

**Oracle® Retail Promotion Planning and
Optimization**

User Guide

Release 13.1.1

September 2009

Copyright © 2009, Oracle and/or its affiliates. All rights reserved.

Primary Author: Anirudha Accanoor

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this software or related documentation is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable:

U.S. GOVERNMENT RIGHTS Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are "commercial computer software" or "commercial technical data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, duplication, disclosure, modification, and adaptation shall be subject to the restrictions and license terms set forth in the applicable Government contract, and, to the extent applicable by the terms of the Government contract, the additional rights set forth in FAR 52.227-19, Commercial Computer Software License (December 2007). Oracle USA, Inc., 500 Oracle Parkway, Redwood City, CA 94065.

This software is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications which may create a risk of personal injury. If you use this software in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure the safe use of this software. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software in dangerous applications.

Oracle is a registered trademark of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

This software and documentation may provide access to or information on content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.

Value-Added Reseller (VAR) Language

Oracle Retail VAR Applications

The following restrictions and provisions only apply to the programs referred to in this section and licensed to you. You acknowledge that the programs may contain third party software (VAR applications) licensed to Oracle. Depending upon your product and its version number, the VAR applications may include:

(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, Oracle Retail Demand Forecasting, Oracle Retail Regular Price Optimization, Oracle Retail Size Profile Optimization, Oracle Retail Replenishment Optimization 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 Mobile Store Inventory Management.

(v) the software component known as **Crystal Enterprise Professional and/or Crystal Reports Professional** licensed by SAP 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.

(ix) the software component known as **DataBeacon™** developed and licensed by Cognos Incorporated of Ottawa, Ontario, Canada, to Oracle and imbedded in the Oracle Retail Value Chain Collaboration application.

You acknowledge and confirm that Oracle grants you use of only the object code of the VAR Applications. Oracle will not deliver source code to the VAR Applications to you. Notwithstanding any other term or condition of the agreement and this ordering document, you shall not cause or permit alteration of any VAR Applications. For purposes of this section, "alteration" refers to all alterations, translations, upgrades, enhancements, customizations or modifications of all or any portion of the VAR Applications including all reconfigurations, reassembly or reverse assembly, re-engineering or reverse engineering and recompilations or reverse compilations of the VAR Applications or any derivatives of the VAR Applications. You acknowledge that it shall be a breach of the agreement to utilize the relationship, and/or confidential information of the VAR Applications for purposes of competitive discovery.

The VAR Applications contain trade secrets of Oracle and Oracle's licensors and Customer shall not attempt, cause, or permit the alteration, decompilation, reverse engineering, disassembly or other reduction of the VAR Applications to a human perceivable form. Oracle reserves the right to replace, with functional equivalent software, any of the VAR Applications in future releases of the applicable program.

Contents

Preface	xiii
Audience	xiii
Related Documents	xiii
Customer Support	xiii
Review Patch Documentation	xiv
Oracle Retail Documentation on the Oracle Technology Network	xiv
Conventions	xiv
 1 Getting Started	
About Oracle Retail Promotion Planning and Optimization	1-1
Features	1-1
Users	1-2
Tasks	1-2
Logging on to Promotion Planning and Optimization	1-2
 2 Navigation	
Calendar	2-1
Calendar Toolbar and Controls	2-1
Calendar Views	2-1
Creating Items from the Calendar	2-2
Creating Campaigns	2-2
Creating Events from the Calendar	2-3
Creating Promotions from the Calendar	2-4
Removing Items from the Calendar	2-4
Viewing Calendar Entries	2-5
Navigator	2-5
Calendar	2-5
Documents	2-6
Viewing an Open Document	2-6
To Do	2-6
My Approvals	2-7
Viewing Approvals	2-7
Making Approvals	2-7
Denying Approvals	2-8
My Tasks	2-8

Working on Assigned Tasks.....	2-8
Starting Assigned Tasks.....	2-9
Completing Tasks	2-10
Setup.....	2-10
Reports	2-10
The Vertical Tab: Hierarchies Selector, Target Allocation, and Promotion Performance.....	2-11
Hierarchies Selector	2-11
Merchandise Hierarchy.....	2-12
Managing Merchandise	2-13
Like Items	2-14
Creating Like Item Associations.....	2-14
Removing Like Item Associations.....	2-14
Target Allocation.....	2-15
Promotion Performance	2-15

3 Templates

Page Templates.....	3-1
Viewing Page Templates.....	3-1
Creating a New Page Template.....	3-2
Summary Tab	3-3
Positions Tab.....	3-3
Adding a Position to a Page	3-4
Removing a Position from a Page	3-4
Creating Copies of a Position.....	3-4
Using Drag and Drop to Set Position Block Dimension and Position Using Layout View	3-4
Manually Setting Position Block Dimension and Position Using Layout View.....	3-4
Manually Setting Position Block Dimension and Location Using List View.....	3-5
Deactivating a Page Template	3-5
Vehicle Templates.....	3-5
Viewing Vehicle Templates	3-6
Creating New Vehicle Templates	3-6
Summary Tab	3-7
Versions Tab	3-7
Vehicle Design Tab	3-8
Viewing Vehicle Template Designs	3-9
Viewing the Vehicle Template Design Versions	3-9
Adding Pages to a Vehicle Template	3-10
Removing Pages from a Vehicle Template	3-11
Modifying Vehicle Templates	3-11
Moving a Page in List or Layout View	3-11
Changing Page Template Assignment	3-11
Promotion Templates.....	3-12
Viewing Promotion Templates	3-12
Creating a Promotion Template.....	3-13
Summary Tab.....	3-13
Versions Tab.....	3-14

Vehicles Tab	3-15
Adding Vehicles	3-15
Deleting Vehicles	3-15
Workflow Tab	3-16
Phases	3-16
Changing Phase Names	3-16
Tasks	3-17
Adding Tasks	3-17
Modifying Tasks	3-18
Editing Existing Task Details	3-18
Removing Tasks	3-19
Milestones	3-19
Adding a Milestone	3-19
Modifying a Milestone	3-19
Removing a Milestone	3-20

4 Campaigns and Events

Campaigns	4-1
Creating Campaigns from the Calendar	4-1
Creating Campaigns from the Navigator	4-2
Events	4-2
Creating an Event from the Calendar	4-3
Creating an Event from the Navigator	4-4

5 Promotions

Creating Promotions	5-1
Creating Promotions from the Calendar	5-1
Creating Promotions from the Navigator	5-3
Opening an Existing Promotion	5-3
Explicit Locking	5-4
The Promotion Manager	5-5
Summary	5-5
Adding Versions	5-6
Adding Locations Using the Location Hierarchy	5-6
Adding Locations	5-7
Overriding Store Counts for Locations	5-7
Removing Locations	5-8
Adding Locations Using Store Sets	5-8
Adding Store Sets	5-8
Overriding Store Counts for Store Sets	5-9
Removing Store Sets	5-9
Vehicles	5-9
About the Vehicles Tab	5-9
About the Vehicle Details Window	5-10
Adding Vehicles	5-11
Removing Vehicles	5-12

Vendor Deals	5-12
Adding a Vendor Deal	5-12
Deleting a Vendor Deal	5-15
Categories.....	5-15
About the Categories Tab	5-15
Adding Categories to a Promotion.....	5-15
Deleting Categories from a Promotion	5-16
Offers	5-17
About the Offers Tab	5-17
Offers Tab Menu Options	5-18
Filters	5-18
Offer Metrics.....	5-19
Forecast Confidence Indicator	5-19
The Offer Details Window	5-20
Filters	5-21
Adding An Offer	5-22
Creating a Buy One Get One (BOGO) Offer	5-24
Creating BOGO's Using Categories of Items	5-24
Creating BOGO's Using SKU Lists	5-25
Editing an Existing Offer.....	5-26
Deleting An Offer	5-27
Working with Offer Versions	5-27
Viewing Offer Vehicle Versions.....	5-27
Including/Excluding an Offer Version	5-28
Modifying an Offer Version	5-29
Price Versioning	5-30
Computing Prices for a Single Version.....	5-30
Computing Prices for All Versions	5-30
Submitting, Approving, and Rejecting Offers	5-30
About Offer Status	5-30
The Offer Status Window	5-31
Required Criteria to Submit an Offer.....	5-32
Submitting An Offer	5-32
Submitting an Offer Directly from the Offers Tab	5-32
Submitting a Single Offer Using the Offer Status Window	5-32
Submitting All Offers	5-32
Approving An Offer	5-33
Approving a Single Offer from the Offers Tab.....	5-33
Approving a Single Offer Using the Offer Status Link	5-33
Approving All Offers	5-34
Rejecting An Offer	5-34
Rejecting a Single Offer	5-34
Rejecting All Offers.....	5-35
Performance & What-If	5-35
About the Performance & What-If Screen	5-36
Viewing the Performance and What-If Screen.....	5-36
Setting Up What-If Scenarios.....	5-37

Using the Value Index to Optimize Offers	5-38
Performing a What-If Analysis	5-38
Creating a User Forecast	5-40
Removing a User Forecast	5-41
Performing What-If Analysis with Offer Versions.....	5-42
Enabling/Disabling Versions	5-42
Modifying Version Properties	5-42
Affinity Details	5-42
Forecasting	5-43
About Forecasting.....	5-43
Forecasting Offers	5-43
Forecast Statuses	5-45
Graph	5-46
Graph Types	5-46
Viewing Graphs	5-47
Showing/Hiding Graph Metrics	5-48
Printing Graphs	5-48
Media Details	5-49
Notes	5-51
Adding Notes to a New Offer	5-51
Adding Notes to an Existing Offer	5-51
Export	5-52

6 Vehicle Design

Understanding the Vehicle Design Window	6-1
List View—All Pages	6-2
List View—Single Page	6-2
Thumbnail View—All Pages	6-3
Vehicle Design Legend.....	6-3
Informational Pop-ups	6-4
Layout View—Single Page	6-4
Chart View—All Pages.....	6-4
Viewing Vehicle Versions	6-5
Understanding Vehicle Positions	6-5
Position Details Window	6-5
Offers within the Position Details Window	6-6
Categories within the Position Details Window	6-7
Media Details in the Position Details Window	6-7
Managing Vehicle Pages	6-8
Viewing Pages in a Vehicle.....	6-8
Adding Pages to a Vehicle	6-9
Reordering Pages in a Vehicle.....	6-9
Deleting a Vehicle Page.....	6-9
Editing a Vehicle Page.....	6-10
Managing Vehicle Page Positions	6-10
Editing Page Layout Using Layout View	6-11
Toolbar Options	6-11

Dragging and Dropping Page Positions	6-11
Editing Page Layout Using List View	6-12
About Editing Page Layout in List View	6-12
Adding Page Positions	6-12
Cutting Page Positions	6-12
Duplicating Page Positions	6-12
Moving or Resizing Page Positions	6-12
Deleting Page Positions	6-13
Adding Page Positions	6-13
Cutting and Pasting Page Positions	6-13
Duplicating Page Positions	6-14
Moving/Resizing Positions: Using the Position Dimensions Pop-Up	6-14
Moving/Resizing Positions: Using the Toolbar Arrow	6-14
Deleting Page Positions	6-15
Managing Vehicle Page Position Content	6-15
Assigning Categories to Vehicle Positions	6-16
Cutting, Pasting, and Clearing Offers	6-16
Positioning Offers within a Vehicle	6-17
Placing an Existing Offer into a Position	6-17
Create and Position a New Offer	6-17
Clearing an Offer from a Position	6-17

7 Workflow

About Workflow	7-1
Adding a Task	7-1
Adding a Milestone	7-3
Removing Tasks or Milestones	7-4
Starting Phases or Tasks	7-4
Editing Phase Details	7-5
Completing Phases, Tasks, or Milestones	7-6
Completing a Phase or Task	7-6
Completing an Assigned Task	7-6
Completing Milestones	7-6
Un-Starting a Task	7-6
Un-Starting an Approval Task	7-6
Approving and Denying Tasks	7-7
Approving a Task	7-7
Denying Tasks	7-7

A Performance Metrics

Categories—Individual Category Metrics	A-1
Categories—Total Category Performance Metrics	A-3
Offers—Individual Offer Performance	A-5
Offers—Total Offer Performance	A-6
Offers—Offer Details Window—Get or Buy SKU View	A-8
The Vertical Tab—Promotion Performance Metrics	A-10
Vehicle Design—List View—All Pages View	A-12

Vehicle Design—Thumbnail View—All Pages—Individual Page Mouseover	A-13
Vehicle Design—List View—Single Page Metrics.....	A-13
Vehicle Design—Layout View—Single Page Metrics Page Mouseover.....	A-15
Performance & What-If Metrics	A-15
Vehicle Design—Position Detail Window—Offers Tab—Individual Offer Performance	A-17

Glossary

Index

Preface

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

Audience

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

Related Documents

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

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

Customer Support

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

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

When contacting Customer Support, please provide the following:

- Product version and program/module name

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

Review Patch Documentation

If you are installing the application for the first time, you install either a base release (for example, 13.0) or a later patch release (for example, 13.0.2). If you are installing a software version other than the base release, be sure to read the documentation for each patch release (since the base release) before you begin installation. Patch documentation can contain critical information related to the base release 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 (with the exception of the Data Model which is only available with the release packaged code):

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

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

Conventions

The following text conventions are used in this document:

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

Getting Started

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

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

- [About Oracle Retail Promotion Planning and Optimization](#) on page 1-1.
- [Logging on to Promotion Planning and Optimization](#) on page 1-2.

About Oracle Retail Promotion Planning and Optimization

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

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

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

Features

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

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

Users

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

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

Tasks

Promotion Planning and Optimization assists in:

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

Logging on to Promotion Planning and Optimization

To access Promotion Planning and Optimization:

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

Figure 1–1 Login Window



ORACLE
RETAIL

Username:

Password:

Login

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.

Navigation

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

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

Calendar

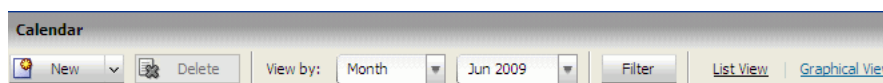
The calendar is your starting point in Promotion Planning and Optimization. It allows you to view all the promotions and events for the week, month, quarter or year and highlight specific types of events. Use the calendar to plan and define details for promotions, campaigns, and events.

Calendar Toolbar and Controls

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

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

Figure 2–1 The Calendar Toolbar

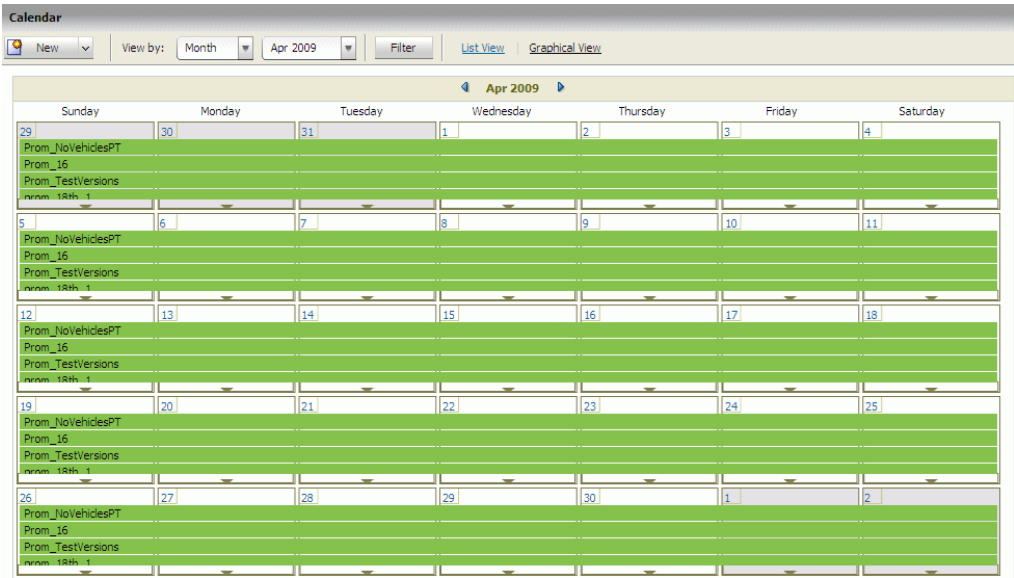


Calendar Views

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

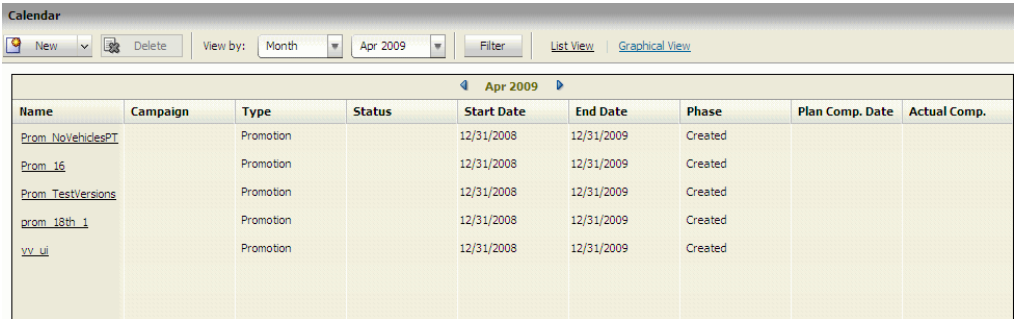
- Select Graphical View to view the calendar in a traditional calendar format (as shown below).

Figure 2–2 Calendar Graphical View



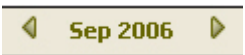
- Select List View to view the Calendar as a list of entries in table format.

Figure 2–3 Calendar List View



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

Figure 2–4 Next/Previous Month Arrows



Creating Items from the Calendar

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

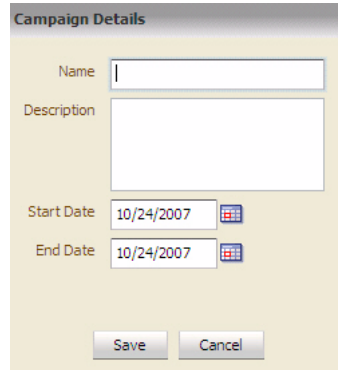
Creating Campaigns

To create a campaign from the calendar:

1. Click **New**.
2. Select **Campaign**.

3. The Campaign Details window opens to the right of the Calendar.

Figure 2–5 The Campaign Details Window

The screenshot shows a window titled "Campaign Details". It contains a "Name" text box, a "Description" text area, a "Start Date" date picker set to 10/24/2007, and an "End Date" date picker also set to 10/24/2007. At the bottom are "Save" and "Cancel" buttons.

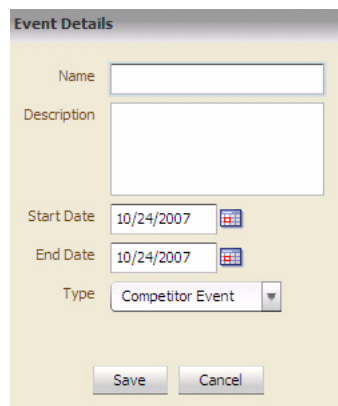
4. **Name**—enter a name for the Campaign.
5. **Description**—enter a description.
6. **Start Date**—enter a start date.
7. **End Date**—enter an end date.
8. Click **Save**.

Creating Events from the Calendar

To create an event from the calendar:

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

Figure 2–6 Event Details Window

The screenshot shows a window titled "Event Details". It contains a "Name" text box, a "Description" text area, a "Start Date" date picker set to 10/24/2007, and an "End Date" date picker also set to 10/24/2007. Below these is a "Type" dropdown menu with "Competitor Event" selected. At the bottom are "Save" and "Cancel" buttons.

4. **Name**—enter a name for the event.
5. **Description**—enter a description.
6. **Start Date**—enter a start date.
7. **End Date**—enter an end date.
8. **Type**—select an event type from the following options:

- **Competitor**—create an event that reflects a competitor's event.
 - **Company**—create an event that reflects a company event.
 - **Personal**—create an event that reflects a personal event.
9. Click **Save**.

Creating Promotions from the Calendar

To create a promotion from the calendar:

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

Figure 2–7 The Promotion Details Window

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

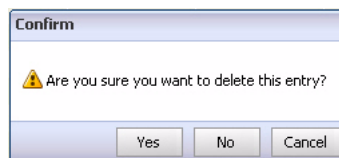
Removing Items from the Calendar

To remove an item from the calendar:

1. Select the row (list view) or icon (graphical view) of the event to remove.

2. Click **Delete**. The Confirm window opens.

Figure 2–8 Confirm Delete Window



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

Viewing Calendar Entries

To view entries by a different time period:

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

To view certain types of events only:

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

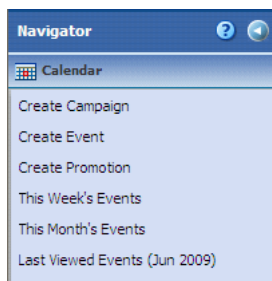
Navigator

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

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

Calendar

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

Figure 2–9 The Calendar Section of the Navigator

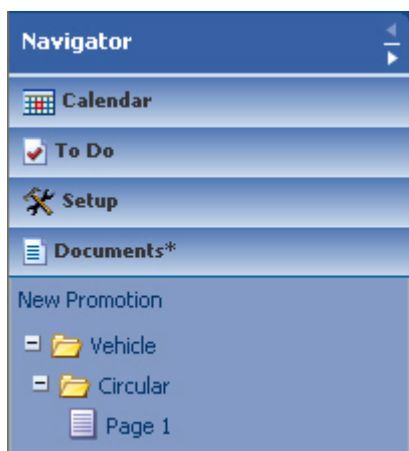
- Use the "Create" links to quickly create promotional items.
- Use the event short cut links to view the current week or month's events.

