4. A new position with the same dimensions as the original position is placed in the upper left corner of the page.
5. Click **Apply** to save your changes.

**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 5–39 Position Dimensions Window***

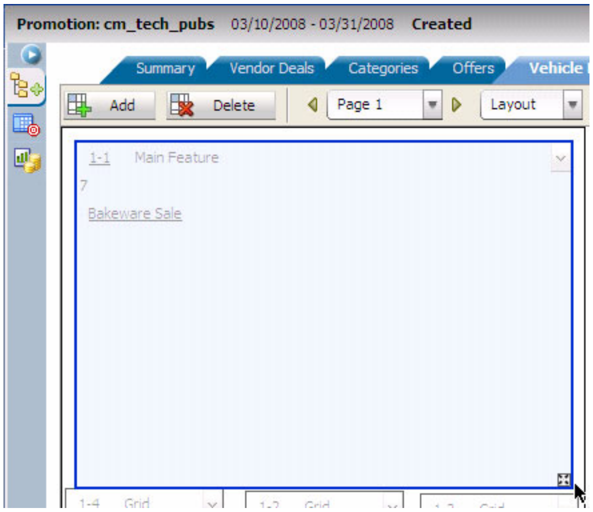



5. Enter the following:
   - Width—enter the width of the position in inches
   - Height—enter the height in inches of the position
   - X Coordinate (optional)
   - Y Coordinate (optional)
6. Click **OK**. The new position is added to the page.
7. Click **Apply** to save your changes.

**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 5–40 Resize Position Drag Handles*




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.

**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.

## 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.

*Figure 5–41 Editing Page Layout in List View—Position Menu, Page Menu & Arrow Icon*

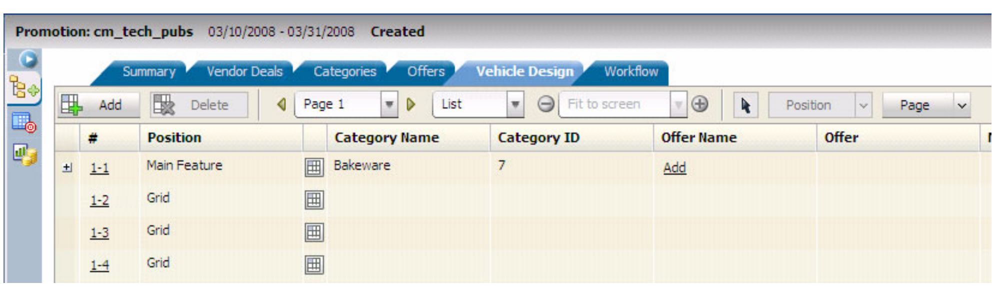
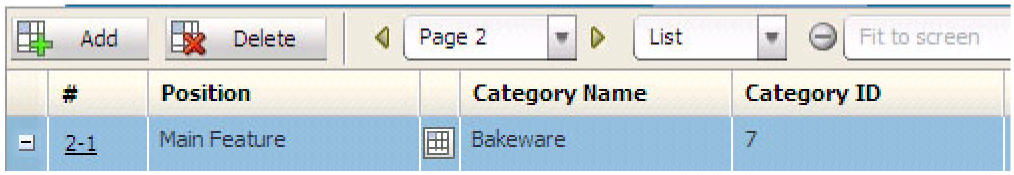


*Figure 5–42 Editing Page Layout in List View—Close Up of Position Menu Grid*




**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. Click once onto the Position menu. 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 Page menu within the toolbar, select **Paste Position**.
5. Click **Apply** to save your changes.

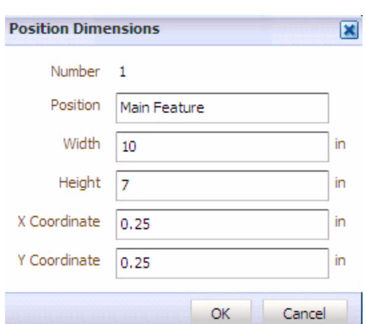
**Duplicating Page Positions** To duplicate a page position in list view

1. Select a position by clicking once into its row.
2. Click onto the Position menu. Select **Duplicate Position**.
3. A new position is added to the bottom of the list.
4. Click **Apply** to save your changes.

**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. Click once onto the Position menu and select Move/Resize Position.
3. The Position Dimensions window opens as follows:

*Figure 5–43 Position Dimensions Window*




4. Enter the following:
   - Name

- Width
- Height
- X Coordinate
- Y Coordinate

5. Click **OK**. The new position is added to bottom of the list.
6. Click **Apply** to save your changes.

**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.

## 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

Use the procedures below 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 Thumbnail 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 5-9 for more information.