Documents

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

Viewing an Open Document

To view an open document:

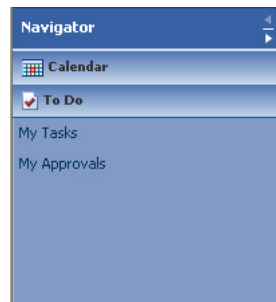
Figure 2–10 Navigator Documents Section

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

To Do

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

Figure 2-11 The To Do Section of the Navigator



My Approvals

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

Viewing Approvals

To view your approvals:

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

Figure 2–12 *My Approvals Window*

[illegible]

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

Making Approvals

To make an approval:

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

Figure 2–13 My Task Approve Window

My Task Approve

tdemo_promotion

Phase Planning

Name Marketing Approval

Description Marketing Approval

Priority Low

Note

OK Cancel

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

Denying Approvals

To deny an approval:

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

My Tasks

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

Working on Assigned Tasks

To work on your tasks:

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

Figure 2–14 *My Tasks Window*

[illegible]

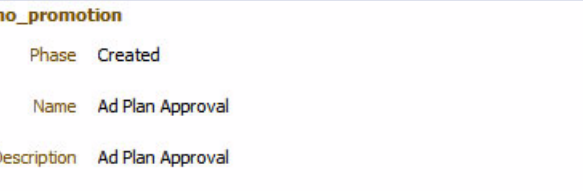
2. From the Promotion column, select the link of the promotion you want to work on. The appropriate promotion document opens in Promotion Manager with the Workflow window open.

Starting Assigned Tasks

To start an assigned task:

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

Figure 2–15 *My Task Start Window*



My Task Start

tdemo_promotion

Phase Created

Name Ad Plan Approval

Description Ad Plan Approval

Priority High

Note

OK Cancel

- Note**—enter additional descriptive or instructional information.
- Click **OK**. The Workflow tab of the promotion is displayed. The status of the task changes to Started.

Completing Tasks

To complete a task:

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

Setup

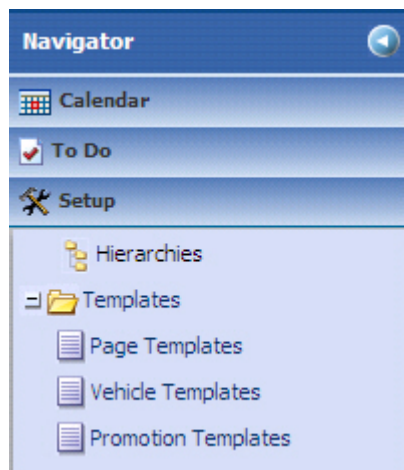
The Setup section lets you manage merchandise, view and edit available templates, and create new templates.

The following templates are available:

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

See [Templates](#) for more information on creating and editing templates.

Figure 2–16 Navigator Setup Section



Reports

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

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

Figure 2–17 Navigator Reports Section

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

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

Figure 2–18 Minimized Vertical Tab

Hierarchies Selector

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

- Location Hierarchy—view a list of locations defined for your business. For more information, see [Adding Locations Using the Location Hierarchy](#) on page 5-6.
- Store Sets—view a list of store sets defined for your business. For more information, see [Adding Locations Using Store Sets](#) on page 5-8.
- Merchandise Hierarchy—view all merchandise according to the organization established for your business.
- Assigned Categories—if you are viewing a promotion within the Promotion Manager, view the categories that have been assigned to it. For information about assigning categories to a promotion, see [Categories](#) on page 5-15.

- Offers—if you have already defined offers for a promotion, view these offers according to vehicle, version, and whether they are positioned or unpositioned. For more information about offers, see [Offers](#) on page 5-17.
- SKU Lists—view all SKU Lists defined for your organization.

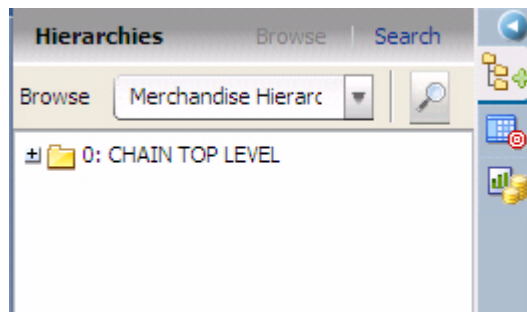
Use the Search and View Details (icon of a magnifying glass) features to assist you in searching for and viewing the details of items contained within the Hierarchies Selector.

Merchandise Hierarchy

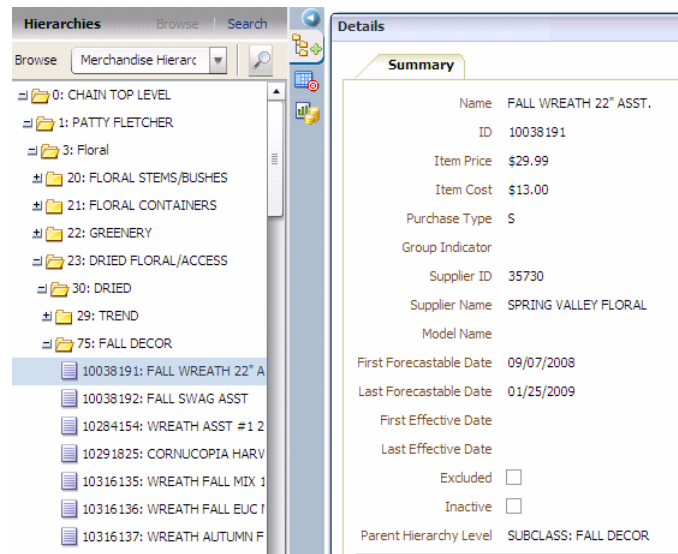
Use the Merchandise Hierarchy to view and select merchandise levels.

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

Figure 2–19 Expanded Vertical Tab with the Hierarchies Selector Opened



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

Figure 2–20 Details Window

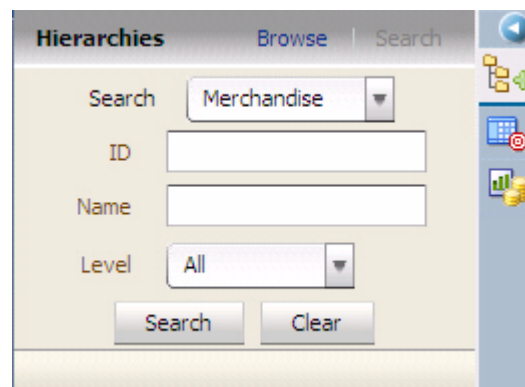
- In the Details window, note the fields for First Forecastable Date and Last Forecastable Date. In order to generate a forecast for a given item, the start and end dates for a promotion must fall within the range indicated by these dates.

Managing Merchandise

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

To find merchandise to manage:

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

Figure 2–21 Merchandise Hierarchy Search View

- b. Enter criteria in the fields to narrow the search. Enter part or all of an Item ID or Name. Select a Merchandise Hierarchy level from the Level field.
- c. Click **Search**. Items that match the search criteria appear in the list.

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

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

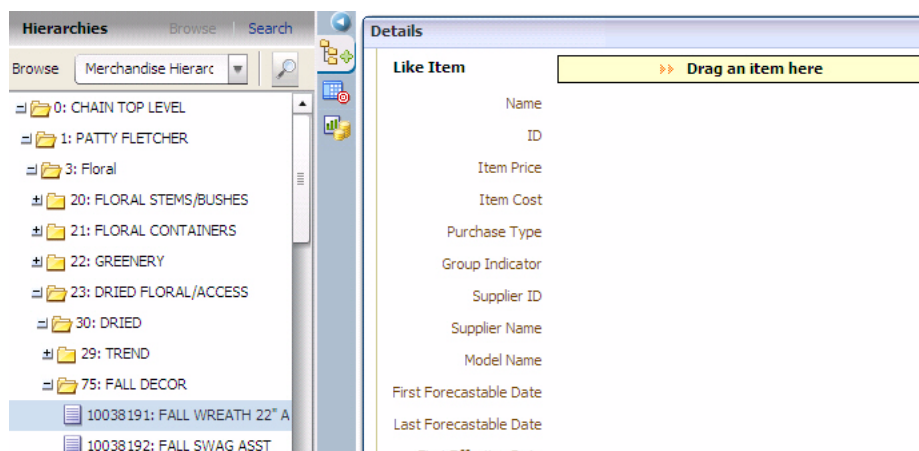
Like Items

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

Creating Like Item Associations To create a like item association:

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

Figure 2–22 Associating a Like Item to an Item within the Merchandise Hierarchy



5. Click **OK**.

Removing Like Item Associations To remove a like item association:

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

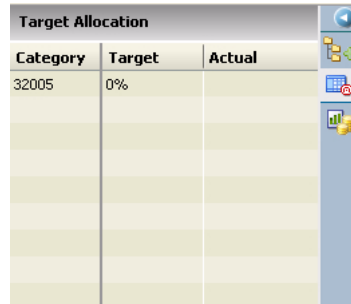
Target Allocation

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

To view target versus actual space allocation:

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

Figure 2–23 Target Allocation Window



Category	Target	Actual
32005	0%	

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

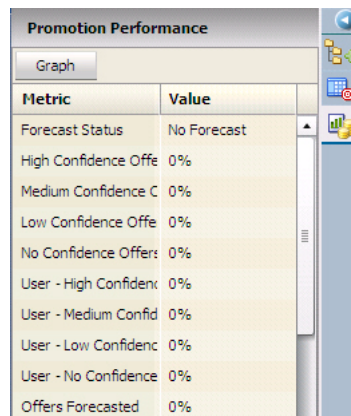
Promotion Performance

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

To view promotion performance information:

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

Figure 2–24 Promotion Performance Window



Metric	Value
Forecast Status	No Forecast
High Confidence Offer	0%
Medium Confidence Offer	0%
Low Confidence Offer	0%
No Confidence Offers	0%
User - High Confidence	0%
User - Medium Confidence	0%
User - Low Confidence	0%
User - No Confidence	0%
Offers Forecasted	0%

Templates

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

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

- [Page Templates](#) on page 3-1.
- [Vehicle Templates](#) on page 3-5.
- [Promotion Templates](#) on page 3-12.

Page Templates

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

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

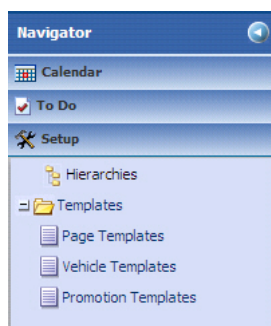
Page templates are associated with individual pages of vehicle templates.

Viewing Page Templates

To view page templates:

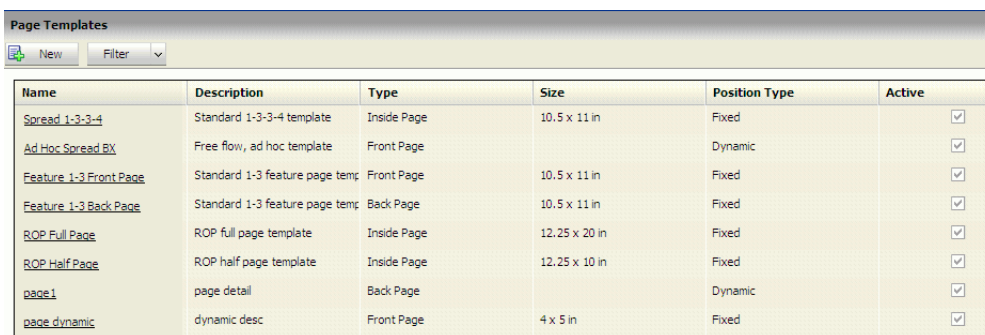
1. Select **Setup** from Navigator. Expand the Templates folder.

Figure 3–1 Navigator Setup Section



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

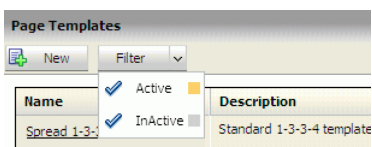
Figure 3–2 Page Templates List



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

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 Page Templates List Filter

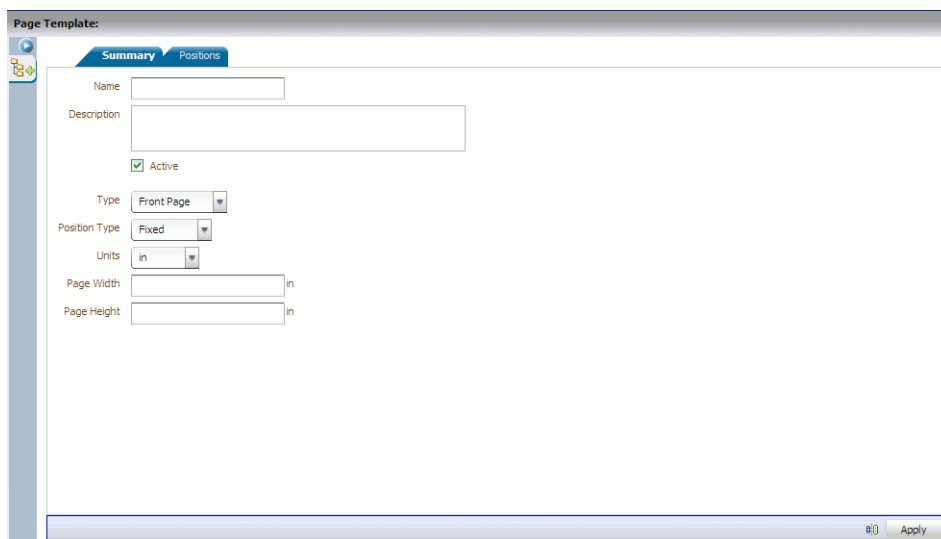


Creating a New Page Template

To create a new page template:

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

Figure 3–4 Summary Tab of the Page Template Window



Page Template: Summary Positions

Name:

Description:

☒ Active

Type:

Position Type:

Units:

Page Width: in

Page Height: in

Apply

Summary Tab

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

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

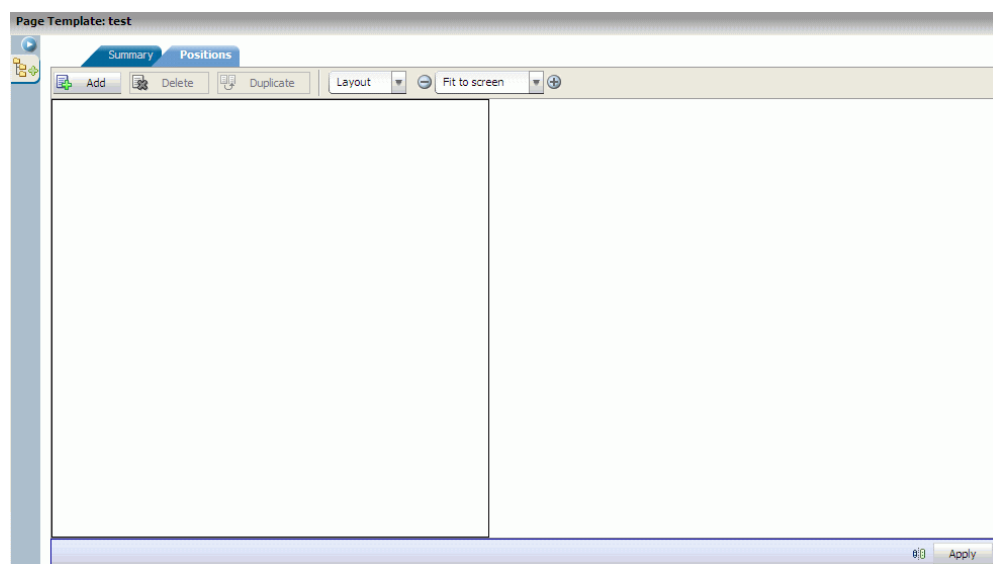
Note: If Dynamic is selected, the Positions tab is disabled. You cannot set the page units, width, and height.

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

Positions Tab

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

Figure 3–5 *Positions Tab of the Page Template Window*



- [Adding a Position to a Page](#) on page 3-4.
- [Removing a Position from a Page](#) on page 3-4.
- [Creating Copies of a Position](#) on page 3-4.

- [Using Drag and Drop to Set Position Block Dimension and Position Using Layout View](#) on page 3-4.

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

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

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

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

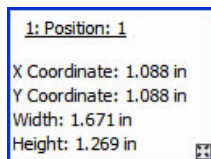
Creating Copies of a Position To create a copy of a position block:

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

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

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

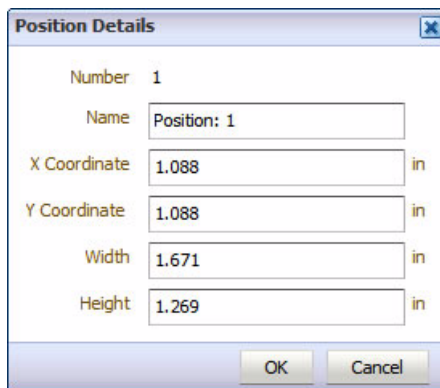
Figure 3–6 Position Block



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

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

Figure 3–7 Position Details Window



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

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

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

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

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

Figure 3–8 Position Details Window

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

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

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

Deactivating a Page Template

To deactivate a page template:

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

Vehicle Templates

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

with a page template. A vehicle template is then associated with a promotion template.

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

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

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

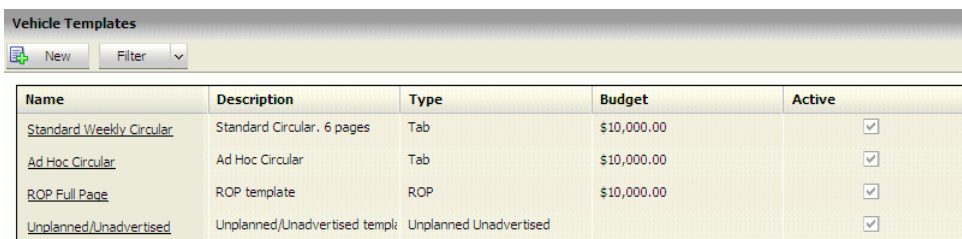
- [Viewing Vehicle Templates](#) on page 3-6.
- [Creating New Vehicle Templates](#) on page 3-6.
- [Modifying Vehicle Templates](#) on page 3-11.
- [Adding Pages to a Vehicle Template](#) on page 3-10.
- [Removing Pages from a Vehicle Template](#) on page 3-11.

Viewing Vehicle Templates

To view vehicle templates:

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

Figure 3–9 Vehicle Templates List



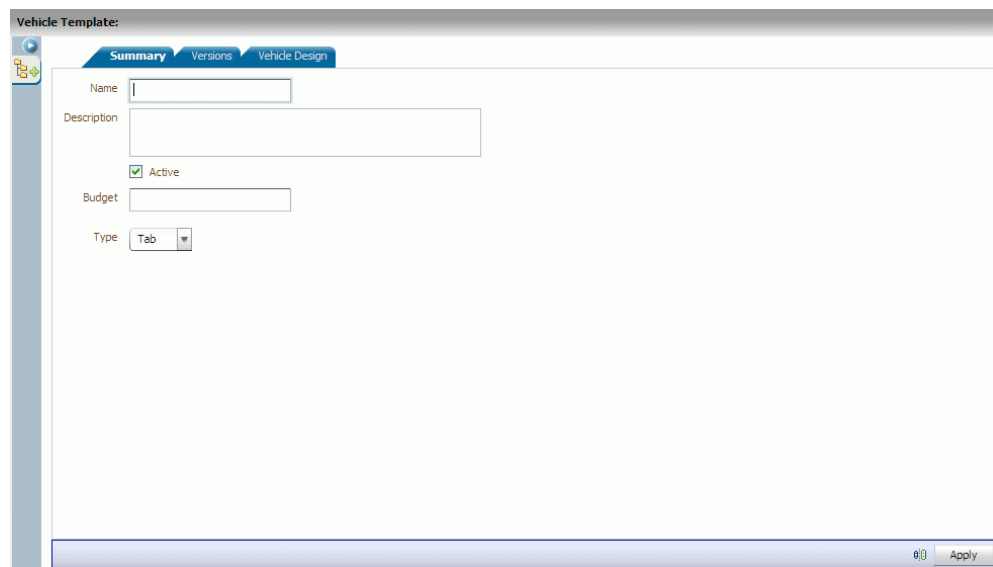
Name	Description	Type	Budget	Active
Standard Weekly Circular	Standard Circular, 6 pages	Tab	\$10,000.00	<input checked="" type="checkbox"/>
Ad Hoc Circular	Ad Hoc Circular	Tab	\$10,000.00	<input checked="" type="checkbox"/>
ROP Full Page	ROP template	ROP	\$10,000.00	<input checked="" type="checkbox"/>
Unplanned/Unadvertised	Unplanned/Unadvertised templ	Unplanned Unadvertised		<input checked="" type="checkbox"/>

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

Creating New Vehicle Templates

To create a new vehicle template:

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

Figure 3–10 Summary Tab of the Vehicle Template WindowThe screenshot shows a software window titled "Vehicle Template:". It has three tabs: "Summary" (selected), "Versions", and "Vehicle Design". The "Summary" tab contains several input fields: a "Name" field, a "Description" field, an "Active" checkbox which is checked, a "Budget" field, and a "Type" dropdown menu currently showing "Tab". At the bottom right of the window is an "Apply" button.

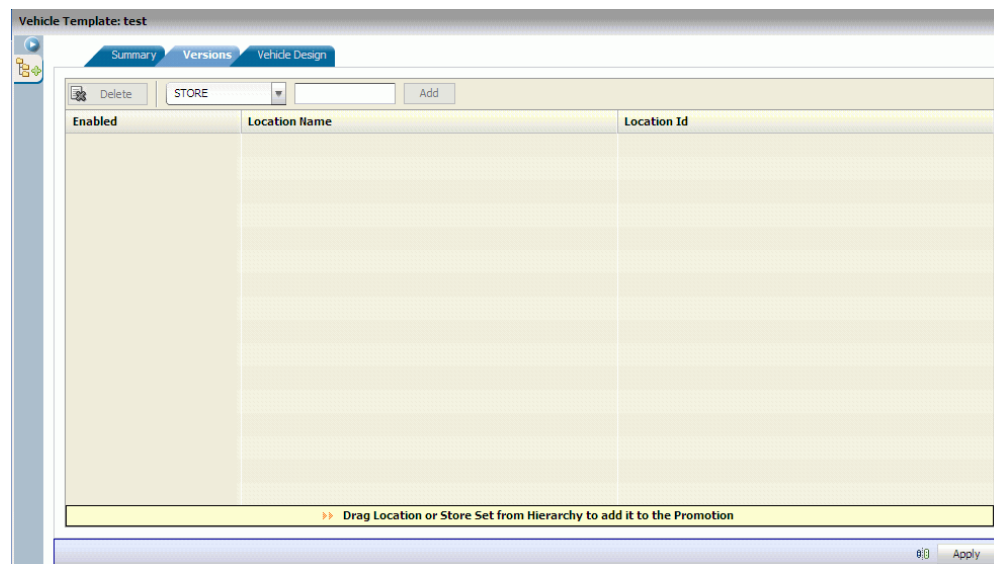
Summary Tab

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

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

Versions Tab

Use the Versions tab to create versions of your vehicle template for use in different locations.

Figure 3–11 Versions Tab of the Vehicle Template Window

Versions can be assigned using Locations or Store Sets as follows:

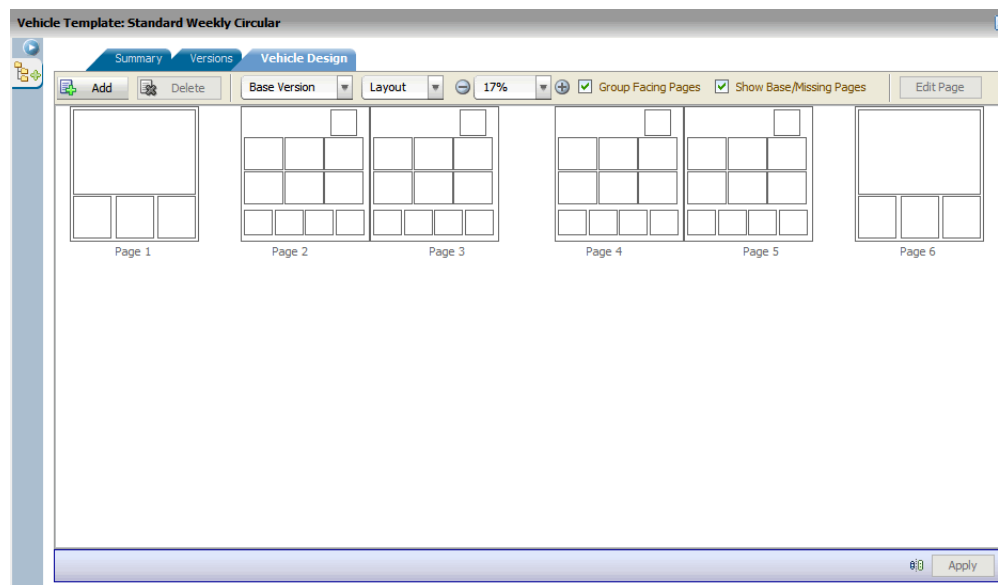
1. From the Versions Tab of the Vehicle Template window, select Store, Media Market, AdZone, Country, Company, Chain, or Store Sets from the drop-down menu.
2. Expand the Vertical Tab. Select either the relevant hierarchies from the Browse drop-down menu.
3. Click and drag the desired entry from the Hierarchy and drop it onto the bar labeled "Drag Location or Store Set from Hierarchy to add it to the Template". Repeat this process until all Locations or Store Sets have been added.

Note: You can also add a version using the Quick Add feature. Once you select the relevant option from the drop-down menu, enter the relevant name in the field, and click Add.

4. Click **Apply** to save your changes or continue to the Demand Drivers tab to define demand drivers for your vehicle.

Vehicle Design Tab

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

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

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

- [Viewing Vehicle Template Designs](#) on page 3-9.
- [Adding Pages to a Vehicle Template](#) on page 3-10.
- [Removing Pages from a Vehicle Template](#) on page 3-11.

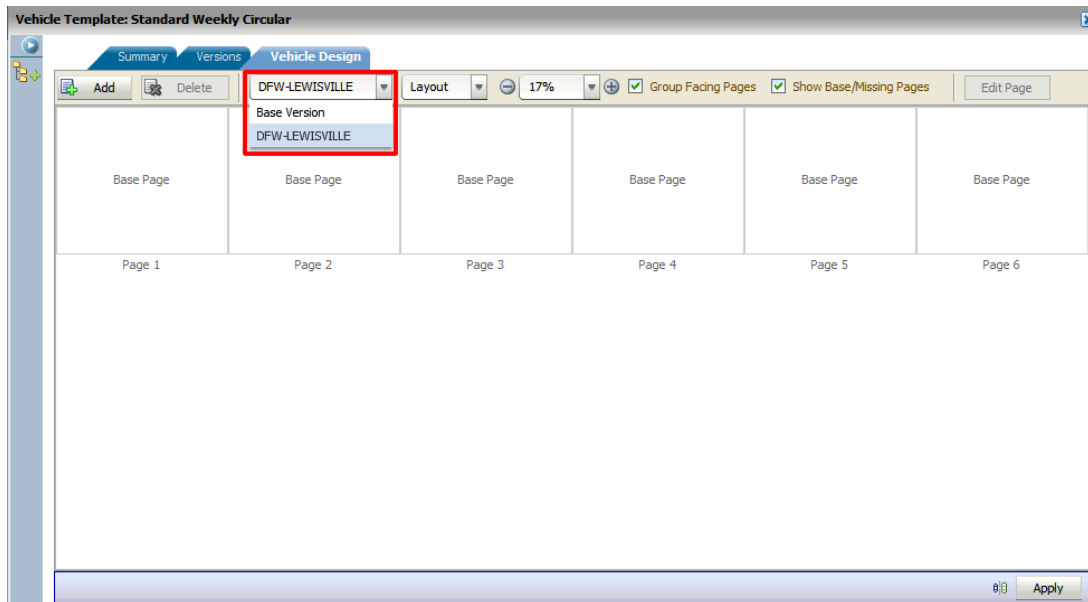
Note: If you select a vehicle template that has inactivated pages, you will also see the words "Page template is not active" written across the page template. If you place your mouse over an inactive page template, the following tooltip will be displayed "The page must be deleted or a new page template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

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

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

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

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

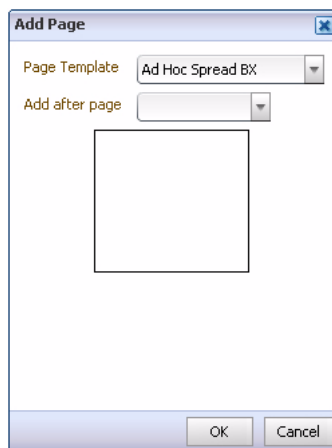
Figure 3–13 Viewing Vehicle Template Version

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

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

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

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

Figure 3–14 Add Page Window

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

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

3. **Add After Page**—select where to place the page.

Note: When you try adding a page to a version (other than the base version) of the vehicle template, the # text field appears in place of the **Add after page** drop-down list.

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

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

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

Modifying Vehicle Templates

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

- [Moving a Page in List or Layout View](#) on page 3-11.
- [Changing Page Template Assignment](#) on page 3-11.

Moving a Page in List or Layout View

To move a page in layout or list view:

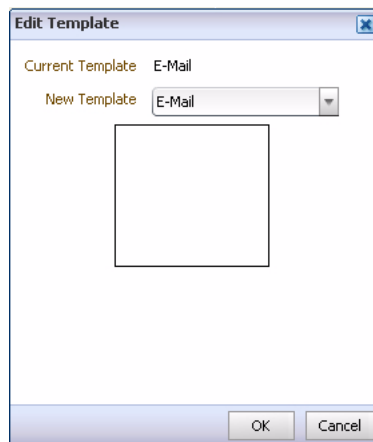
- Drag the page to a different location on the Vehicle Design tab.

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

Changing Page Template Assignment

To change the template assigned to a page:

1. Select the page in layout or list view.
2. Click **Edit Page**. The Edit Page window opens.

Figure 3–15 Edit Template Window

3. **New Template**—select a new template to use.

Note: When you try editing a page in a version (other than the base version) of the vehicle template, the # field appears below the **New Template** drop-down list.

It enables you to assign the template assignment to any other page set up for the vehicle template.

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.

For more information about promotion templates, see the following:



- [Viewing Promotion Templates](#) on page 3-12.
- [Creating a Promotion Template](#) on page 3-13.
- [Summary Tab](#) on page 3-13.
- [Versions Tab](#) on page 3-14.
- [Vehicles Tab](#) on page 3-15.
- [Workflow Tab](#) on page 3-16.

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 3–16 Promotion Templates List

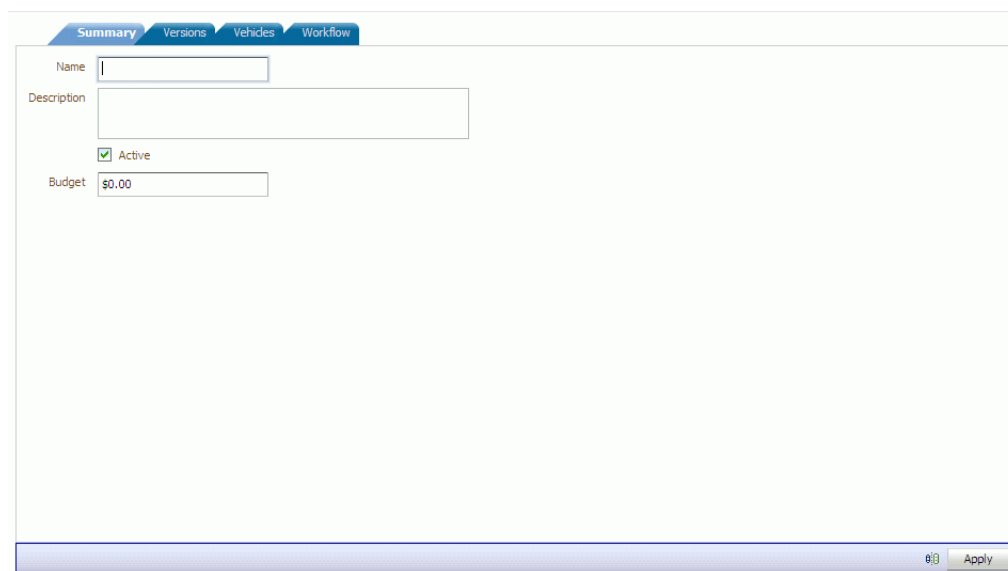
Promotion Templates			
 New  Filter			
Name	Description	Budget	Active
Circular - Std Weekly	Large event promotion.	\$50,000.00	<input checked="" type="checkbox"/>
Ad Hoc Promo	Ad hoc, unstructured promotion	\$50,000.00	<input checked="" type="checkbox"/>
Workflow Test Promo	Large event promotion.	\$50,000.00	<input checked="" type="checkbox"/>
ROP	Promotion using ROP, full page	\$50,000.00	<input checked="" type="checkbox"/>
Ad Planning Workflow		\$0.00	<input checked="" type="checkbox"/>
Unplanned/Unadvertised	Promotion template for Unplanned/Unadvertised	\$0.00	<input checked="" type="checkbox"/>
test1		\$0.00	<input checked="" type="checkbox"/>

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

Figure 3–17 Summary Tab of the Promotion Template Window


Summary Versions Vehicles Workflow

Name

Description

☒ Active

Budget

Apply

Summary Tab

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

Complete the following fields:

1. **Name**—enter a name for the template.
2. **Description**—enter an optional description of the template.
3. Leave the Active checkbox selected to allow this template to be associated with promotions.

4. **Budget**—enter a budget amount for the promotion.
5. Click **Apply**.
6. Additional options within the Promotion Template window:
 - To exit the template and return to the Promotion Template list, click the "X" in the upper right corner of the Promotion Template window.
 - To assign Versions, click the Versions tab of the Promotion Template window. See "[Versions Tab](#)" on page 3-14 for more information.
 - To assign Vehicles, click the Vehicles tab of the Promotion Template window. For more details, see "[Vehicles Tab](#)" on page 3-15.
 - To enter Workflow details, click the Workflow tab of the Promotion Template window. See "[Workflow Tab](#)" on page 3-16.

Versions Tab

Use the Versions tab of the Promotion Template window to assign locations or store sets to your promotion template.

To add versions, complete the following steps:

1. From the Versions Tab of the Vehicle Template window, select either Store Sets or Locations from the drop-down menu.

Figure 3–18 Versions Tab of the Promotion Template Window

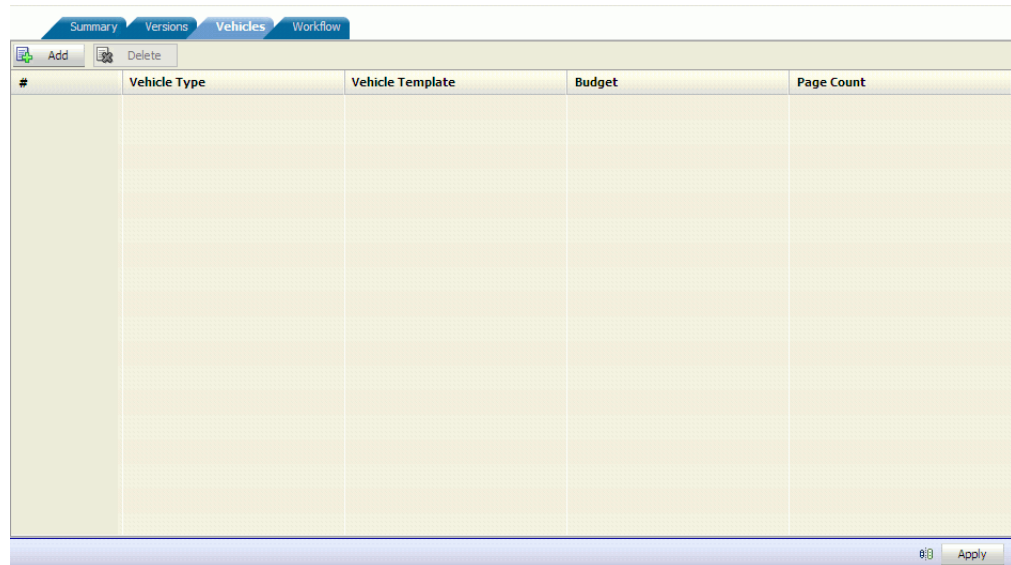
Enabled	Location Name	Location Id
Drag Location or Store Set from Hierarchy to add it to the Promotion		

2. Expand the Vertical Tab. Select either the Location Hierarchy or Store Sets Hierarchy from the Browse drop-down menu.
3. Click and drag the desired Location or Store Set from the Hierarchy and drop it onto the bar labeled "Drag Location or Store Set from Hierarchy to add it to the Template". Repeat this process until all Locations or Store Sets have been added.
4. Click **OK** to save your changes and return to the Summary Tab.

Vehicles Tab

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

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

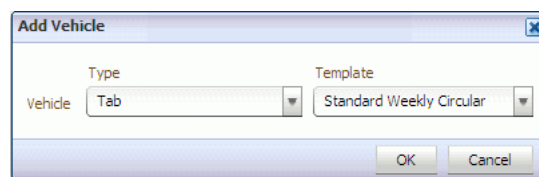


Adding Vehicles

To add a vehicle, complete the following steps:

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

Figure 3–20 The Add Vehicle Dialog Box



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

Deleting Vehicles

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

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

Workflow Tab

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

- [Phases](#) on page 3-16.
- [Tasks](#) on page 3-17.
- [Milestones](#) on page 3-19.

To open the workflow window:

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

Figure 3–21 Workflow Tab of the Promotion Template Window

Type	Name	Description	Priority	Duration	Assigned To	Offset from Start Date
↔	Created					
↔	Planning					
↔	Reviewing					
↔	Revising					
↔	Finalizing					
↔	Auditing					
↔	Running					
↔	Completed					

Phases

Use the information below to modify workflow phases.

Changing Phase Names To change the name of a phase:

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

Figure 3–22 Phase Details Window

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

Tasks

The following options are available for workflow tasks:

- [Adding Tasks](#) on page 3-17.
- [Modifying Tasks](#) on page 3-18.
- [Editing Existing Task Details](#) on page 3-18.
- [Removing Tasks](#) on page 3-19.

Adding Tasks To add a task to the workflow:

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

Figure 3-23 Task Details Window

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

- After Promotion Start Date—select this option if the task should start after the promotion start date.
10. **Notes**—enter optional considerations for the task.
 11. **Assignments**—assign the task to users.
 - a. Click **Edit** from the Assignments table. The Users Search window opens.

Figure 3–24 Users Search Window

- b. Enter search criteria.
 - **Last Name**—enter all or part of a last name.
 - **First Name**—enter all or part of a first name.
 - c. Click **Search**. The users matching the search criteria appear in the Available Users list.
 - d. Select the necessary subsets from the Available list.
 - e. Click the right arrow to move the users to the Selected list. Click the double right arrow to move all the users to the Selected list.
 - f. Click **OK**. The users are assigned to the task.
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 or outside of its current phase. If you move a task outside the current phase, the phase will be updated with the new phase.

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

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

Removing Tasks To remove a task:

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

Milestones

The following options are available for milestones:

- [Adding a Milestone](#) on page 3-19.
- [Modifying a Milestone](#) on page 3-19.
- [Removing a Milestone](#) on page 3-20.

Adding a Milestone To add a milestone to the workflow:

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

Figure 3–25 Milestone Details Window

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

Modifying a Milestone To move a milestone:

1. Select a milestone.

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

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

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

Campaigns and Events

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

Campaigns

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

You can create campaigns from the following two areas:

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

Creating Campaigns from the Calendar

To create a campaign from the calendar

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

Figure 4–1 Campaign Details Window

The screenshot shows a window titled "Campaign Details". It contains the following fields and controls:

- Name:** A single-line text input field.
- Description:** A multi-line text area.
- Start Date:** A date input field showing "02/08/2007" with a calendar icon to its right.
- End Date:** A date input field showing "02/08/2007" with a calendar icon to its right.
- Buttons:** "Save" and "Cancel" buttons at the bottom.

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

Creating Campaigns from the Navigator

To create a campaign from Navigator:

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

Events

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

1. **Calendar**—for more information about creating an event from the calendar, see [Creating an Event from the Calendar](#) on page 4-3.

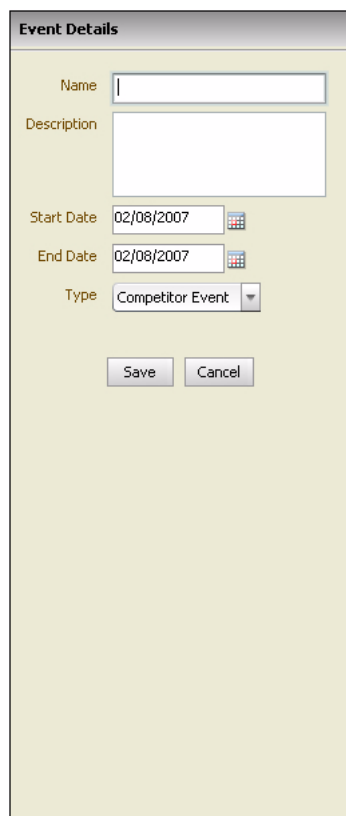
2. **Navigator**—for more information about creating an event from the navigator, see [Creating an Event from the Navigator](#) on page 4-4.

Creating an Event from the Calendar

To create an event from the calendar:

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

Figure 4-2 *Event Details Window*



The screenshot shows a window titled "Event Details" with a light beige background. It contains the following fields and controls:

- Name:** A single-line text input field.
- Description:** A multi-line text input field.
- Start Date:** A date input field showing "02/08/2007" with a calendar icon to its right.
- End Date:** A date input field showing "02/08/2007" with a calendar icon to its right.
- Type:** A dropdown menu currently showing "Competitor Event".
- Buttons:** "Save" and "Cancel" buttons at the bottom.

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

Creating an Event from the Navigator

To create an event from Navigator:

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

Promotions

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

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

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

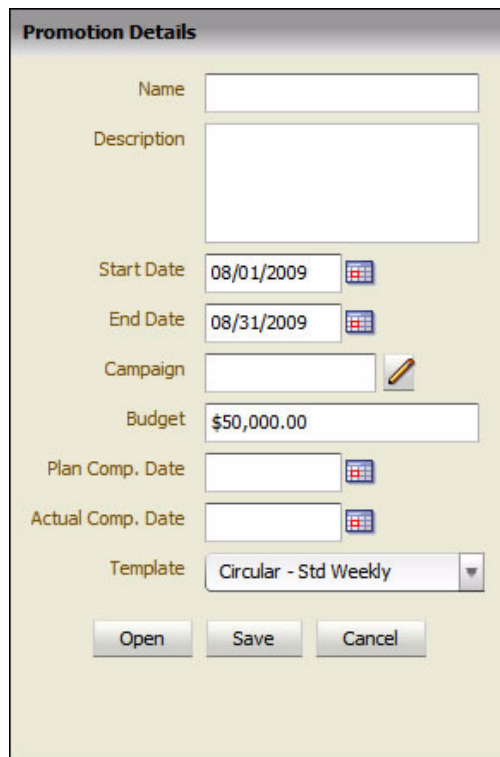
Creating Promotions

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

Creating Promotions from the Calendar

To create a promotion from the calendar:

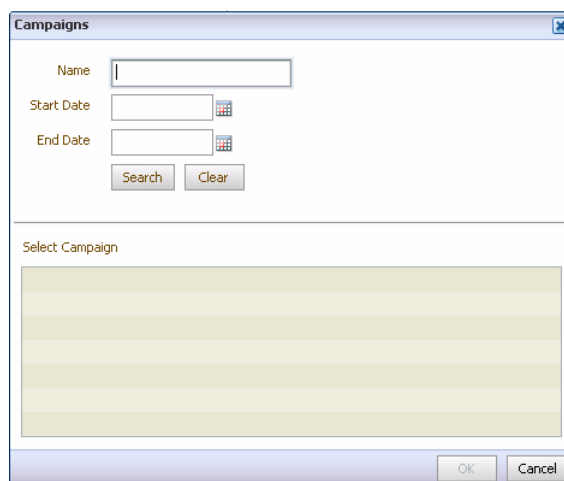
1. Click **New**.
2. Select **Promotion**. The Promotion Details window opens to the right.