***Figure 5–44 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.

---

### Positioning Offers within a Vehicle

You have a number of options for positioning offers within a vehicle. You can position existing offers from the merchandise selector or create and position new offers. Multiple offers can be assigned to the same position. More information regarding these options is available below.

#### 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 Thumbnail 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 Selector.
4. Select **Offers** from the Browse field. Two types of offers appear:
   - Positioned — Offers already assigned to a position in the vehicle. These offers may be positioned again.
   - 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 selector 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

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 Offer” link available within the “Offer Name” column. Select the link from row of the desired position/segment to add an offer.
   - In Thumbnail 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 5-14.

### Cutting, Pasting, and Clearing Offers

Using Thumbnail 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. In the Vehicle Designer, change to Thumbnail View.
2. 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 — 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 — clear the category and offer(s) in a position.
   - Clear All Offers — clears the offer(s) for the selected position.
3. Within Thumbnail View, 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.

## Workflow

Use the workflow tab to create and administer the schedule for the promotion. 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. Standard phases include:

- Created
- Planning
- Running
- Completed

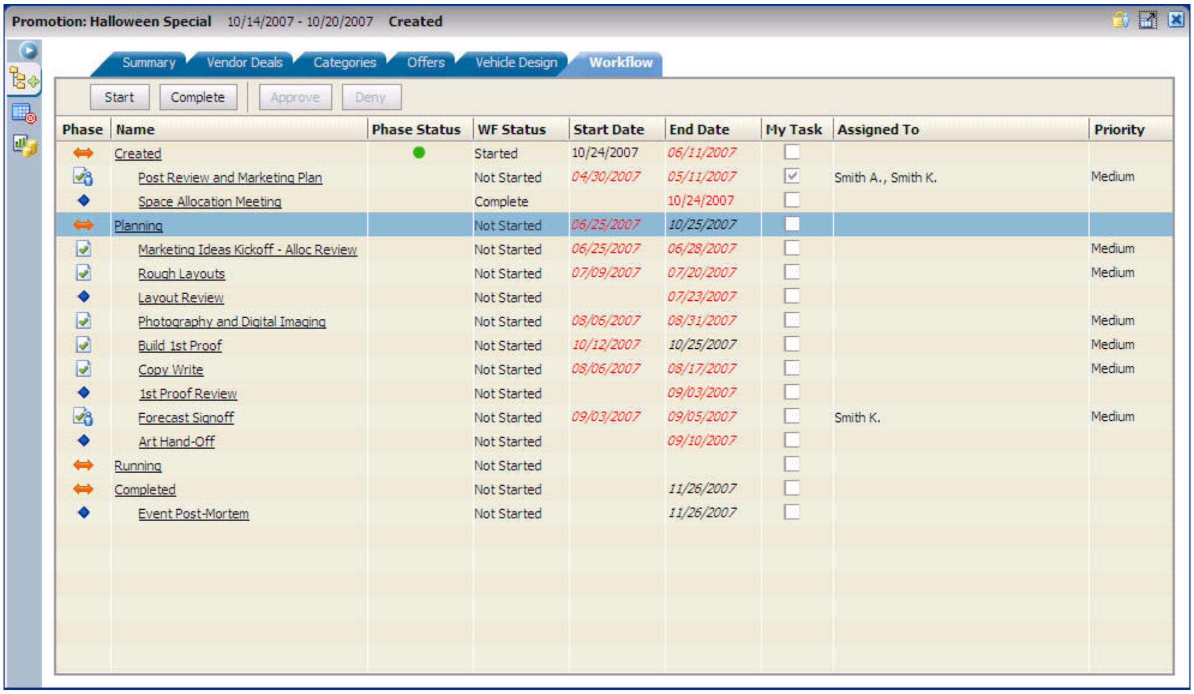
Tasks and milestones can be added as part of any phase.