Figure 5–1 Promotion Details Window


The **Promotion Details** window contains the following fields and controls:

- Name:** A text input field.
- Description:** A large text area.
- Start Date:** A date picker showing 08/01/2009.
- End Date:** A date picker showing 08/31/2009.
- Campaign:** A text input field with a pencil icon for search.
- Budget:** A text input field showing \$50,000.00.
- Plan Comp. Date:** A date picker.
- Actual Comp. Date:** A date picker.
- Template:** A dropdown menu currently set to "Circular - Std Weekly".
- Buttons:** Open, Save, and Cancel.

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

Figure 5–2 Campaigns Search Window


The **Campaigns** search window contains the following fields and controls:

- Name:** A text input field.
- Start Date:** A date picker.
- End Date:** A date picker.
- Buttons:** Search and Clear.
- Select Campaign:** A large list box for selecting a campaign.
- Buttons:** OK and Cancel.

- b. Enter search values.

- **Name**—enter all or part of the campaign name.
- **Start Date**—select a Start Date
- **End Date**—select an End Date
- c. Click **Search**. Campaigns matching the search criteria appear in the Select Campaign list.
- d. Select a campaign.
- e. Click **OK**. The campaign is added to the promotion.
- 8. **Budget**—enter an amount.
- 9. **Plan Comp. Date**—use this field to set the date when the promotion is scheduled to be completed.
- 10. **Actual Comp. Date**—use this field to record the actual date when the promotion was completed.
- 11. **Template**—select a promotion template.

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

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

Creating Promotions from the Navigator

To create a promotion from the Navigator:

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

Opening an Existing Promotion

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

To open a promotion from the calendar:

1. Click once onto the name of the promotion in the Promotion Manager. The Promotion Details window opens to the right.
2. 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 underneath the About link in the upper right corner of the Promotion Manager. This indicates that the tab you are viewing is locked for editing by another user.

Figure 5–3 Promotion Collaboration—Exclusive Lock Icon

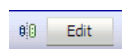


- An exclusive lock is created when any of the following edits are made to a promotion:
 - Changing a Promotion's Vehicle Type
 - Changing a Promotion's Template
 - Changing a Promotion's Vehicle Template
 - Adding Locations or Store Sets to a Promotion
 - Adding a Page
 - Reordering Pages
 - Changing 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.

Explicit Locking

While working in multi-user mode, you also have the ability to obtain an exclusive lock on either the Summary or Vehicle Design tabs of the Promotion Manager. To obtain the lock, click the **Edit** button located along the bottom of the screen.

Figure 5–4 Explicit Locking Icon



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

The Promotion Manager

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

The Promotion Manager contains the following tabs:

- **Summary**—provides summary level information about a promotion. For more information, see [Summary](#) on page 5-5. create different versions of your promotion for use in multiple locations. Locations can be defined using the Location Hierarchy or store sets. For more information, see [Adding Versions](#) on page 5-6.
- **Vehicles**—define one or more vehicles for use within your promotion. For more information, see [Vehicles](#) on page 5-9.
- **Vendor Deals**—Vendor Deals for your promotion can be added and managed on this tab. For more information, see [Vendor Deals](#) on page 5-12.
- **Categories**—assign categories of merchandise to your promotion. For more information, see [Categories](#) on page 5-15.
- **Offers**—create and define offers for your promotion. For more information about the Offers tab, see [Offers](#) on page 5-17.
- **Vehicle Design**—use the vehicle design tab to create the layout for your promotion. It is also possible to assign categories and create offers within this tab. For more information, see [Vehicle Design](#) on page 6-1.
- **Workflow**—assign tasks and keep track of promotion activities. For more information, see [Workflow](#) on page 7-1.

Summary

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

To add summary details to a promotion:

1. Open an existing promotion from the Promotion Calendar or create a new promotion. The Promotion Manager opens. Select the Summary Tab.

Figure 5–5 Promotion Manager Summary Tab

2. **Status**—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. The indicator will display within the Promotion Manager.

3. **Campaign**—associate your promotion with a campaign. Click the pencil icon to select a campaign.
4. **Versions**—to define versions for your promotion, see "[Adding Versions](#)" on page 5-6.
5. **Actual**—enter the actual cost of the promotion if it is known.
6. (optional) **Completion**—enter the planned and actual completion dates.
7. (optional) **Past Promotion Name**—if this promotion is similar to a previous one, enter the name of the previous promotion.
8. Click **Apply** to update the promotion with the information.
9. Click on other tabs within the Promotion Manager window to enter additional information.

Adding Versions

The Versions option within the Summary Tab of the Promotions Manager allows you to create versions of your promotion for use in different locations. Use locations within the Location Hierarchy or store sets to assign locations to your promotion. A promotion cannot use locations from both the Location Hierarchy and store sets. If you assign locations from the Location Hierarchy and then switch to store sets, all previously assigned locations will be deleted.

Adding Locations Using the Location Hierarchy

The Location Hierarchy, viewable within the Vertical Tab, contains different locations defined for your business.

- [Adding Locations](#)
- [Overriding Store Counts for Locations](#)
- [Removing Locations](#)

Adding Locations To assign locations to your promotion:

1. From the Summary tab of the Promotions Manager, select the Versions pencil icon.

Figure 5–6 Versions Pencil Icon

The screenshot shows the 'Summary' tab of the Promotions Manager. The 'Versions' section has a pencil icon next to it, indicating where to click to edit the promotion's versions. Other fields visible include Name, Description, Template (Circular - Std Weekly), Start Date (06/01/2009), Status (None), Campaign, Budget (\$50,000.00), and Cost (\$50,000.00).

Note: If you are opening an existing promotion, open it in single user mode. An exclusive lock is required to assign locations.

2. The Versions window opens.
3. From the drop-down, select **Locations**.
4. Open the Vertical Tab. Using the Browse menu, select **Location Hierarchy**.
5. The Location Hierarchy tree is displayed. Expand and collapse the tree as needed to find a location for your promotion.
6. After selecting a location, drag the location from the Location Hierarchy and drop it onto the bar labeled "Drag Location or Store Set from Hierarchy to add it to the Promotion".
7. Continue adding locations as desired.
8. Click **Ok** to finish and return to the Summary Tab.

Overriding Store Counts for Locations To override the store count for a given location:

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

Figure 5–7 Location Details Window

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

Removing Locations To remove a location from a version:

1. Open an existing promotion in single user mode. An exclusive lock is required.
2. From the Summary Tab of the Promotion Manager, click the Versions pencil icon.
3. The Versions window displays all locations defined for the promotion.
4. Click once onto a location to highlight it.
5. Select **Delete** to remove the location from the promotion. Continue removing additional locations from the promotion, if desired.
6. Click **Ok** to close the Versions window and return to the Summary Tab.

Adding Locations Using Store Sets

Use the store sets feature to add specific store sets to your promotion.

- [Adding Store Sets](#)
- [Overriding Store Counts for Store Sets](#)
- [Removing Store Sets](#)

Adding Store Sets The Location Hierarchy, viewable within the Vertical Tab, contains different store sets defined for your business.

To add store sets to your promotion:

1. Create or open an existing promotion.

Note: If you are opening an existing promotion, open it in single user mode. An exclusive lock is required to assign locations.

2. From the Summary Tab of the Promotions Manager, click the Versions pencil icon.
3. From the drop-down list, select **Store Set**.
4. Open the Vertical Tab. Using the Browse menu, select **Store Sets**.
5. The Store Sets Hierarchy tree is displayed. Expand and collapse the tree as needed to find a store set for your promotion.
6. After selecting a store set, drag the store set from the Store Sets Hierarchy and drop it onto the bar labeled "Drag Location or Store Set from Hierarchy to add it to the Promotion".

7. Continue adding store sets as desired.
8. Click **Ok** to finish and return to the Summary Tab.

Overriding Store Counts for Store Sets To override the store count for a store set, complete the following steps:

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

Figure 5–8 Store Sets—Overriding Store Count

The screenshot shows a 'Location' dialog box with the following fields and values:

- Location Id:** 5745
- Location Name:** KEENE
- Enabled:** ☒
- Override Count:** (empty text box)
- Count:** 1
- Stores:** (empty text box)

At the bottom of the dialog are 'OK' and 'Cancel' buttons.

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

Removing Store Sets To remove a store set for a version:

1. Open an existing promotion in single user mode. An exclusive lock is required.
2. Select the **Versions** tab in the Promotion Manager.
3. The store sets currently assigned to the version are listed.
4. Click once onto a store set to highlight it.
5. Select **Delete** to remove the store set from the promotion. Continue removing additional store sets from the promotion, if desired.
6. Click **Ok** to return to the Summary Tab of the Promotion Manager.

Vehicles

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

About the Vehicles Tab

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

Figure 5–9 The Vehicles Tab of the Promotion Manager

Summary Vehicles Vendor Deals Categories Offers Vehicle Design Workflow									
Add		Delete							
#	Name	Description	Start Date	End Date	Type	Template	Budget	Actual	Page Count
1	Standard Weekly Circular	Standard Circular			Tab	Standard Weekly	\$10,000.00		6

The Vehicles Tab displays the following information about assigned vehicles:

Table 5–1 Promotion Manager Vehicles Tab

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

About the Vehicle Details Window

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

Figure 5–10

The screenshot shows a window titled "Vehicle Details: Standard Weekly Circular". It has three tabs: "Summary", "Versions", and "Demand Drivers". The "Summary" tab is selected. The fields in the "Summary" tab are as follows:

- Name:** Standard Weekly Circular
- Description:** Standard Circular, 6 pages
- Start Date:** (empty field with a calendar icon)
- End Date:** (empty field with a calendar icon)
- Budget Cost:** x10,000.00
- Actual Cost:** (empty field)
- Vehicle Type:** Tab (dropdown menu)
- Vehicle Template:** Standard Weekly Circular (dropdown menu)

At the bottom of the window, there is a "Help" button on the left and "OK" and "Cancel" buttons on the right.

It contains three tabs as follows:

- **Summary**—enter details for your vehicle including the vehicle type and template you wish to use.
- **Versions**—use this tab to override promotion versions and assign vehicle specific versions. By default, if versions are assigned to the promotion, all vehicles assigned to the promotion will also use the same versions.
- **Demand Drivers**—this tab contains the demand drivers that are specific to your company's installation of Promotion Planning and Optimization.

Adding Vehicles

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

1. From the Vehicle Tab, click **Add**. The Vehicle Details window opens.
2. On the Summary Tab of the Vehicle Details window, complete the following fields:
 - **Name**—enter a name for the vehicle.
 - **Description**—enter a description.
 - **Start Date**—enter a start date or use the calendar icon to select a date.
 - **End Date**—enter an end date or use the calendar icon to select an end date.
 - **Cost (Budget)**—enter a budget amount.
 - **Cost (Actual)**—enter the actual cost of the vehicle. This field can be populated after the promotion ends for use in historical analysis.
 - **Vehicle Type**—select a Vehicle Type from the list of available types.
 - **Vehicle Template**—select a Vehicle Template from the list of available types.
 - Click **OK** to save your vehicle information or select the Versions tab to define versions for your vehicle.

3. All vehicles defined for a promotion inherit the versions assigned to the promotion. However, you can choose to override these versions and specify versions for each vehicle assigned to the promotion. Versions can be assigned using Locations or Store Sets as follows:
 - From the Versions Tab of the Vehicle Details window, select either Store Sets or Locations from the drop-down menu.
 - Expand the Vertical Tab. Select either the Location Hierarchy or Store Sets Hierarchy from the Browse drop-down menu.
 - Click and drag the desired Location or Store Set from the Hierarchy and drop it onto the bar labeled "Drag Location or Store Set from Hierarchy to add it to the Promotion". Repeat this process until all Locations or Store Sets have been added.
 - You also have the option of overriding store counts for the Locations or Store Sets assigned to your vehicle. See ["Overriding Store Counts for Locations"](#) on page 5-7 or ["Overriding Store Counts for Store Sets"](#) on page 5-9 for more information.
 - Click **Ok** to save your changes or continue to the Demand Drivers tab to define demand drivers for your vehicle.
4. The available demand drivers will depend on your implementation of Promotion Planning and Optimization. After selecting the desired options for your demand drivers, click **Ok** to return to the Vehicles tab.

Removing Vehicles

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

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

Vendor Deals

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

Adding a Vendor Deal

To add a vendor deal:

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

Figure 5–11 The Vendor Deals Tab of the Promotion Manager

[illegible]

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

Figure 5–12 Vendor Deal Details Window

Vendor Deal Details

Type

Off Invoice

Name

Description

Vendor Name

Vendor Desc.

Target

Promotion

Deal Type

% off

Deal Amount

%

Purchase Order

OK

Cancel

4. **Type**—select the type of vendor deal from the following options:
- **Off Invoice**—You receive a percentage or monetary amount off a vendor or supplier invoice in exchange for advertising specific merchandise on a promotion.

- Volume Purchase—a vendor or supplier agrees to provide vendor funding for promotional advertising after an agreed upon minimum monetary amount or quantity is purchased.
 - Ad Space—the vendor agrees to pay you a percentage or monetary amount of an advertisement in exchange for something such as front page exposure.
 - Presentation—the vendor agrees to pay you a percentage or monetary amount in exchange for stores presenting merchandise in a specific location such as an end cap.
5. **Name**—enter a name for the deal.
 6. **Description**—enter details of the deal.
 7. **Vendor Name**—enter the name of the vendor offering the deal.
 8. **Vendor Desc**—enter a description about the vendor offering the deal.
 9. **Target**—select the target of the deal from the following options:
 - Promotion
 - Category
 - Drag a category from the Merchandise Hierarchy to the Drag a Category here bar above the Target field.

Figure 5–13 Target Field

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

Figure 5–14 Target Field

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

- \$Off (Dollar off)
12. **Deal Amount**—enter the amount or percentage of the deal.
 13. **Purchase Order**—enter an associated purchase order number.
 14. Click **OK** to add the vendor deal to the list.

Deleting a Vendor Deal

To delete a vendor deal:

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

Categories

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

The following topics are available:

- [About the Categories Tab](#)
- [Adding Categories to a Promotion](#)
- [Deleting Categories from a Promotion](#)

About the Categories Tab

The Categories tab displays all assigned categories for a promotion. Each category is listed by its name and id number. Two views are available for displaying categories. The first is List View, which is the default view and shows categories in a list. The second view, Chart View, displays all categories on a graph according to their performance metrics. For more information about the graph, see [Graph](#) on page 5-46.

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

Adding Categories to a Promotion

To add a category to a promotion:

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

Figure 5–15 Promotion Manager Categories Tab

Category	Name	Target	Actual	Budget	ROI %	Lift %	Margin Lift	Sales Lift	Base Units/Store	Incr Units/Store
Total Category Performance										
					0%	0%	0%	0%		

Drag a Category here to add it to the Category List

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

Figure 5–16 Target Window

Target

Name: Action Figures

Target: 0 %

Actual: %

OK Cancel

- 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.
- Click **OK**. The Target column is updated.

Deleting Categories from a Promotion

To delete a category from a promotion:

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

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

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

Offers

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

About the Offers Tab

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

Figure 5–17 Promotion Manager Offers Tab

[illegible]

For all offers listed within the Offers tab, the following information is available as described in [Table 5-2](#).

Table 5–2 Offers Tab—Individual Offer Details

Field	Description
Offer Name	Name of the offer.
Category	The Category ID number of the Offer's assigned categories from within the Merchandise Hierarchy.
Offer	Value of the Offer (%Off, \$Off, etc.)
Deal	If a vendor deal has been defined, the amount of the vendor deal is displayed.
Offer Status	<p>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.</p> <p>Note: You must have edit access to an offer in order to change its status.</p>

Table 5–2 (Cont.) Offers Tab—Individual Offer Details

Field	Description
Confidence	Indicates the level of confidence in the forecast metrics. For more information, see Forecast Confidence Indicator on page 5-19.
Forecast Status	The current status of the Offer's forecast. For more information, see Forecasting on page 5-43.
SKUs Forecasted	Indicates the number of SKUs in the offer that have a forecast
#SKUs	Number of SKUs contained within the offer.
#Versions	Number of versions for the offer. You can click on the value for the relevant offer to view more information on the versions.
#Positions	Number of positions for the offer. You can click on the value for the relevant offer to view more information on the positions.

Offers Tab Menu Options

The Offers tab provides access to the following functionality:

- Add—add a New Offer. For more information about adding offers, see [Adding An Offer](#) on page 5-22.
- Delete—delete an existing offer. For more information about deleting an offer, see [Deleting An Offer](#) on page 5-27.
- Forecast—update the performance metrics for your promotion. For more information about the forecasting feature, see [Forecasting](#) on page 5-43.
- Submit—submit individual offers or all offers for submission. For more information, see [Submitting An Offer](#) on page 5-32.
- Approve—approve individual offers or all offers for approval. For more information, see [Approving An Offer](#) on page 5-33.
- Deny—reject individual offers or all offers. For more information about rejecting offers, see [Rejecting An Offer](#) on page 5-34.
- Total Offer Performance—view performance metrics for all of the Offers in your promotion.

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

- Offer Status Filter—filter offers by their current submission status. Select from All Statuses, In Process, Submitted, Approved, or Denied. For more information about Submitting Offers, see [Submitting, Approving, and Rejecting Offers](#) on page 5-30.
- Positions Menu—use this menu to filter offers according to their position within the promotion vehicle. Display either All Position Types, Positioned or Unpositioned offers. For more information about positions, see [Position Details Window](#) on page 6-5.
- Forecast Status Menu—view offers according to their forecast status. For more information about the forecast status types, see [Forecast Statuses](#) on page 5-45.
- Confidence Filter—view offers according to their forecast confidence. Options include No Confidence, High, Medium, Low, User (No Confidence), User (Low System Confidence), User (Medium System Confidence), and User (High System Confidence). For more information about forecast confidence, see [Forecast Confidence Indicator](#) on page 5-19.

- Group—if offers have been assigned to groups, enter the name of the group and press enter to filter the list of available offers.
- My Offers—displays only the offers that you have the ability to edit. All other offers are excluded.
- All Offers—lists all offers in the promotion.
- List View—offers are displayed in a list.
- Chart View—offers are displayed in a graphical format.









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

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

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

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

Table 5–3 Confidence Indicator Icons and Icon Definitions

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

The Offer Details Window

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

Figure 5–18 Offer Details Window with the Offer Definition Tab Displayed

The Offer Details window consists of 4 tabs as follows:

- Offer Definition—when an offer is initially added or when an existing offer is opened, the Offer Definition tab is displayed by default. This tab displays all properties for an offer. For information about adding an offer, see [Adding An Offer](#) on page 5-22.
- Performance & What-If—view forecast data and experiment with what-if scenarios. For more information, see [Performance & What-If](#) on page 5-35.
- Media Details—include media details for your offer such as images, headlines, and body copy. For more information, see [Media Details](#) on page 5-49.
- Notes—when creating or opening an existing offer, use the Notes tab of the Offer Details window to enter notes about the offer, the importance of the offer or note, and to update offer status (e.g. In Process, Submitted, Approved, or Denied). For more information about entering notes, see [Adding Notes to a New Offer](#) on page 5-51.

The Offer Definition tab of the Offer Details window displays the properties of a single offer. See [Table 5–4, "Offer Details Window—Offer Definition Tab—Offer Details"](#) for more information.

Table 5–4 Offer Details Window—Offer Definition Tab—Offer Details

Field	Description
Offer Name	Name of the Offer.
Offer Type	Type of Offer (% Off, Dollar off, etc.).
Offer Amount	Discount applied based on offer type.
Deal Amount	If a vendor deal has been defined for your offer, enter the deal amount here. (confirm this)
Price	Price of the Offer Item. High and Low prices represent the highest and lowest price of the SKU's available for the offer.

Table 5–4 (Cont.) Offer Details Window—Offer Definition Tab—Offer Details

Field	Description
Override Price	To override the price, enter new values for High, Low, and/or Avg price.
Group	The name of the group that the offer is assigned to.
Include in Forecast	If selected, offer will be included in forecast. If it is not selected, offer will not be included in forecast calculations.
Override Tot Units/Store	Average Total Units per Store.
Override Avg Cost	Average cost of the items in the offer.
Override Avg Ad Price	Average ad price.
Name	Name of the merchandise.
Description	Brief Description of the offer.
Type	Offer Type.
List Type	Standard offers will have Buy assigned for this option. Buy One Get One offers use this feature to define whether items are part of the Buy or Get list.
Excl	If checked, all items that meet filter criteria have been excluded.
Operator	Identify which operator was used when filtering a list of items. When no filtering is applied, this field defaults to "or" for SKUs and "and" for categories.
Filtered	If checked, at least one of the following criteria has been defined: Item Price, Item Cost, Supplier ID, Purchase Type or Group Indicator.
Filter 1	If filtered, show filter options for the first filter.
Filter 2	If more than one filter, show the filter options for filter 2.
Filter 3	If more than one filter, show the filter options for filter 3.
Filter 4	If more than one filter, show the filter options for filter 4.
Filter 5	If more than one filter, show the filter options for filter 5.
#SKU's	Number of SKUs associated with the offer.
Quick Entry List	Using this text box, enter id's for SKUs, classes, departments, divisions, companies, chains or SKU lists to add to the offer.

Filters

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

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

Adding An Offer

To add an offer to a promotion:

1. From the Offers tab of the Promotion Manager, select **Add**.
2. The Offer Details window opens.

Figure 5–19 Offer Details Window—Adding an Offer

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

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

4. **Offer Type**—select the type of offer. Your offer types may vary. The following are the basic offer types supported by Promotion Planning and Optimization:
 - \$Off—a specific monetary amount off the items on the offer.
 - % Off—a specific percentage off the price of the items on the offer.
 - Discount Price—a specific price for an item on the offer.
 - Everyday Low Price—the regular low price of an item on the offer.
 - Buy One...—an additional item or discount off an additional item with the purchase of one or more items.
 - Free Gift with Purchase—a gift for purchasing an item.
 - Instant Rebate—a monetary amount given back for purchase of an item.
5. **Offer Amount**—enter or select the amount or percentage off.
6. (Optional) **Deal Amount**—enter a vendor deal amount, if applicable.
7. (Optional) Override the system calculated High Price, Low Price, Avg Price, Tot Units/Store, Avg Cost, and Avg Ad Price. Promote will autofill these fields by selecting the highest and lowest Item Price value from all the (non-excluded) SKUs in the offer.
8. (Optional) **Group**—enter the group to which the offer belongs.

9. (Optional) Select the "Include in Forecast" checkbox to include the offer in the promotion forecast.
10. Using the Vertical Tab, select **Hierarchies**. Select one of the following:
 - **Assigned Categories**—add items to your offer from categories that have already been assigned to the promotion. You may only use this option if you have previously assigned categories to your promotion within the Categories tab of the Promotion Manager.
 - **SKU or SKU List**—select a distinct SKU or an entire SKU List from the Merchandise Hierarchy. The SKU Detail or SKU List Detail popup will open asking you to include or exclude SKU(s). Use the Refresh button to refresh the SKUs included in your offer.
 - To add individual SKUs to your offer, use the SKU quick entry field within the Offer Details window.

Figure 5–20 SKU Quick Entry Feature

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

Figure 5–21 Drag Item to Offer Bar

12. The Category or SKU List Details window opens.
 - **Level**—select "Include Category" to include the SKU category or select "Exclude Category" to exclude the SKU category.
 - **List Type**—select Buy. The Get option is used within the Buy One Get One Offer Type. See [Creating a Buy One Get One \(BOGO\) Offer](#) on page 5-24 for more information.
 - **Filter By**—select "And" or "Or" and then choose from Item Cost, Item Price, Supplier ID, Purchase Type, or Group Indicator as additional filter options. You will be able to enter specific values for each filter definition.
 - Click **OK**.
13. To save your offer:
 - Click **OK and New** to save your offer and create a new offer.
 - Click **OK** to save your offer and close the Offer Definition window.
14. **Offer Forecast**. After you have finished creating your offer, you have the option of running the forecast from the Offers tab of the Promotion Manager. For more information about forecasting an offer, see [Forecasting Offers](#) on page 5-43.

15. **Offer Status.** After an offer is created, its status is changed to "In Process". For more information about submitting an offer for approval, see [Submitting, Approving, and Rejecting Offers](#) on page 5-30.

Creating a Buy One Get One (BOGO) Offer

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

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

Creating BOGO's Using Categories of Items

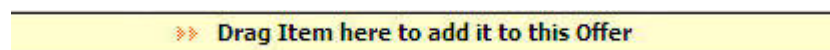
Complete the following steps to create a BOGO offer that uses a Category of items.

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

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

4. **Offer Type**—select one of the BOGO offer types from the list. Depending on your implementation of Promotion Planning and Optimization, you may have some or all of the following BOGO types:
 - **Buy One Get One %Off**—Buy One item and get another item at a certain %off. Define the percentage value in Step 5 below.
 - **Buy 2**—Buy 2 items and get another at a defined price. The price will be defined in Step 5 below.
 - **Buy 1**—Buy 1 item and get another at a defined price. The price will be defined in Step 5 below.
5. **Offer Amount**—enter or the amount or percentage off.
6. Define items for the "Buy" list. Using the Hierarchies Selector, select **Merchandise Hierarchy**, and then select a Category.
7. Drag your selected Category from the Merchandise Selector, and drop it onto the bar labeled "Drag Item here to add it to this Offer" located at the bottom of the screen.

Figure 5-22 Drag Item to Offer Bar



8. The Category Details popup opens.
 - **List Type**—select **Buy**.

- **Filter By**—enter values for the filter criteria.
 - Click **Ok**.
9. Create the "Get" list. Select a Category from the Merchandise Selector.
-
- Note:** You have the option of creating the "Get" list using the same Category you specified in the "Buy" list.
-
10. Drag the selected Category to the "Drag Item here to add it to this Offer" bar located at the bottom of the screen.
 11. The Category Details popup opens.
 - **List Type**—select **Get**.
 - **Filter By**—enter values for the filter criteria.
 - Click **Ok**.
 12. 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.
 13. Offer Forecast. After you have finished creating your offer, you have the option of running the forecast for it from the Offers tab of the Promotion Manager. For more information about forecasting an offer, see [Forecasting Offers](#) on page 5-43.
 14. 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 5-30.

Creating BOGO's Using SKU Lists

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

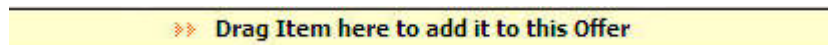
1. From the Offers tab of the Promotion Manager, select **Add**.
2. The Offer Details window opens.
3. **Offer Name**—enter a name for the offer.

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

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

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

Figure 5–23 Drag Item to Offer Bar



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

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

10. Drag the selected SKU List to the "Drag Item here to add it to this Offer" bar located at the bottom of the table.
11. The SKU List Details popup opens.
 - **List Type**—select **Get**.
 - Click **Ok**.
12. 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.
13. Offer Forecast. After you have finished creating your offer, you have the option of running the forecast for it from the Offers tab of the Promotion Manager. For more information about forecasting an offer, see [Forecasting Offers](#) on page 5-43.
14. 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 5-30.

Editing an Existing Offer

To edit an existing offer:

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

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

4. Refer to steps 3 through 13 of [Adding An Offer](#) on page 5-22.

Deleting An Offer

To delete an offer, complete the following steps:

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

Working with Offer Versions

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

Viewing Offer Vehicle Versions

To view vehicle versions of an offer:

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

Figure 5–24 Offer Details Window—Version View

Enabled	Vehicle	Version	Offer	Deal Amount	Store Count	Store Count Override	High Price	Low Price	High Price Override
<input checked="" type="checkbox"/>		BAY AREA, CA	Buy 1 Get 1 Free	\$2,500.00	29	10	\$5.00	\$5.00	
<input type="checkbox"/>		MIAMI/FT. LAUDERD	Buy 1 Get 1 Free	\$2,500.00	11		\$0.00	\$0.00	

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

Figure 5–25 Version Details Window

The screenshot shows a 'Version Details' window with the following fields and values:

- Version:** JAX-DUVAL RD (checked)
- Offer Type:** Buy 1
- Deal Amount:** (empty)
- Store Count:** 1
- Notes:** (empty)
- Price Versioning:** Compute button
- High Price:** ≈449.99
- Low Price:** ≈0.00
- Avg Retail Price:** ≈20.12
- User Forecast:**
 - Tot Units/Store:** 0.0
 - Avg Cost:** ≈6.96
 - Avg Ad Price:** ≈10.06

Buttons: OK, Cancel

The Version Details window contains the following fields:

- A checkbox to enable or disable the version.
- Offer Type. The current offer type is displayed.
- Deal Amount. If a Vendor Deal has been defined for the offer, the amount of the deal is listed.
- Store Count. The store count for the given version can be overridden here.
- Notes. Space for providing additional notes about the version.
- Price Versioning. Prices can be adjusted for versions by overriding values for High Price, Low Price, and Avg Retail Price and clicking the Compute button.
- User Forecast. Override values for Tot Units/Store, Avg Cost, and Avg Ad Price.

Including/Excluding an Offer Version

To include or exclude a version of an offer:

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

1. Open an offer from the Offers tab of the Promotion Manager. The Offer Details window opens.
2. Select **Version View**. The Offer Details window redisplayes according to its versions.

3. From the Version column, select a version. The Version Details window opens.
4. Select the checkbox next to the Version name to enable it. Deselect the checkbox to disable it.
5. Click **Ok**.

Modifying an Offer Version

To modify a version of an offer:

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

Figure 5–26 The Version Details Window

The screenshot shows the 'Version Details' window for a version named 'JAX-DUVAL RD'. The window is divided into several sections:

- Version Details:** A checkbox is checked next to 'JAX-DUVAL RD'.
- Offer Type:** A dropdown menu is set to 'Buy 1'.
- Deal Amount:** An empty text input field.
- Store Count:** A text input field containing the value '1'.
- Notes:** An empty text area.
- Price Versioning:** A 'Compute' button is present.
- High Price:** A text input field with the value '≈449.99'.
- Low Price:** A text input field with the value '≈0.00'.
- Avg Retail Price:** A text input field with the value '≈20.12'.
- User Forecast:**
 - Tot Units/Store:** A text input field with the value '0.0'.
 - Avg Cost:** A text input field with the value '≈6.96'.
 - Avg Ad Price:** A text input field with the value '≈10.06'.

4. Modify any of the following options:
 - **Include or Exclude**—select or deselect the checkbox located next to the name of the Version.
 - **Offer Type**—select a new offer type.
 - **Deal Amount**—if a Vendor Deal has been defined, enter the deal amount.
 - **Store Count**—override the store count by entering a new number.
 - **High Price**—override the High Price by entering a new price.
 - **Low Price**—override the Low Price by entering a new price.
 - **Avg Retail Price**—override the Avg Retail Price by entering a new price.
 - **Tot Units/Store**—override the Tot Units/Store by entering a new value.
 - **Avg Cost**—override the Avg Cost of an item by entering a new cost.
 - **Avg Ad Price**—override the Avg Ad Price of an item by entering a new price.
5. Click **Ok** to save your changes. Click **Cancel** to discard.

Price Versioning

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

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

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

Computing Prices for All Versions To compute prices for all versions:

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

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

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

Submitting, Approving, and Rejecting Offers

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

About Offer Status

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

Figure 5–27 Promotion Manager—Offers Status Column

My Offers All Offers		List View Chart View		
Offer Name	Category	Offer	Deal	Offer Status
BOGO	28	Buy 1 Ge		In Process

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

Figure 5–28 Offer Status Info Viewable from Offer Details Window

Offer Details: Semi Precious Beads Sale	Position: None	Position Categories: None	Status: In Process
---	----------------	---------------------------	--------------------

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 5–29 Offer Status Window—Information about an Offer's Status

Offer Name: Semi Precious Beads Sale

Current Status: In Process

New Status: ☐ Submitted
☐ Approved
☐ Denied

Notes

Created By: Ken R. Smith 03/12/2008 15:29:52
 Last Modified By: Ken R. Smith 03/17/2008 13:29:01

Open Cancel

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

Required Criteria to Submit an Offer

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

- Have a status of "In Process".
- Must be associated with a SKU, Category, or a SKU List.
- Must have a High and Low Price (either system generated or user specified).
- Must not have a Forecast Status of "Unable to Forecast", "No Forecast", or "Failed". Offers with a Forecast Status of "Excluded" qualify for submission.

Submitting An Offer

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

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

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

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

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

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

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

Figure 5–32 Approve Offer Status Window

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

Approving All Offers To submit all offers:

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

Figure 5–33 Approve All Offers Dialog Box

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

Rejecting An Offer

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

Rejecting a Single Offer To reject a single offer:

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

Rejecting All Offers To reject all offers:

1. Open the promotion in Single User mode from the Promotion Manager. When the promotion opens, select the Offers Tab. Ensure that no offers are selected on the Offers Tab.
2. Click **Deny**. The Deny Offer window opens.
3. Select the **Deny** radio button.
4. (Optional) Enter notes using the Notes field.
5. Select the "Include all with a status of Approved" checkbox to Deny all offers that have already been approved for the promotion.

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

6. Click **Close** to finish.

Performance & What-If

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

The following options are available:

- **What-If**—use the What-If feature to create forecast comparisons between your original offer and up to 9 what-if scenarios. What-If scenarios can be viewed as columns (Vertical View) or as a list (List View). For more information about What-If, see [Performing a What-If Analysis](#) on page 5-38.
- **Forecast**—use forecasting to recalculate predicted demand and update the performance metrics. For more information, see [Forecasting](#) on page 5-43.
- **User Forecast**—You also have the ability to enter your own values to predict the forecast. For more information, see [Creating a User Forecast](#) on page 5-40.
- **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 5-42.
- **Graph**—use the Graph to view the base and potential performance of a promotion. For more information, see [Graph](#) on page 5-46.

About the Performance & What-If Screen

The Performance & What-If tab by default contains the following 3 columns:

- Column 1—your current offer with attributes listed.
- Columns 2 and 3—these columns represent What-If scenarios 1 and 2.

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

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

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

The number and type of scenarios available for experimentation can also be selected using the Setup option. See [Setting Up What-If Scenarios](#) on page 5-37 for more information.

You can also add a system forecast for your offer. You can add this as separate column using the User Forecast button. More details about the use of this column can be found within [Creating a User Forecast](#) on page 5-40.

Viewing the Performance and What-If Screen

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

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

Figure 5-34 Performance and What-If Vertical View

Current Offer	What-If - 1	What-If - 2
Offer Type: Buy 1	Buy 1	Buy 1
Offer Amount: Get 1 Free	Get 1 Free	Get 1 Free
Deal Amount: \$5,000.00	\$5,000.00	\$5,000.00
Versions: BAY AREA, CA, Tab	BAY AREA, CA, Tab	BAY AREA, CA, Tab
Forecast Status: Unable To Forecast		
Confidence: 0%		
SKUs Forecasted: 0%		
Coverage: 0%		
# Included SKUs: 1		
# Total SKUs: 1		
Value Index: 0.0		
Aff Value Index: 0.0		

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

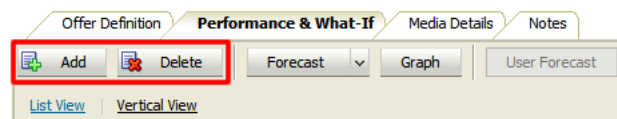
Figure 5–35 Performance and What-If List View

Name	Offer	Deal	Version	Forecast Status	Value Index	Aff Value Index	Tot Value Index	Confidence	SKUs Forecasted	Coverage
What-If - 1	Buy 1 Get	\$5,000.00	BAY AREA, CA							
What-If - 2	Buy 1 Get	\$5,000.00	BAY AREA, CA							
Current Offer	Buy 1 Get	\$5,000.00	BAY AREA, CA	Unable To Forecast	0.0	0.0	0.0	0%	0%	0%

Setting Up What-If Scenarios

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

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

Figure 5–36 Add and Delete Buttons on the Performance & What-If Tab

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

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

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

Figure 5–37 The Scenario Setup Window

2. **Scenarios**—select the number of scenarios you wish to experiment with (up to 9).
3. **Offer Type**—select an offer type.

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

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

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

Using the Value Index to Optimize Offers

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

To override the Value Index, complete the following steps:

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

Figure 5–38 The Value Index Window

Basket Sale	
	Override System
Units Ratio	<input type="text"/> 20%
Sales Ratio	<input type="text"/> 40%
Margin Ratio	<input type="text"/> 40%
Affinity Units Ratio	<input type="text"/> 20%
Affinity Sales Ratio	<input type="text"/> 40%
Affinity Margin Ratio	<input type="text"/> 40%

OK Cancel

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

Performing a What-If Analysis

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

Figure 5–39 The Performance and What–If Window

Offer Details: BOGO Status: In Process

Offer Definition Performance & What-If Media Details Notes

Add Delete Forecast Graph User Forecast Affinity Details Apply Reset Reset All Value Index Setup

List View Vertical View

Current Offer	What-If - 1	What-If - 2
Offer Type: Buy 1	Buy 1	Buy 1
Offer Amount: Get 1 Free	Get 1 Free	Get 1 Free
Deal Amount: \$5,000.00	\$5,000.00	\$5,000.00
Versions: BAY AREA, CA, Tab	BAY AREA, CA, Tab	BAY AREA, CA, Tab

Forecast Status: Unable To Forecast

Confidence: 0%

SKUs Forecas...: 0%

Coverage: 0%

Included SKUs: 1

Total SKUs: 1

Value Index: 0.0

Aff Value Index: 0.0

Help OK OK And New Cancel

1. From the Offer Details window, select the Performance & What-If tab.
2. Use the Setup option to choose the desired number of what-if scenarios and define offers. See [Setting Up What-If Scenarios](#) on page 5-37.
3. If desired, create a user forecast. See [Creating a User Forecast](#) on page 5-40.
4. Modify the properties of the generated What-If scenarios. Using either Vertical View or List View, select a scenario and modify the following option:
 - Enable or Disable Versions.
 - Using Vertical View, click the pencil icon from the Versions field of the desired What-If column. Alternatively, using List View, select the hyperlinked name of the version.

The Modify Versions window opens with the following panels:

- Positioned Versions
- Unpositioned Versions
- Other Vehicles

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

Figure 5–40 The Modify Versions Window

Modify Versions

Positioned Versions

Unpositioned Versions

☒ BAY AREA, CA

Offer Type: Buy 1

Offer Amount: Get 1 Free

Deal Amount: \$2,500.00

Store Count: 10

☐ MIAMI/FT. LAUDERDALE

Offer Type: Buy 1

Offer Amount: Get 1 Free

Deal Amount: \$2,500.00

Store Count:

Other Vehicles

OK Cancel

- Select the checkbox to enable a version or deselect the checkbox to disable a version.
 - Click **Ok** to save.
5. (Optional) Modify the Value Index. After setting up your what-if scenarios, entering a user forecast, modifying vehicles, and enabling/disabling offers, you can also modify the Value Index. See [Using the Value Index to Optimize Offers](#) on page 5-38.
 6. Click **Forecast** to update the metrics for the what-if scenarios.
 - If you have used the Value Index option, view your What-If scenarios using the List View option. Using the Value Index column, sort the values to determine the best offer.
 7. After viewing the forecast metrics,
 - If one of the What-If scenarios meets your requirements, click once onto the scenario, and select **Apply**. Your original offer will be updated with the attribute values from the What-If scenario you selected.
 - If none of the What-If scenarios meet your requirements, click **Reset** to reset the attribute values back to the original offer values. Repeat steps 2 through 6 if desired.

Creating a User Forecast

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

To create a user forecast at the offer level:

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

Figure 5-41 Create User Forecast Pop-Up Window

	Override	System
Tot Units/Store	<input type="text"/>	9.5
Avg Cost	<input type="text"/>	\$7.93
Avg Ad Price	<input type="text"/>	\$16.04

OK Cancel

- Tot Units/Store—enter a prediction for average units per store.
 - Avg Item Cost—enter an average item cost for the offer if you know of changes in future SKU costs that are not reflected in the system.
 - Avg Ad Price—enter the average ad price for the offer if you know of changes in future SKU prices that are not reflected in the system.
4. Click **OK** to generate a forecast based on the values you just entered for the User Forecast. After the forecast is generated, the new, user forecast values are visible within the Current Offer column. The System column retains the original system forecast.
 5. The System column's offer metrics display either up or down arrows to indicate whether they are higher or lower than the Current Offer metrics.
 6. To save:
 - Click **Ok** to save the Current Offer and System metrics. The Current Offer metrics become the current forecast metrics for the offer.
 - Click **Ok and New** to save the Current Offer and System metrics as noted above and to create a new offer.
 7. To discard your changes, click **Cancel**.

Removing a User Forecast

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

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

To remove a user forecast:

1. From the Offer tab, open the offer that contains the user forecast.
2. On the Offer Details window, select the Performance & What-If tab.
3. On the Performance & What-If tab, click **User Forecast**. The User Forecast window appears.

4. On the User Forecast window, clear the values in all the fields, and click **OK**.

Performing What-If Analysis with Offer Versions

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

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

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

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

Modifying Version Properties To modify the properties of a version:

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

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

Affinity Details

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

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

To view affinity details for an item:

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

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

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

Figure 5-42 Offer Affinity Window

[illegible]

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

Forecasting

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

About Forecasting

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

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

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

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

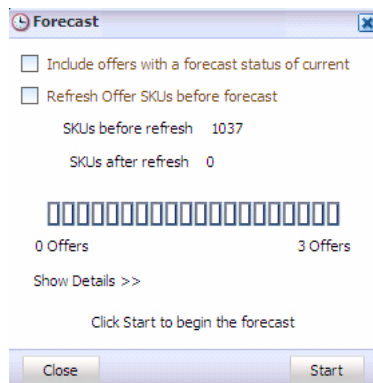
Forecasting Offers

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

1. Open the Offers Tab of the Promotion Manager.
 - To forecast a single offer, click once onto the desired offer to highlight its row.

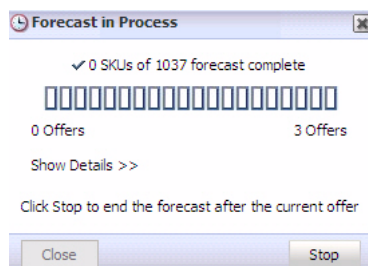
- To forecast all offers for the promotion, select no offers such that no rows are highlighted.
2. Click **Forecast**. Select one of the following options:
 - Start Now—start the forecast. If you select this option, skip to step 3.
 - Advanced Options—start the forecast but specify additional options.

Figure 5–43 Forecast Advanced Options

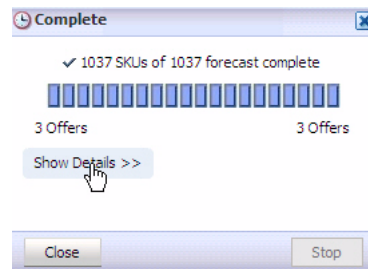


- Include offers with a forecast status of current—select the checkbox to forecast only offers that have a forecast status or current.
 - Refresh Offer SKUs before forecast—select the checkbox to refresh all SKUs within the offer before forecasting.
 - Click **Start** to begin the forecast.
3. The Forecast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

Figure 5–44 Forecast in Process Window



- (optional) Click Stop to stop the forecast after the current offer.
4. After the forecast is complete, you have the option of viewing SKU Details. Select **Show Details** to view the details.