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

To add a task to the workflow

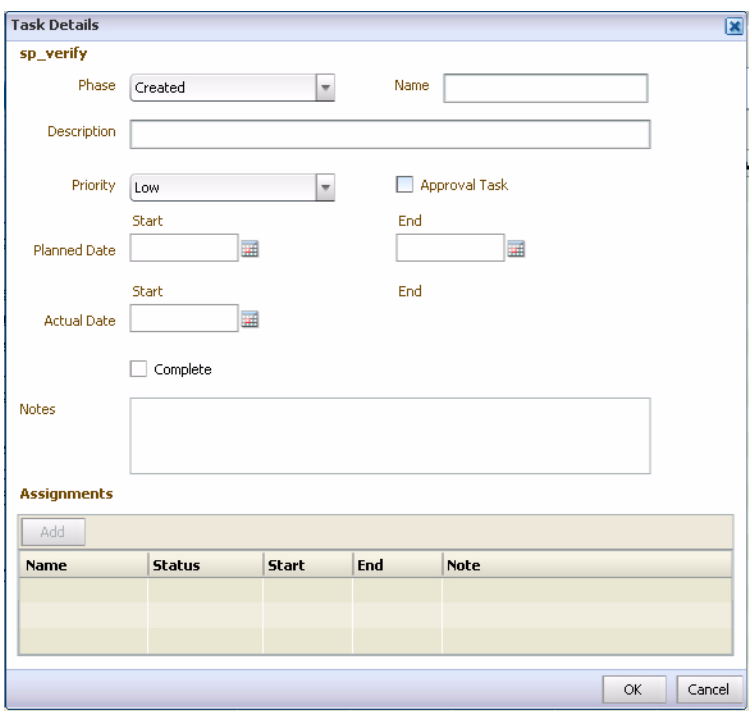
1. Select the Workflow tab from Promotion Manger. The Workflow window opens.

*Figure 5–45 Promotion Manager Workflow Tab*




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

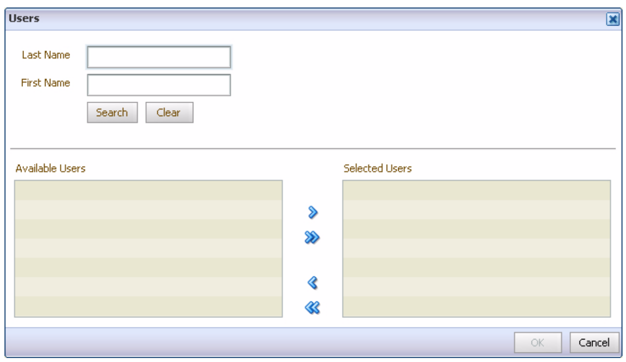
*Figure 5–46 Task Details Window*




4. Select the phase that the task is a part of from the Phase field.

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

***Figure 5–47 Users Search Window***

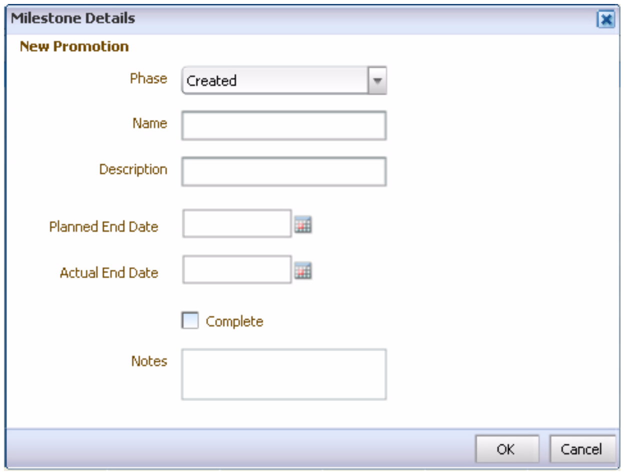



    b. Limit the search.
        – Last Name — enter all or part of a last name.
        – First Name — enter all or part of a first name.
    c. Click **Search**. The users matching the search criteria appear in the Available Users list.
    d. Select the necessary subsets from the Available list.
    e.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

To add a milestone to the workflow

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

***Figure 5–48 Milestone Details Window***

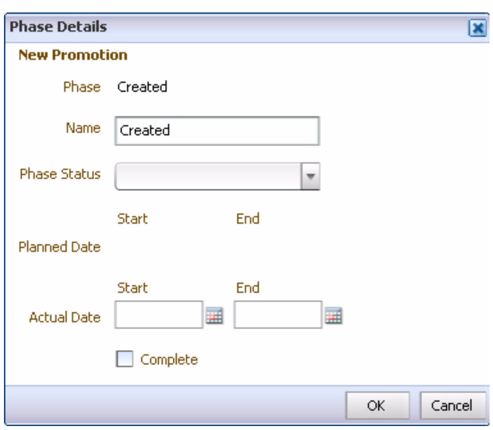



3. Select the phase that the milestone is a part of from the Phase field.
4. Enter a name for the milestone in the Name field.
5. Enter details of the milestone in the Description field.
6. Enter when the milestone should be achieved by in the Planned End Date field.
7. Select Complete or enter the actual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

To edit phase details

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

***Figure 5–49 Phase Details Window***




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

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

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

To remove a task or milestone from the workflow

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

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

## Starting Phases or Tasks

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

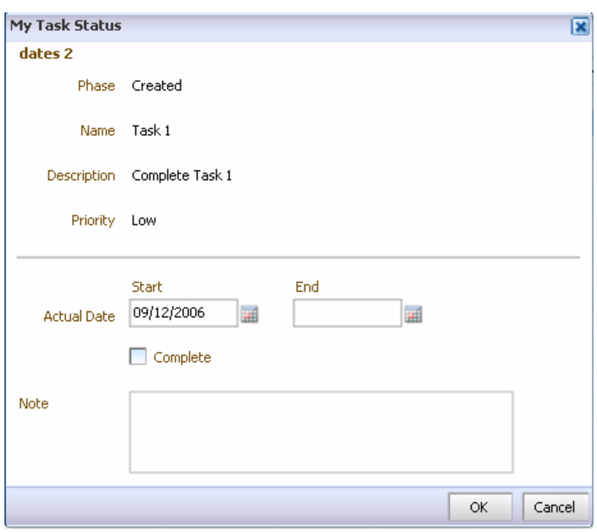
To start a phase or task

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

To begin a task assigned to you

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

***Figure 5–50 My Task Status Window***



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

## Completing Phases, Tasks, or Milestones

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

To complete a phase or task

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

To complete an assigned task

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

To complete a milestone

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

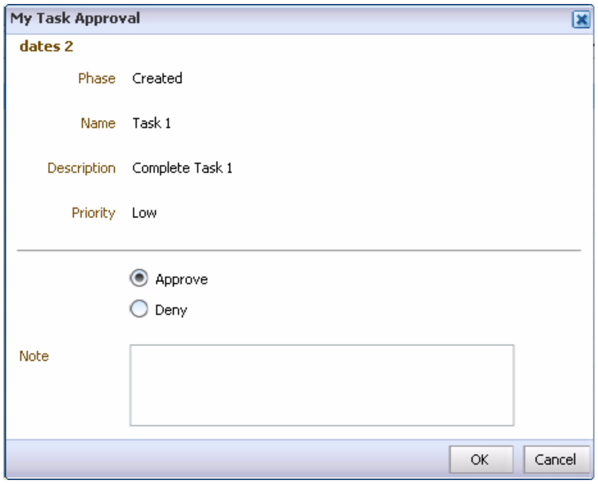
## Approval Tasks

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

To approve a task

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

*Figure 5–51 My Task Approval Window*

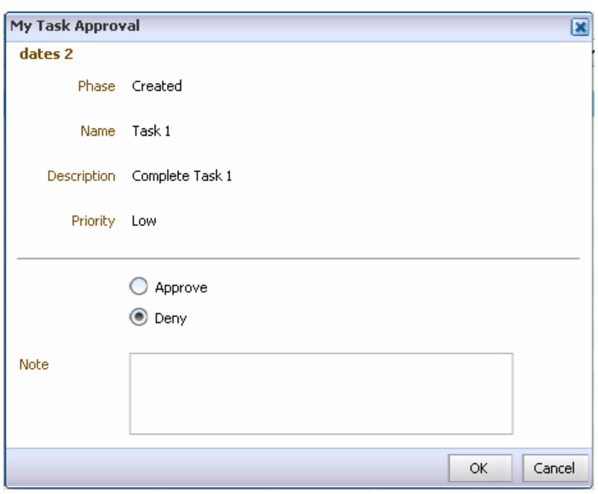



3. Select **Approve**.
4. Enter descriptive information about the approval in the Note field.
5. Click **OK**.
6. The status of the task changes to Complete with the current date appearing in the Start and End fields. If there is more than one assigned user on a task, the status will change to Complete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

To deny a task

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

*Figure 5–52 My Task Approval Window*




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

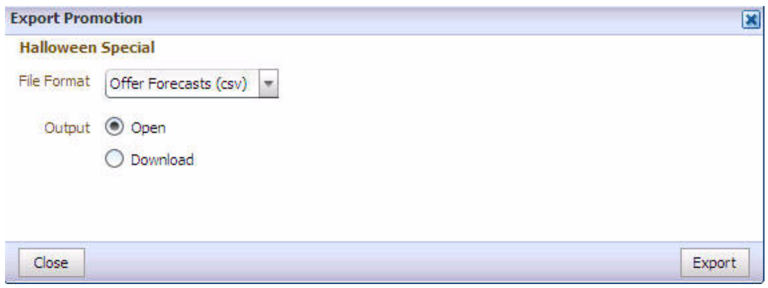
## Export

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

To export a promotion

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

***Figure 5–53 Export Promotion Window***




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

# Glossary

### Affinity

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

### Campaign

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

### Cannibalization

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

### Event

Activities relevant to the promotional calendar.

### Forecast

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

### Offer

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

### Promotion

Individual events or advertising you use to drive increased sales.

### Promotion Calendar

The promotion events planned for a period of time.

### Vehicle

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

### What-if

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

### Workflow

The customizable path taken in the design of a promotion.

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