Figure 5-45 Forecast Complete Window with Show Details Option

Forecast Statuses

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

- No Forecast—a forecast has never been run.
- Current—a forecast has run successfully.
- Partial, Unacceptable—used when the forecasted ratio is less than the configured threshold. See your system administrator for more information.
- Partial, Acceptable—displayed when the forecast ratio is greater than the configured threshold. See your system administrator for more information.
- Unable, No Baseline—a forecast cannot be run because the SKU's in the offer have no predict baseline. Open the SKU View to identify the problem SKUs.
- Unable, No Model—a forecast cannot be run because the SKU's in the offer have no model. Open the SKU View to identify the problem SKUs.
- Out of Date—a forecast is out of date because the offer changed.
- Failed, No Prediction—the forecast ran successfully but did not return a prediction.
- Failed, System Error— a forecast could not be run due to an error in the system. See your system administrator for assistance.
- Failed—a forecast request failed because the request could not be completed. Open the SKU View to identify the problem SKUs.
- Expired—a forecast status that only applies to offers that are updated via the pre-planned offer feed and the forecast task has not been re-run.
- Excluded—the "Include in Forecast" option is unchecked on the Offer Definition tab.
- No Baseline—no prediction baseline is available. Possible reasons: the promotion end date falls before the merchandise first predictable date or that the promotion begin date falls after the merchandise last predictable date.
- No Model—no model is assigned to the merchandise contained within the offer.
- No Prediction—a forecast was successfully run but a prediction failed to return.
- Error—a forecast request could not be completed.

Note: For User Entered Forecasts, the possible forecast statuses are as follows: Excluded, Unable to Forecast, and Current. For more information about the User Entered Forecast feature, see [Creating a User Forecast](#) on page 5-40.

Graph

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

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

Graph Types

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

Column Chart—%Performance

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

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

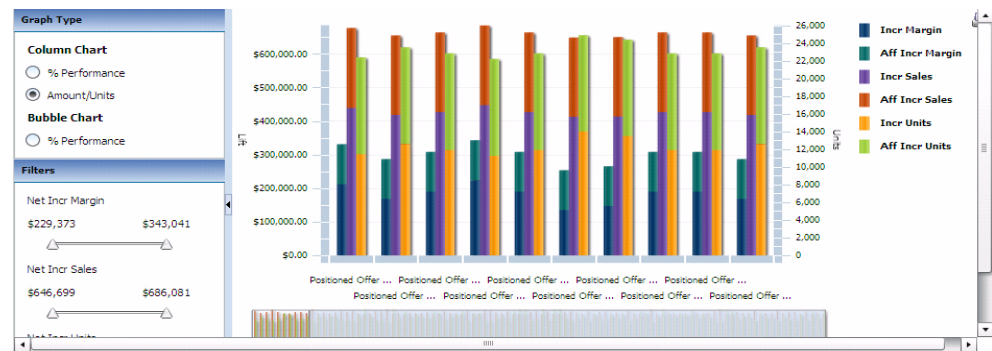
Figure 5-46 Column Chart—%Performance



Column Chart—Amount/Unit

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

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

Figure 5-47 Column Chart—Amount/Unit**Bubble Chart—%Performance**

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

Figure 5-48 Bubble Chart—%Performance**Viewing Graphs**

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

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

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

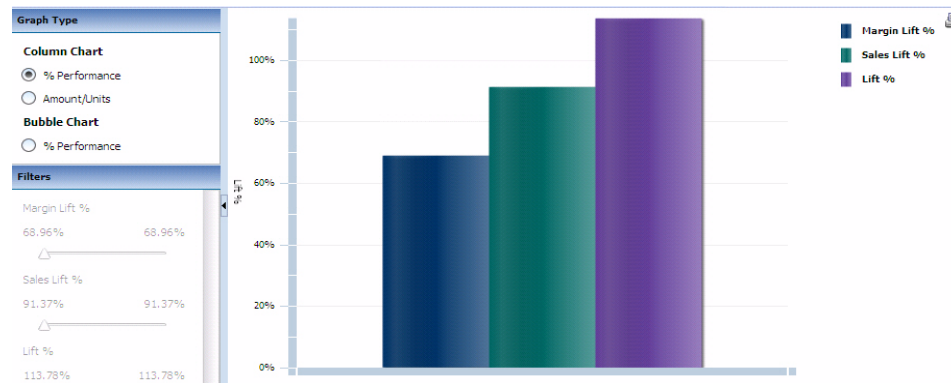
To view a graph from any of the above areas:

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

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

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

Figure 5–49 Promotion Performance Graph



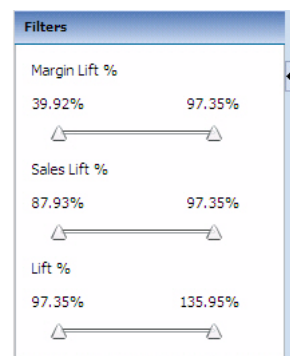
Showing/Hiding Graph Metrics

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

To hide graph metrics:

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

Figure 5–50 Graph Metrics—Using the Sliding Bar to Show/Hide Metrics

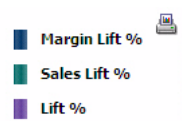


2. To redisplay metrics, select the arrow once again.

Printing Graphs

To print a promotion performance graph:

1. Follow the steps to view a promotion performance graph using [Viewing Graphs](#) on page 5-47.
2. Select the print icon located in the upper left corner of the graph.

Figure 5–51 Print Icon

Media Details

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

To include Media Details:

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

Figure 5–52 Offer Details Window—Media Details Tab

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

Figure 5–53 Images Search Window

The screenshot shows a software window titled "Images". Inside the window, there are three input fields: "File Name", "Keywords", and "Created After" (which includes a small calendar icon). Below these fields are two buttons: "Search" and "Clear". A horizontal line separates the input section from a section titled "Select Image", which contains a large, empty rectangular box for displaying image results. At the bottom of the window are "OK" and "Cancel" buttons.

- b. Enter search criteria.
 - **Filename**—enter all or part of the name of the file.
 - **Keywords**—enter keywords associated with the file.
 - **Created After**—select a date from the calendar.
- c. Click **Search**. Results appear in the Select Image list.
- d. Select the image to attach to the position. If no usable items are returned in your search results, select Clear.
- e. Click **OK**. The image is attached to the position and appears on the Position Details window.

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

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

Notes

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

Figure 5-54 Offer Details Window—Notes Tab

Adding Notes to a New Offer

To add notes to a new offer:

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

Adding Notes to an Existing Offer

To add notes to an existing offer:

1. Open an offer from the Offers tab of the Promotions Manager. The Offer Details window opens.
2. Follow steps 2 through 6 in [Adding Notes to a New Offer](#) on page 5-51.

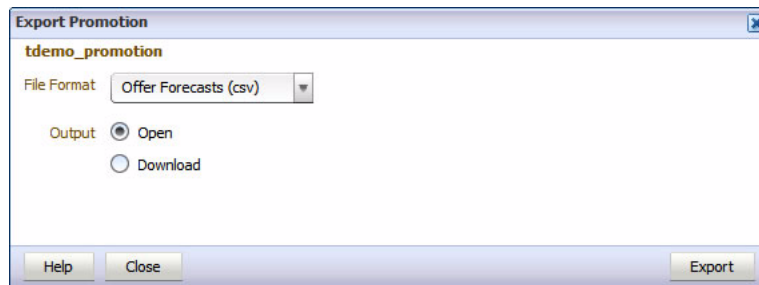
Export

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

To export a promotion:

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

Figure 5–55 *Export Promotion Window*



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

Vehicle Design

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

The following topics are available:

- [Understanding the Vehicle Design Window](#)
- [Understanding Vehicle Positions](#)
- [Managing Vehicle Pages](#)
- [Managing Vehicle Page Positions](#)
- [Managing Vehicle Page Position Content](#)

Understanding the Vehicle Design Window

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

Figure 6–1 Vehicle Design Tab of the Promotion Manager

Promotion: Summer Sale 06/29/2009 - 07/10/2009 Created

Summary Vehicles Vendor Deals Categories Offers Vehicle Design Workflow									
Add Delete Standard Weekly Circular Base Version All Pages List Legend									
Position Page									
#	Name	Type	Budget	ROI %	Lift %	Margin Lift %	Sales Lift %	Base Units/Store	Incr Units/Store
1	Feature 1-3 Front P	Front Page	\$1,666.67	0%	0%	0%	0%	0.0	0.0
2	Spread 1-3-3-4	Inside Page	\$1,666.67	0%	0%	0%	0%	0.0	0.0
3	Spread 1-3-3-4	Inside Page	\$1,666.67	0%	0%	0%	0%	0.0	0.0
4	Spread 1-3-3-4	Inside Page	\$1,666.67	0%	0%	0%	0%	0.0	0.0
5	Spread 1-3-3-4	Inside Page	\$1,666.67	0%	0%	0%	0%	0.0	0.0
6	Feature 1-3 Back Pa	Back Page	\$1,666.67	0%	0%	0%	0%	0.0	0.0

List View—All Pages

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

Table 6–1 Vehicle Design List View—All Pages

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

List View—Single Page

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

Figure 6–2 List View—Single Page

#	Position	Offer	Category Name	Category ID	Offer Name	Notes	Budget
1-1	Main Feature						\$416.67
1-2	Grid						\$416.67
1-3	Grid						\$416.67
1-4	Grid						\$416.67

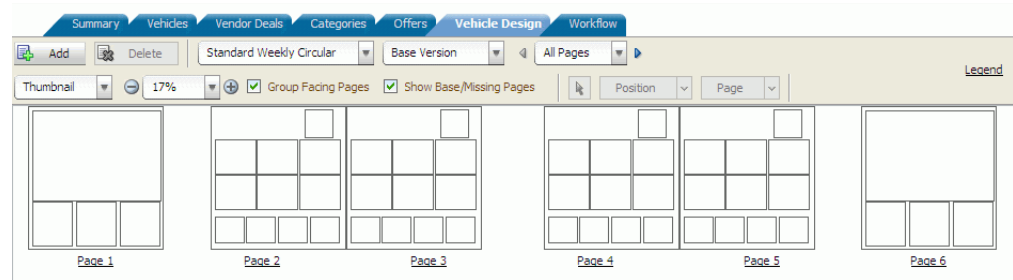
Table 6–2 Vehicle Design List View—Single Page

Field	Description
Expand/Collapse	Each row in the list represents a vehicle position. If an offer exists in that position, a +/- icon is located next to the row to expand and collapse the offers.
#	Page/Position or Page/Position/Offer
Position	Position Name
Offer	The name of the offer.
Position Menu	Displayed as a grid icon. Use this option to manage settings for positions on the page. For more information, see Editing Page Layout Using List View on page 6-12.
Category Name	Name of the category or categories assigned to the position. Hover your mouse over the row, and a small popup opens listing all category names assigned to the position.
Category ID	Comma separated list of all category ID numbers.
Offer Name	If an offer has already been added to the position, the offer name appears. If a category has been assigned to the position, the "Add" link is available to add an offer.
Notes	Notes from the position details or offer.

Thumbnail View—All Pages

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

Figure 6–3 Vehicle Design Thumbnail View All Pages



The following view options are available:

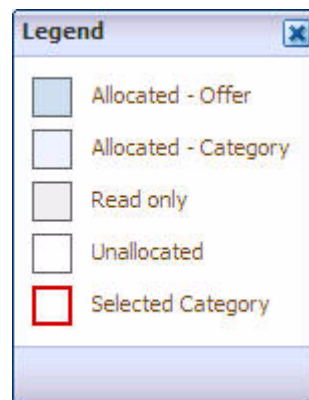
- Group Facing Pages—if this option is selected, facing pages will be displayed close together to provide a visual indication that they are facing pages.
- Show Base/Missing Pages—if this option is selected, only the base pages from the base version will be displayed.
- Custom View—Use the + and - buttons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

Vehicle Design Legend

Available within 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 6–4 Vehicle Design Legend



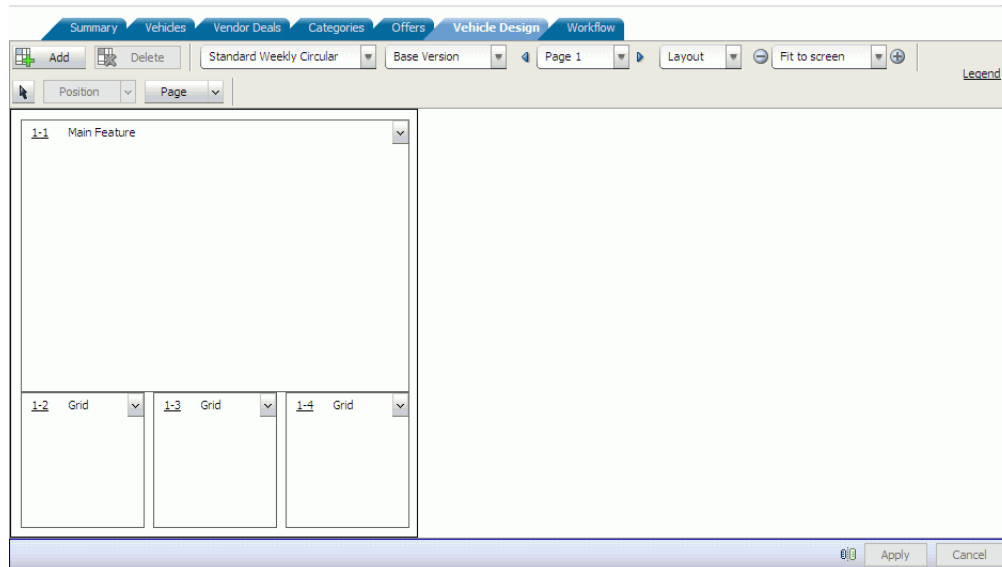
Informational Pop-ups

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.

Layout View—Single Page

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

Figure 6–5 *Layout View—Single Page*



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

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

Additional information that is also displayed is as follows:

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

Chart View—All Pages

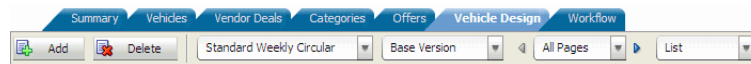
Use Chart view to view all pages within your vehicle in a performance graph format. Metric information is available for each page within your vehicle.

Viewing Vehicle Versions

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

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

Figure 6–6 Vehicle and Version Drop–Down Menus



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

Understanding Vehicle Positions

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

Position Details Window

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

The Position Details window displays two tabs: Offers and Categories. For more information, see [Assigning Categories to Vehicle Positions](#) on page 6-16 and [Placing an Existing Offer into a Position](#) on page 6-17.

Figure 6–7 *Position Details Window with the Offer Tab Selected*

[illegible]

The Position Details window displays the following information:

Table 6–3 Position Details—Available Information

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

Offers within the Position Details Window

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

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

- **Add**—if categories have already been assigned to the position, the add button is available to assign an offer to the position. For more information about assigning an offer to a position, see [Placing an Existing Offer into a Position](#) on page 6-17.
- **Clear**—use this option to remove an assigned offer. To delete the offer, click it once to highlight it. Click Clear to remove it.
- **List View**—view all offers assigned to the position in list form.
- **Chart View**—view all offers assigned to the position in a graph format. For more information about the graph, see [Graph](#) on page 5-46.

Table 6–4 Positioned Offers—Available Information

Field	Description
Position	The position and segment of the offer.

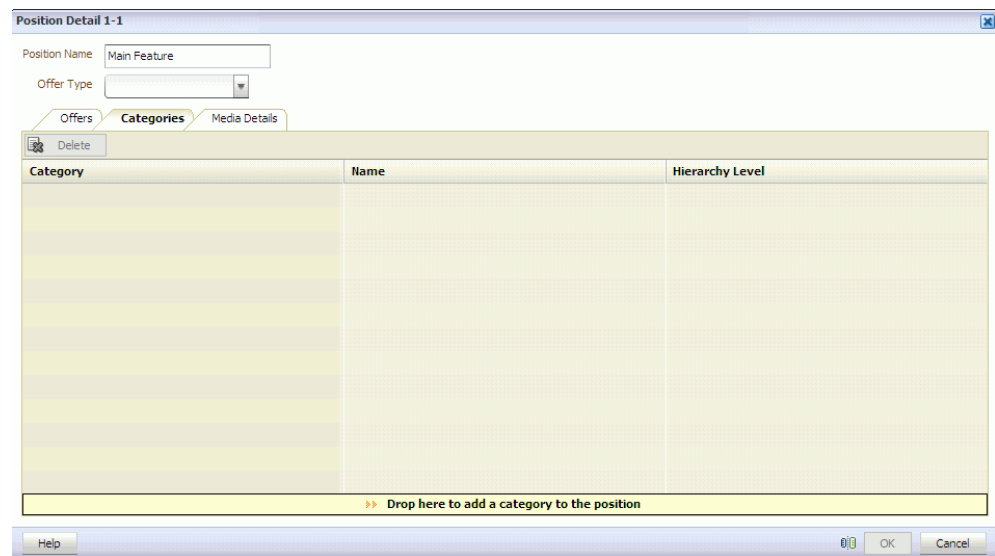
Table 6–4 (Cont.) Positioned Offers—Available Information

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

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

Categories within the Position Details Window

Use the Categories tab to manage the categories assigned to the position. View information about existing categories, add new categories, or delete categories. The categories tab provides the following information as shown in Table 5-7. For more information, see [Assigning Categories to Vehicle Positions](#) on page 6-16.

Figure 6–8 The Categories Tab of the Position Details Window**Table 6–5 Position Details Window—Assigned Category Information**

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

Media Details in the Position Details Window

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

Table 6–6 Position Details Window—Media Details Information

Field	Description
Position Name	Name of the position.
Offer Type	The offer types that are valid for assignment to this position.
Coupon #	If applicable, include a coupon number.
Image	If applicable, add an image for display in the promotion.
Headline	Enter headline text.
Body Copy	Enter body copy.
Notes	Add notes.

Figure 6–9 Position Details Window—Media Details Tab

The screenshot shows a software window titled "Position Detail 1-1". At the top, there are two tabs: "Offers" and "Categories". Below these, there is a "Media Details" tab which is currently selected. The "Media Details" tab contains several input fields: "Position Name" (with the text "Main Feature"), "Offer Type" (a dropdown menu), "Coupon #" (a text box), "Image" (a text box with a small icon to its right), "Headline" (a text box), "Body Copy" (a larger text box), and "Notes" (a text box). At the bottom of the window, there is a "Help" button on the left and "OK" and "Cancel" buttons on the right.

Managing Vehicle Pages

You have the following options to manage vehicle pages:

- [Viewing Pages in a Vehicle](#) on page 6-8.
- [Adding Pages to a Vehicle](#) on page 6-9.
- [Reordering Pages in a Vehicle](#) on page 6-9.
- [Deleting a Vehicle Page](#) on page 6-9.
- [Editing a Vehicle Page](#) on page 6-10.

Viewing Pages in a Vehicle

To view pages in a vehicle:

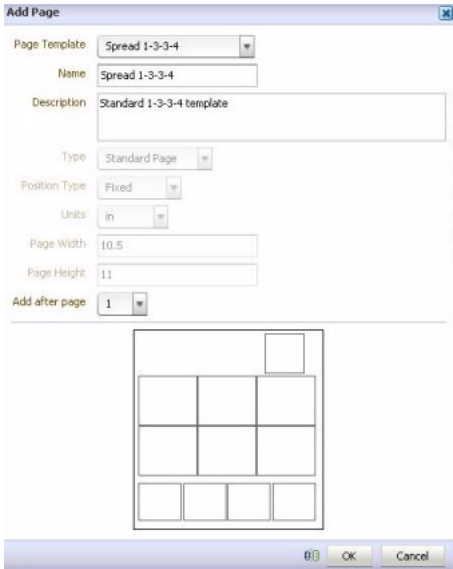
1. In List View—Select "All Pages" or individual page numbers from the Page List drop-down menu.
2. In Thumbnail View—Select "All Pages" or individual page numbers from the Page List drop-down menu. Use the "# of Pages Across" drop down menu to make additional adjustments.

Adding Pages to a Vehicle

To add pages to a vehicle:

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

Figure 6–10 Vehicle Design Add Page Window



2. **Page Template**—select the template to use.
3. **Add after page**—select where to add the page.

Note: The **Add after page** field appears as a drop down list for the base versions only. For versions other than the base version, this field appears as a text box.

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.

Note: You can reorder pages on base versions only.

Deleting a Vehicle Page

To delete pages from a vehicle:

1. Using List View or Thumbnail 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

Note: The **Add after page** field appears as a drop down list for the base versions only. For versions other than the base version, this field appears as a text box.

To edit a vehicle page:

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

Figure 6–11 *Vehicle Design Edit Page Window*

3. **New Template**—select a new template.
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:

- [Toolbar Options](#) on page 6-11.
- [Editing Page Layout Using List View](#) on page 6-12.

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

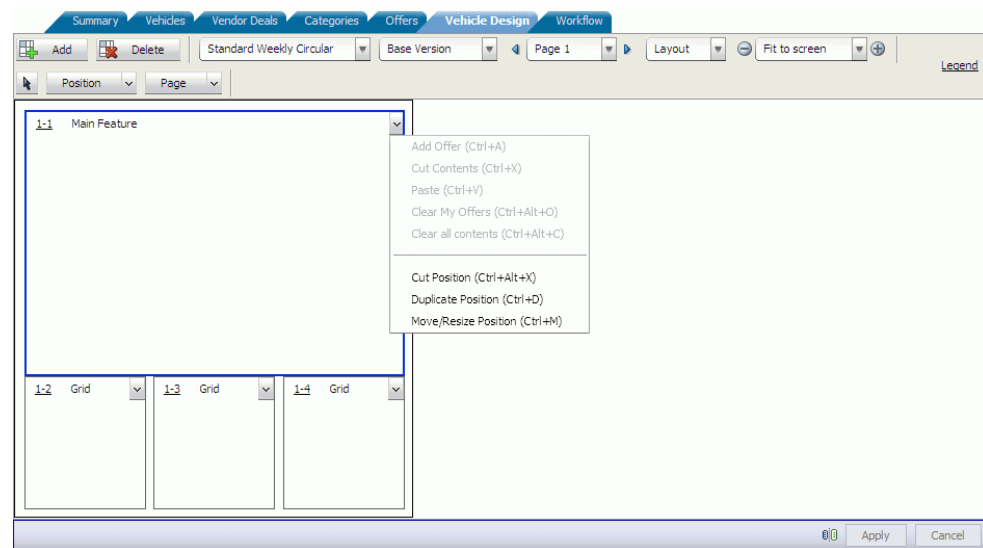
Using the Layout view within the vehicle design tab, you can change the layout of a page for a promotion. You have the following options for editing page layout using list view:

- [Dragging and Dropping Page Positions](#) on page 6-11.
- [Adding Page Positions](#) on page 6-13.
- [Cutting and Pasting Page Positions](#) on page 6-13.
- [Duplicating Page Positions](#) on page 6-14.
- [Moving/Resizing Positions: Using the Position Dimensions Pop-Up](#) on page 6-14.
- [Moving/Resizing Positions: Using the Toolbar Arrow](#) on page 6-14.
- [Deleting Page Positions](#) on page 6-15.

Toolbar Options

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

Figure 6-12 *Layout View—Position Menu Selected*



Dragging and Dropping Page Positions

To drag and drop positions:

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

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

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

Editing Page Layout Using List View

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

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

Figure 6–13 Editing Page Layout in List View—Position Menu, Page Menu & Arrow Icon

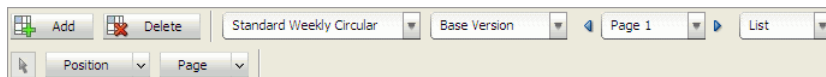


Figure 6–14 Editing Page Layout in List View—Close Up of Position Menu Grid

 A screenshot showing a close-up of the 'Position' menu grid. The toolbar at the top includes 'Add', 'Delete', 'Page 2', 'List', 'Fit to screen', and 'Position'/'Page' dropdowns. The grid below has columns for '#', 'Position', 'Category Name', 'Category ID', 'Offer Name', and 'Offer'.

#	Position	Category Name	Category ID	Offer Name	Offer
21	Main Feature	Bakeware	7	Add	

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

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

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

- Select a position by clicking once into its row.
- Click once onto the Position menu (see Figure 6-5). Select **Cut Position**.
- The position is cut from the page. Click **Apply** to save changes to the page.
- To paste the position to a new page, navigate to the new page. From the Position menu, select **Paste Position**.
- Click **Apply** to save your changes.

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

- Select a position by clicking once into its row.
- Click onto the Position menu. Select **Duplicate Position**.
- A new position is added to the bottom of the list.
- 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 6–15 Position Dimensions Window

Field	Value	Unit
Position	Grid	
X Coordinate	0.25	in
Y Coordinate	7.25	in
Width	3.2	in
Height	3.5	in

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

Deleting Page Positions To delete a page position:

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

Adding Page Positions

To add a position to a page in layout view:

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

Cutting and Pasting Page Positions

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

1. Select a position.
2. In the upper right corner of the selected position, click onto the drop-down menu.
3. Select either **Cut Position**.

4. Navigate the page where you want to paste the position. From the Page drop-down menu, select **Paste Position**. 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:

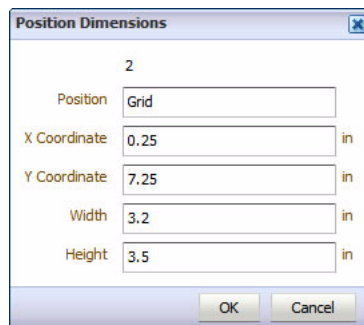
1. Select a position.
2. In the upper right corner of the selected position, click onto the drop-down menu.
3. Select **Duplicate Position**.
4. A new position with the same dimensions as the original position is placed in the bottom right corner of the page.
5. Click **Apply** to save your changes.

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 6-16 *Position Dimensions Window*



Field	Value	Unit
Position	Grid	
X Coordinate	0.25	in
Y Coordinate	7.25	in
Width	3.2	in
Height	3.5	in

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.

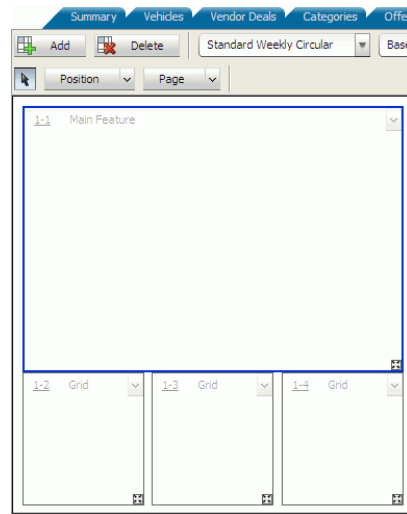
Moving/Resizing Positions: Using the Toolbar Arrow

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 6–17 *Resize Position Drag Handles*



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

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

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:

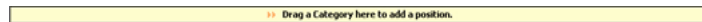
- [Assigning Categories to Vehicle Positions](#) on page 6-16.
- [Placing an Existing Offer into a Position](#) on page 6-17.
- [Cutting, Pasting, and Clearing Offers](#) on page 6-16.
- [Clearing an Offer from a Position](#) on page 6-17

Assigning Categories to Vehicle Positions

To assign categories to positions within a promotion vehicle:

1. Select a Page
 - Using List View, select a page and open it. Select the desired position/segment number.
 - Using 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 5-15 for more information.

Figure 6–18 Drag Category Here Bar



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

Cutting, Pasting, and Clearing Offers

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

Positioning Offers within a Vehicle

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

Placing an Existing Offer into a Position

To place an existing offer into a position:

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

Create and Position a New Offer

To create and position a new offer:

1. Open a page, and select the **Add Offer** option.
 - In List View, open a page. Positions/segments with category assignments will have the "Add" link available within the "Offer Name" column. Select the link from row of the desired position/segment to add an offer.
 - In 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 5-22.

Clearing an Offer from a Position

To clear an offer from a position:

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

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

About Workflow

Standard workflow phases include:

- Created
- Planning
- Running
- Completed

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

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

Adding a Task

To add a task to the workflow:

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

Figure 7–1 Promotion Manager Workflow Tab

Summary Vehicles Vendor Deals Categories Offers Vehicle Design Workflow								
Add		Delete		Start		Complete		Approve Deny
Phase	Name	Phase Status	WF Status	Start Date	End Date	My Task	Assigned To	Priority
Created			Not Started	12/15/2008	01/26/2009			
Post Review and Mark			Not Started	12/15/2008	12/26/2008			Medium
Space Allocation Meet			Not Started		01/26/2009			
Planning			Not Started	02/09/2009	06/11/2009			
Marketing Ideas Kickoff			Not Started	02/09/2009	02/12/2009			Medium
Rough Layouts			Not Started	02/23/2009	03/06/2009			Medium
Layout Review			Not Started		03/09/2009			
Photography and Digit			Not Started	03/23/2009	04/17/2009			Medium
Build 1st Proof			Not Started	05/29/2009	06/11/2009			Medium
Copy Write			Not Started	03/23/2009	04/03/2009			Medium
1st Proof Review			Not Started		04/20/2009			
Forecast Signoff			Not Started	04/20/2009	04/22/2009			Medium
Art Hand-Off			Not Started		04/27/2009			
Reviewing			Not Started					
Revising			Not Started					
Finalizing			Not Started					

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

Figure 7–2 Task Details Window

Task Details

Summer Sale

Phase Created

Name Store Opening Planning

Description

Priority High

Approval Task

Planned Date

Start 06/29/2009

End 07/03/2009

Actual Date

Start 06/24/2009

End

Complete

Notes

Assignments

Edit

Name	Status	Start	End	Note
Smith, Ken R	Not Started			

OK Cancel

4. **Phase**—select the phase that the task is a part of.
5. **Name**—enter a name for the task.
6. **Description**—enter a description of the task.
7. **Priority**—select a priority for the task.
8. If the task is an approval task, select Approval Task checkbox.

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

Figure 7-3 Users Search Window

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

Adding a Milestone

To add a milestone to the workflow:

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

Figure 7–4 Milestone Details Window

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

Removing Tasks or Milestones

To remove a task or milestone from the workflow:

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

Note: Phases cannot be deleted.

Starting Phases or Tasks

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

To start a phase or task:

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

To begin a task assigned to you:

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

Figure 7–5 My Task Start Window

The 'My Task Start' window displays the following information for the task 'tdemo_promotion':

- Phase:** Created
- Name:** Summer Sale
- Description:** Summer Sale
- Priority:** Medium

Below this information is a text area labeled 'Note'.

At the bottom right are buttons for 'OK' and 'Cancel'.

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

Editing Phase Details

To edit phase details:

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

Figure 7–6 Phase Details Window

The 'Phase Details' window for the 'Summer Sale' phase contains the following fields:

- Name:** A text box containing 'Planning'.
- Phase Status:** A dropdown menu currently set to 'None'.
- Planned Date:** Two date fields. 'Start' is 02/09/2009 and 'End' is 06/11/2009.
- Actual Date:** Two date fields with calendar icons. Both are currently empty.
- Complete:** A checkbox that is currently unchecked.

At the bottom right are buttons for 'OK' and 'Cancel'.

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

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

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

Completing Phases, Tasks, or Milestones

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

Completing a Phase or Task

To complete a phase or task:

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

Completing an Assigned Task

To complete an assigned task:

1. Select the task from the Workflow window.
2. Click **Complete**. The My Task Complete window opens.
3. **Note**—enter notes.
4. Click **OK**.

Completing Milestones

To complete a milestone:

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

Un-Starting a Task

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

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

Un-Starting an Approval Task

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

1. From the My Tasks Status column of the Workflow tab, select one of your assigned tasks. The My Task Status window opens as follows:

2. Select **Pending Approval**. Click **Ok**.

Approving and Denying Tasks

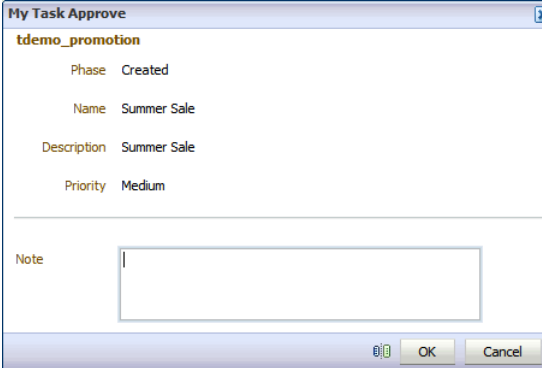
Approval tasks are those that require the approval of users with assignments on the task.

Approving a Task

To approve a task:

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

Figure 7-7 My Task Approve Window



The screenshot shows a dialog box titled "My Task Approve". Inside, the task name "tdemo_promotion" is at the top. Below it, several fields are listed: "Phase" with the value "Created", "Name" with "Summer Sale", "Description" with "Summer Sale", and "Priority" with "Medium". A horizontal line separates these fields from a "Note" section, which contains a large empty text box. At the bottom right of the dialog are two buttons: "OK" and "Cancel".

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

Denying Tasks

To deny a task:

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

Figure 7–8 My Task Approval Window

The screenshot shows a window titled "My Task Deny" with a close button in the top right corner. Inside the window, the task ID "tdemo_promotion" is displayed in bold. Below it, the following details are listed:

- Phase: Created
- Name: Summer Sale
- Description: Summer Sale
- Priority: Medium

A horizontal line separates these details from a "Note" section, which contains a large text input area. At the bottom of the window, there are two buttons: "OK" and "Cancel".

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

Performance Metrics

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

The following metrics are provided:

- [Categories—Individual Category Metrics](#) on page A-1.
- [Categories—Total Category Performance Metrics](#) on page A-3.
- [Offers—Individual Offer Performance](#) on page A-5.
- [Offers—Total Offer Performance](#) on page A-6.
- [Offers—Offer Details Window—Get or Buy SKU View](#) on page A-8.
- [The Vertical Tab—Promotion Performance Metrics](#) on page A-10.
- [Vehicle Design—List View—All Pages View](#) on page A-12.
- [Vehicle Design—Thumbnail View—All Pages—Individual Page Mouseover](#) on page A-13.
- [Vehicle Design—List View—Single Page Metrics](#) on page A-13.
- [Vehicle Design—Layout View—Single Page Metrics Page Mouseover](#) on page A-15.
- [Performance & What-If Metrics](#) on page A-15.
- [Vehicle Design—Position Detail Window—Offers Tab—Individual Offer Performance](#) on page A-17.

Categories—Individual Category Metrics

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

Table A-1 *Categories—Individual Category Performance Metrics*

Metric	Definition
Target	User entered. This value is entered by the user at the time categories are allocated to the promotion.
Actual	(number of positions assigned this category / total number of positions) * 100.

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

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

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

Metric	Definition
Net Base Gross Margin	$(\text{Base Margin} / \text{Base Sales}) * 100.$
Net Incr Gross Margin	$(\text{Incr Margin} / \text{Incr Sales}) * 100.$
Net Total Gross Margin	$(\text{Total margin} / \text{Total Sales}) * 100.$
Base Gross Margin	$(\text{Net Base Gross Margin} + \text{Aff Base Gross Margin}).$
Incr Gross Margin	$(\text{Net Incr Gross Margin} + \text{Aff Incr Gross Margin}).$
Aff Base Gross Margin	$(\text{Aff Base Margin} / \text{Aff Base Sales}) * 100.$
Total Gross Margin	$(\text{Net Total Gross Margin} + \text{Aff Total Gross Margin}).$
Aff Incr Gross Margin	$(\text{Aff Incr Margin} / \text{Aff Incr Sales}) * 100.$
Aff Total Gross Margin	$(\text{Aff Total Margin} / \text{Aff Total Sales}) * 100.$
Net Incr Units	$(\text{Incr Units} + \text{Aff Incr Units}).$
Net Total Units	$(\text{Total Units} + \text{Aff Total Units}).$
Net Base Sales	$(\text{Base Sales} + \text{Aff Base Sales}).$
Net Base Margin	$(\text{Base Margin} + \text{Aff Base Margin}).$
Net Base Units	$(\text{Base Units} + \text{Aff Base Units}).$
Net Total Sales	$(\text{Total Sales} + \text{Aff Total Sales}).$
Net Total Margin	$(\text{Total Margin} + \text{Aff Total Margin}).$

Categories—Total Category Performance Metrics

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

Table A-2 Categories—Total Category Performance Metrics

Metric	Definition
Target	User entered. This value is entered by the user at the time categories are allocated to the promotion.
Actual	$(\text{number of positions assigned this category} / \text{total number of positions}) * 100.$
ROI	$(\text{Incremental Margin} / (\text{Promotion Budget} / \text{total number of offers})) * 100$, where the number of offers is based on a configuration setting that determines whether to count unpositioned offers.
Lift%	$((\text{Total Units} - \text{Base Units}) / \text{Base Units}) * 100.$
Margin Lift%	$((\text{Total Incremental Margin} - \text{Base Margin}) / \text{Base Margin}) * 100.$
Sales Lift%	$((\text{Total Incremental Sales} - \text{Base Sales}) / \text{Base Sales}) * 100.$
Base Units/Store	Average number of base units sold per store.
Incr Units/Store	$(\text{Total Units/Store}) - (\text{Base Units/Store}).$
Tot Units/Store	Average number of total units sold per store.
Base Units	Sum of Base Units for all categories.
Incr Units	Sum of Incremental Units for all categories.

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

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

Offers—Individual Offer Performance

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

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

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

Table A–3 (Cont.) Offers Tab—Individual Offer Details and Metric Definitions

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

Offers—Total Offer Performance

In addition to displaying metrics for all individual offers, the Offers Tab also displays Total Offer Performance for all Offers in a promotion. Total offer performance metrics are displayed in [Table A–4, "Offers Tab—Individual Offer Details and Metric Definitions"](#).

Table A–4 Offers Tab—Individual Offer Details and Metric Definitions

Metric	Definition
ROI	(Incremental Margin / (Promotion Budget / 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.
Margin Lift%	((Total Incremental Margin - Base Margin) / Base Margin) * 100.
Sales Lift%	((Total Incremental Sales - Base Sales) / Base Sales) * 100.

Table A-4 (Cont.) Offers Tab—Individual Offer Details and Metric Definitions

Metric	Definition
Base Units/Store	Average number of base units sold per store.
Incr Units/Store	(Total Units/Store) - (Base Units/Store).
Tot Units/Store	Average number of total units sold per store.
Avg Base Units/Store	Average Base Units for all items per store.
Avg Incr Units/Store	Average Incremental Units per store.
Avg Total Units/Store	Average Total Units for all items per store.
Base Units	Sum of Base Units for all items.
Incr Units	Sum of Incremental Units for all items.
Tot Units	Sum of Total Units for all items.
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.
Net Incr Sales	Affinity Incremental Sales + Incremental Sales.
Net Incr Margin	Affinity Incremental Margin + Incremental Margin.
Net Base Gross Margin	(Base Margin / Base Sales) * 100.
Net Incr Gross Margin	(Incr Margin / Incr Sales) * 100.
Net Total Gross Margin	(Total margin / Total Sales) * 100.
Base Gross Margin	(Net Base Gross Margin + Aff Base Gross Margin).
Incr Gross Margin	(Net Incr Gross Margin + Aff Incr Gross Margin).
Aff Base Gross Margin	(Aff Base Margin / Aff Base Sales) * 100.
Total Gross Margin	(Net Total Gross Margin + Aff Total Gross Margin).
Aff Incr Gross Margin	(Aff Incr Margin / Aff Incr Sales) * 100.
Aff Incr Gross Margin	(Aff Incr Margin / Aff Incr Sales) * 100.
Aff Incr Gross Margin	(Aff Incr Margin / Aff Incr Sales) * 100.
Net Incr Units	(Incr Units + Aff Incr Units).

Table A–4 (Cont.) Offers Tab—Individual Offer Details and Metric Definitions

Metric	Definition
Aff Incr Gross Margin	(Aff Incr Margin / Aff Incr Sales) * 100.
Net Total Units	(Total Units + Aff Total Units).
Net Base Sales	(Base Sales + Aff Base Sales).
Net Base Margin	(Base Margin + Aff Base Margin).
Net Base Units	(Base Units + Aff Base Units).
Net Total Sales	(Total Sales + Aff Total Sales).
Net Total Margin	(Total Margin + Aff Total Margin).
Value Index	A score of the promotion effectiveness of an offer based on the performance of ad items. It provides a weighted value that takes the incremental lift of revenue, profit, and units of the ad item into consideration. The weightings are configurable.
Affinity Value Index	A score of the promotion effectiveness of an offer based on the performance of affinity items. It provides a weighted value that takes the incremental lift of revenue, profit, and units of the affinity items into consideration. The weightings are configurable.
Total Value Index	A score of the overall promotion effectiveness of an offer based on the performance of ad items and affinity items. It is the sum of the Value Index and the Aff Value Index (minus the Value Index Offset).

Offers—Offer Details Window—Get or Buy SKU View

When an offer is opened from the Offers tab of the Promotion Manager, the Offer Details window is used to display details related to the offer. For offers of the Buy One Get One type, performance metrics are displayed for that offer when using either Buy SKU view or Get SKU view. SKU related metrics are available in [Table A–5, "Offer Details Window—Offer Definition Tab—Get or Buy SKU View Performance Metrics"](#).

Table A–5 Offer Details Window—Offer Definition Tab—Get or Buy SKU View Performance Metrics

Metric	Definition
Item ID	Item ID number.
Name	Name of the item.
Supplier ID	Supplier ID number.
Supplier Name	Name of the supplier.
Item Cost	Purchase price of the item.
Item Price	Regular retail price.
Ad Price	Price based on the corresponding offer discount.
Savings	Item Price - Ad Price.
Avg Ticket Price	Average Item Price
Avg Ad Price	Average Ad Price
Avg Selling Price	Avg Item Price
Avg Selling Cost	The average of an item's Actual Cost during the specified baseline period.

Table A-5 (Cont.) Offer Details Window—Offer Definition Tab—Get or Buy SKU View Performance Metrics

Metric	Definition
Effective Sav%	Percent of price reduction based on Item Price and the corresponding offer type.
Forecast Status	Status of the forecast.
Stores Forecasted	The number of forecasted stores.
Confidence	Level of confidence in the system generated forecast metrics. See Forecast Confidence Indicator on page 5-19.
ROI	$(\text{Incremental Margin} / \text{Budget}) * 100$.
Lift%	$((\text{Total Units} - \text{Base Units}) / \text{Base Units}) * 100$.
Margin Lift%	$((\text{Total Incremental Margin} - \text{Base Margin}) / \text{Base Margin}) * 100$.
Sales Lift%	$((\text{Total Incremental Sales} - \text{Base Sales}) / \text{Base Sales}) * 100$.
Base Units/Store	Average number of base units sold per store.
Incr Units/Store	$(\text{Total Units} / \text{Store}) - (\text{Base Units} / \text{Store})$.
Tot Units/Store	Average number of total units sold 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.
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 of 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.
Net Incr Units	Affinity Incremental Units + Incremental Units.
Net Incr Sales	Affinity Incremental Sales + Incremental Sales
Net Incr Margin	Affinity Incremental Margin + Incremental Margin
Aff Base Gross Margin	$(\text{Aff Base Margin} / \text{Aff Base Sales}) * 100$.
Aff Incr Gross Margin	$(\text{Aff Incr Margin} / \text{Aff Incr Sales}) * 100$.
Aff Total Gross Margin	$(\text{Aff Total Margin} / \text{Aff Total Sales}) * 100$.

Table A-5 (Cont.) Offer Details Window—Offer Definition Tab—Get or Buy SKU View Performance Metrics

Metric	Definition
Net Base Gross Margin	$(\text{Base Margin} / \text{Base Sales}) * 100.$
Net Incr Gross Margin	$(\text{Incr Margin} / \text{Incr Sales}) * 100.$
Net Total Gross Margin	$(\text{Total margin} / \text{Total Sales}) * 100.$
Base Gross Margin	$(\text{Net Base Gross Margin} + \text{Aff Base Gross Margin}).$
Incr Gross Margin	$(\text{Net Incr Gross Margin} + \text{Aff Incr Gross Margin}).$
Total Gross Margin	$(\text{Net Total Gross Margin} + \text{Aff Total Gross Margin}).$

The Vertical Tab—Promotion Performance Metrics

Promotion performance metrics are available from the Vertical Tab. Promotion performance metrics are listed in [Table A-6, "Vertical Tab—Promotion Performance Metrics"](#).

Table A-6 Vertical Tab—Promotion Performance Metrics

Metric	Definition
Forecast Status	Status of the Forecast. Possible outcomes are as follows: Not forecasted, Current, Partial, Unable to Forecast, Out of Date, Failed, Expired, Excluded, No Baseline, No Model, No Prediction, and Error. For detailed definitions of these statuses, refer to Forecast Statuses on page 5-45 in Chapter 5, "Promotions" .
Offers Forecasted	The percentage of forecasted offers.
ROI	$(\text{Incremental Margin} / (\text{Promotion Budget} / \text{total number of offers})) * 100$, where the number of offers is based on a configuration setting that determines whether to count unpositioned offers.
Lift%	$((\text{Total Units} - \text{Base Units}) / \text{Base Units}) * 100.$
Base Units/Store	Average number of base units sold per store.
Incr Units/Store	$(\text{Total Units/Store}) - (\text{Base Units/Store}).$
Tot Units/Store	Average number of total units sold per store.
Base Units	Sum of Base Units for all offers.
Incr Units	Sum of Incremental Units for all offers.
Tot Units	Sum of Total Units for all offers.
Base Sales	Sum of Base Sales for all offers.
Incr Sales	Sum of Incremental Sales for all offers.
Tot Sales	Sum of Total Sales for all offers.
Base Margin	Sum of Base Margin for all positioned offers.
Incr Margin	Sum of Incremental Margin for all offers.
Tot Margin	Sum or Total Margin for all offers.
Aff Base Units	Sum of Affinity Base Units for all offers.
Aff Incr Units	Sum of Affinity Incremental Units for all offers.
Aff Total Units	Sum of Affinity Total Units for all locations.

Table A-6 (Cont.) Vertical Tab—Promotion Performance Metrics

Metric	Definition
Aff Base Sales	Sum of Affinity Base Sales for all offers.
Aff Incr Sales	Sum of Affinity Incremental Sales for all offers.
Aff Total Sales	Sum of Affinity Total Sales for all offers.
Aff Base Margin	Sum of Affinity Base Margin for all offers.
Aff Incr Margin	Sum of Affinity Incremental Margin for all offers.
Aff Tot Margin	Sum of Affinity Total Margin for all offers.
Net Incr Units	Affinity Incremental Units + Incremental Units.
Net Incr Sales	Affinity Incremental Sales + Incremental Sales.
Net Incr Margin	Affinity Incremental Margin + Incremental Margin.
#Offers	Total number of offers.
High Confidence Offers%	Percentage of offers with a high confidence forecast.
Medium Confidence Offers%	Percentage of offers with a medium confidence forecast.
Low Confidence Offers%	Percentage of offers with a low confidence forecast.
No Confidence Offers%	Percentage of offers with a no confidence forecast.
User—High Confidence Offers%	Percentage of offers with a high confidence, system forecast that also have user overridden metrics.
User—Medium Confidence Offers%	Percentage of offers with a medium confidence, system forecast that also have user overridden metrics.
User—Low Confidence Offers%	Percentage of offers with a low confidence, system forecast that also have user overridden metrics.
User—No Confidence Offers%	Percentage of offers with a no confidence, system forecast that also have user overridden metrics.
Margin Lift%	$((\text{Total Incremental Margin} - \text{Base Margin}) / \text{Base Margin}) * 100.$
Sales Lift%	$((\text{Total Incremental Sales} - \text{Base Sales}) / \text{Base Sales}) * 100.$
Aff Base Gross Margin	$(\text{Aff Base Margin} / \text{Aff Base Sales}) * 100.$
Aff Incr Gross Margin	$(\text{Aff Incr Margin} / \text{Aff Incr Sales}) * 100.$
Aff Total Gross Margin	$(\text{Aff Total Margin} / \text{Aff Total Sales}) * 100.$
Net Base Gross Margin	$(\text{Base Margin} / \text{Base Sales}) * 100.$
Net Incr Gross Margin	$(\text{Incr Margin} / \text{Incr Sales}) * 100.$
Net Total Gross Margin	$(\text{Total margin} / \text{Total Sales}) * 100.$
Base Gross Margin	$(\text{Net Base Gross Margin} + \text{Aff Base Gross Margin}).$
Incr Gross Margin	$(\text{Net Incr Gross Margin} + \text{Aff Incr Gross Margin}).$
Total Gross Margin	$(\text{Net Total Gross Margin} + \text{Aff Total Gross Margin}).$

Vehicle Design—List View—All Pages View

Using List View for All Pages within the Vehicle Design tab, you will see the following metrics. [Table A-7, "Vehicle Design—List View—All Pages"](#) provides more detail.

Table A-7 Vehicle Design—List View—All Pages

Metric	Definition
ROI	Net profit for a particular ad even as a percent of the cost of the ad circular.
Lift%	$((\text{Total Units} - \text{Base Units}) / \text{Base Units}) * 100$.
Margin Lift%	$((\text{Total Incremental Margin} - \text{Base Margin}) / \text{Base Margin}) * 100$.
Sales Lift%	$((\text{Total Incremental Sales} - \text{Base Sales}) / \text{Base Sales}) * 100$.
Base Units/Store	Average number of base units sold per store.
Incr Units/Store	$(\text{Total Units/Store}) - (\text{Base Units/Store})$.
Tot Units/Store	Average number of total units sold 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.
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 all pages.
Base Margin	Sum of Base Margin for all positioned offers on all pages.
Incr Margin	Sum of Incremental Margin for all positioned offers on all pages.
Tot Margin	Sum of Total Margin for all positioned offers on all pages.
Aff Base Units	Sum of Affinity Base Units for all items.
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 Tot 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.
Net Incr Units	Affinity Incremental Units + Incremental Units.
Net Incr Sales	Affinity Incremental Sales + Incremental Sales.
Net Incr Margin	Affinity Incremental Margin + Incremental Margin.
Aff Base Gross Margin	$(\text{Aff Base Margin} / \text{Aff Base Sales}) * 100$.
Aff Incr Gross Margin	$(\text{Aff Incr Margin} / \text{Aff Incr Sales}) * 100$.
Aff Total Gross Margin	$(\text{Aff Total Margin} / \text{Aff Total Sales}) * 100$.

Table A-7 (Cont.) Vehicle Design—List View—All Pages

Metric	Definition
Net Base Gross Margin	$(\text{Base Margin} / \text{Base Sales}) * 100.$
Net Incr Gross Margin	$(\text{Incr Margin} / \text{Incr Sales}) * 100.$
Net Total Gross Margin	$(\text{Total margin} / \text{Total Sales}) * 100.$
Base Gross Margin	$(\text{Net Base Gross Margin} + \text{Aff Base Gross Margin}).$
Incr Gross Margin	$(\text{Net Incr Gross Margin} + \text{Aff Incr Gross Margin}).$
Total Gross Margin	$(\text{Net Total Gross Margin} + \text{Aff Total Gross Margin}).$

Vehicle Design—Thumbnail View—All Pages—Individual Page Mouseover

If you use Thumbnail View for All Pages within the Vehicle Design window, you have the option of hovering your mouse over an individual page and seeing metrics for those pages. [Table A-8, "Vehicle Design—Thumbnail View—All Pages—Individual Page Mouseover"](#) provides more detail.

Table A-8 Vehicle Design—Thumbnail View—All Pages—Individual Page Mouseover

Metric	Definition
ROI	$(\text{Incremental Margin} / (\text{Promotion Budget} / \text{total number of pages})) * 100.$
Lift%	$((\text{Total Units} - \text{Base Units}) / \text{Base Units}) * 100.$
Margin Lift%	$((\text{Total Incremental Margin} - \text{Base Margin}) / \text{Base Margin}) * 100.$
Sales Lift%	$((\text{Total Incremental Sales} - \text{Base Sales}) / \text{Base Sales}) * 100.$
Base Sales	Sum of Base Sales for all positioned offers on the page.
Incr Sales	Sum of Incremental Sales for all positioned offers on the page.
Tot Sales	Sum of Total Sales for all positioned offers on the page.
Base Margin	Sum of Base Margin for all positioned offers on the page.
Incr Margin	Sum of Incremental Margin for all positioned offers on the page.
Tot Margin	Sum of Total Margin for all positioned offers on the page.
Base Units	Sum of Base Units for all items.
Incr Units	Sum of Incremental Units for all items.
Tot Units	Sum of Total Units for all items.

Vehicle Design—List View—Single Page Metrics

Single page metrics are available when using list view within the Vehicle Designer. [Table A-9, "Vehicle Design—List View—Single Page Metrics"](#) provides more detail.

Table A-9 Vehicle Design—List View—Single Page Metrics

Metric	Definition
ROI	$(\text{Incremental Margin} / (\text{Promotion Budget} / \text{total number of offers})) * 100,$ where the number of offers is based on a configuration setting that determines whether to count unpositioned offers.
Lift%	$((\text{Total Units} - \text{Base Units}) / \text{Base Units}) * 100.$

Table A-9 (Cont.) Vehicle Design—List View—Single Page Metrics

Metric	Definition
Margin Lift%	$((\text{Total Incremental Margin} - \text{Base Margin}) / \text{Base Margin}) * 100.$
Sales Lift%	$((\text{Total Incremental Sales} - \text{Base Sales}) / \text{Base Sales}) * 100.$
Base Units/Store	Average number of base units sold per store.
Incr Units/Store	$(\text{Total Units/Store}) - (\text{Base Units/Store}).$
Tot Units/Store	Average Total Units sold 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.
Base Sales	Sales (or predicted sales) generated by the focus item during the baseline period.
Incr Sales	Sum of Incremental Sales.
Tot Sales	Sum of Total Sales.
Base Margin	Sum of Base Margin.
Incr Margin	Sum of Incremental Margin.
Tot Margin	Sum of Total Margin.
Aff Base Units	Sum of Affinity Base Units.
Aff Incr Units	Sum of Affinity Incremental Units.
Aff Tot Units	Sum of Affinity Total Units.
Aff Base Sales	Sum of Affinity Base Sales.
Aff Incr Sales	Sum of Affinity Incremental Sales.
Aff Tot Sales	Sum of Affinity Total Sales.
Aff Base Margin	Sum of Affinity Base Margin for all items.
Aff Incr Margin	Sum of Affinity Incremental Margin.
Aff Tot Margin	Sum of Affinity Total Margin.
Net Incr Units	Affinity Incremental Units + Incremental Units.
Net Incr Sales	Affinity Incremental Sales + Incremental Sales.
Net Incr Margin	Affinity Incremental Margin + Incremental Margin.
Aff Base Gross Margin	$(\text{Aff Base Margin} / \text{Aff Base Sales}) * 100.$
Aff Incr Gross Margin	$(\text{Aff Incr Margin} / \text{Aff Incr Sales}) * 100.$
Aff Total Gross Margin	$(\text{Aff Total Margin} / \text{Aff Total Sales}) * 100.$
Net Base Gross Margin	$(\text{Base Margin} / \text{Base Sales}) * 100.$
Net Incr Gross Margin	$(\text{Incr Margin} / \text{Incr Sales}) * 100.$
Net Total Gross Margin	$(\text{Total margin} / \text{Total Sales}) * 100.$
Base Gross Margin	$(\text{Net Base Gross Margin} + \text{Aff Base Gross Margin}).$
Incr Gross Margin	$(\text{Net Incr Gross Margin} + \text{Aff Incr Gross Margin}).$
Total Gross Margin	$(\text{Net Total Gross Margin} + \text{Aff Total Gross Margin}).$
Budget	Budget for the vehicle.

Vehicle Design—Layout View—Single Page Metrics Page Mouseover

Single page metrics are available using layout view in the Vehicle Designer.

[Table A-10, "Vehicle Design—Layout View—Single Page Metrics Page Mouseover"](#) provides more detail.

Table A-10 Vehicle Design—Layout View—Single Page Metrics Page Mouseover

Metric	Definition
ROI	(Incremental Margin / (Promotion Budget / 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.
Margin Lift%	((Total Incremental Margin - Base Margin) / Base Margin) * 100.
Sales Lift%	((Total Incremental Sales - Base Sales) / Base Sales) * 100.
Base Sales	Sales (or predicted sales) generated by the focus item during the baseline period.
Incr Sales	Sum of Incremental Sales.
Tot Sales	Sum of Total Sales.
Base Margin	Sum of Base Margin.
Incr Margin	Sum of Incremental Margin.
Tot Margin	Sum of Total Margin.
Base Units	Sum of Base Units for all items.
Incr Units	Sum of Incremental Units for all items.
Tot Units	Sum of Total Units for all items.

Performance & What-If Metrics

Metrics are available from the Performance & What-If tab of the Offer Details window.

[Table A-11, "Performance & What-If Metrics"](#) provides more detail.

Table A-11 Performance & What-If Metrics

Metric	Definition
Forecast Status	The status of the forecast. See Forecast Statuses on page 5-45 for more information about the specific statuses.
Confidence	Level of confidence in the system generated forecast metrics. See Forecast Confidence Indicator on page 5-19.
SKUs Forecasted	The number of SKUs included in the forecast.
Value Index	A score of the promotion effectiveness of an offer based on the performance of ad items. It provides a weighted value that takes the incremental lift of revenue, profit, and units of the ad item into consideration. The weightings are configurable.
Aff Value Index	A score of the promotion effectiveness of an offer based on the performance of affinity items. It provides a weighted value that takes the incremental lift of revenue, profit, and units of the affinity items into consideration. The weightings are configurable.

Table A-11 (Cont.) Performance & What-If Metrics

Metric	Definition
Tot Value Index	A score of the overall promotion effectiveness of an offer based on the performance of ad items and affinity items. It is the sum of the Value Index and the Aff Value Index (minus the Value Index Offset).
ROI	$(\text{Incremental Margin} / (\text{Promotion Budget} / \text{total number of offers})) * 100$, where the number of offers is based on a configuration setting that determines whether to count unpositioned offers.
Lift%	$((\text{Total Units} - \text{Base Units}) / \text{Base Units}) * 100$.
Margin Lift%	$((\text{Total Incremental Margin} - \text{Base Margin}) / \text{Base Margin}) * 100$.
Sales Lift%	$((\text{Total Incremental Sales} - \text{Base Sales}) / \text{Base Sales}) * 100$.
Avg Cost	Average cost of the items contained within the offer.
Avg Ad Price	Average ad price of the items contained within the offer.
Base Units/Store	Average number of base units sold per store.
Incr Units/Store	$(\text{Total Units/Store}) - (\text{Base Units/Store})$.
Tot Units/Store	Average Total Units sold 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.
Base Sales	Sales (or predicted sales) generated by the focus item during the baseline period.
Incr Sales	Sum of Incremental Sales.
Tot Sales	Sum of Total Sales.
Base Margin	Sum of Base Margin.
Incr Margin	Sum of Incremental Margin.
Tot Margin	Sum of Total Margin.
Aff Base Units	Sum of Affinity Base Units.
Aff Incr Units	Sum of Affinity Incremental Units.
Aff Base Sales	Sum of Affinity Base Sales.
Aff Incr Sales	Sum of Affinity Incremental Sales.
Aff Tot Sales	Sum of Affinity Total Sales.
Aff Base Margin	Sum of Affinity Base Margin for all items.
Aff Incr Margin	Sum of Affinity Incremental Margin.
Aff Tot Margin	Sum of Affinity Total Margin.
Net Incr Units	Affinity Incremental Units + Incremental Units.
Net Incr Sales	Affinity Incremental Sales + Incremental Sales.
Net Incr Margin	Affinity Incremental Margin + Incremental Margin.
Aff Base Gross Margin	$(\text{Aff Base Margin} / \text{Aff Base Sales}) * 100$.
Aff Incr Gross Margin	$(\text{Aff Incr Margin} / \text{Aff Incr Sales}) * 100$.
Aff Total Gross Margin	$(\text{Aff Total Margin} / \text{Aff Total Sales}) * 100$.

Table A-11 (Cont.) Performance & What-If Metrics

Metric	Definition
Net Base Gross Margin	$(\text{Base Margin} / \text{Base Sales}) * 100.$
Net Incr Gross Margin	$(\text{Incr Margin} / \text{Incr Sales}) * 100.$
Net Total Gross Margin	$(\text{Total margin} / \text{Total Sales}) * 100.$
Base Gross Margin	$(\text{Net Base Gross Margin} + \text{Aff Base Gross Margin}).$
Incr Gross Margin	$(\text{Net Incr Gross Margin} + \text{Aff Incr Gross Margin}).$
Total Gross Margin	$(\text{Net Total Gross Margin} + \text{Aff Total Gross Margin}).$
Net Base Sales	$(\text{Base Sales} + \text{Aff Base Sales}).$
Net Base Margin	$(\text{Base Margin} + \text{Aff Base Margin}).$
Net Base Units	$(\text{Base Units} + \text{Aff Base Units}).$
Net Total Sales	$(\text{Total Sales} + \text{Aff Total Sales}).$
Net Total Margin	$(\text{Total Margin} + \text{Aff Total Margin}).$
Net Total Units	$(\text{Total Units} + \text{Aff Total Units}).$

Vehicle Design—Position Detail Window—Offers Tab—Individual Offer Performance

Individual Offer performance information is available from the Offers tab of the Position Details window. [Table A-12, "Vehicle Design—Position Detail Window—Offers Tab—Individual Offer Performance"](#) provides more detail.

Table A-12 Vehicle Design—Position Detail Window—Offers Tab—Individual Offer Performance

Metric	Definition
Value Index	A score of the promotion effectiveness of an offer based on the performance of ad items. It provides a weighted value that takes the incremental lift of revenue, profit, and units of the ad item into consideration. The weightings are configurable.
Aff Value Index	A score of the promotion effectiveness of an offer based on the performance of affinity items. It provides a weighted value that takes the incremental lift of revenue, profit, and units of the affinity items into consideration. The weightings are configurable.
Tot Value Index	A score of the overall promotion effectiveness of an offer based on the performance of ad items and affinity items. It is the sum of the Value Index and the Aff Value Index (minus the Value Index Offset).
ROI	$(\text{Incremental Margin} / (\text{Promotion Budget} / \text{total number of offers})) * 100$, where the number of offers is based on a configuration setting that determines whether to count unpositioned offers.
Lift%	$((\text{Total Units} - \text{Base Units}) / \text{Base Units}) * 100.$
Margin Lift%	$((\text{Total Incremental Margin} - \text{Base Margin}) / \text{Base Margin}) * 100.$
Sales Lift%	$((\text{Total Incremental Sales} - \text{Base Sales}) / \text{Base Sales}) * 100.$
Base Units/Store	Average number of base units sold per store.
Incr Units/Store	$(\text{Total Units/Store}) - (\text{Base Units/Store}).$

Table A-12 (Cont.) Vehicle Design—Position Detail Window—Offers Tab—Individual Offer Performance

Metric	Definition
Tot Units/Store	Average number of total units sold 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.
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 of 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 Tot 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.
Net Incr Units	Affinity Incremental Units + Incremental Units.
Net Incr Sales	Affinity Incremental Sales + Incremental Sales.
Net Incr Margin	Affinity Incremental Margin + Incremental Margin.
#SKUs	Number of SKUs in the offer.
Confidence	Level of confidence in the system generated forecast metrics. See Forecast Confidence Indicator on page 5-19.
SKUs Forecasted	The number of SKUs included in the forecast.
Offer	The name of the offer.
#Versions	The number of versions of the offer.
Deal Amount	The percentage or dollar amount of the deal.
Aff Base Gross Margin	$(\text{Aff Base Margin} / \text{Aff Base Sales}) * 100$.
Aff Incr Gross Margin	$(\text{Aff Incr Margin} / \text{Aff Incr Sales}) * 100$.
Aff Total Gross Margin	$(\text{Aff Total Margin} / \text{Aff Total Sales}) * 100$.
Net Base Gross Margin	$(\text{Base Margin} / \text{Base Sales}) * 100$.
Net Incr Gross Margin	$(\text{Incr Margin} / \text{Incr Sales}) * 100$.
Net Total Gross Margin	$(\text{Total margin} / \text{Total Sales}) * 100$.
Base Gross Margin	$(\text{Net Base Gross Margin} + \text{Aff Base Gross Margin})$.
Incr Gross Margin	$(\text{Net Incr Gross Margin} + \text{Aff Incr Gross Margin})$.

Table A-12 (Cont.) Vehicle Design—Position Detail Window—Offers Tab—Individual Offer Performance

Metric	Definition
Total Gross Margin	(Net Total Gross Margin + Aff Total Gross Margin).
Net Total Units	(Total Units + Aff Total Units).
Net Base Sales	(Base Sales + Aff Base Sales).
Net Base Margin	(Base Margin + Aff Base Margin).
Net Base Units	(Base Units + Aff Base Units).
Net Total Sales	(Total Sales + Aff Total Sales).
Net Total Margin	(Total Margin + Aff Total Margin).

Glossary

Affinity

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

Campaign

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

Cannibalization

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

Event

Activities relevant to the promotional calendar.

Forecast

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

Halo

The tendency for sales of complementary products that may rise because of the promotion.

Offer

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

Offer Versioning

Offer Versioning is the ability to define a set of locations or store subsets (as a subset of promotion versions) that an offer and its items (SKUs) will be featured in. This also includes the ability to override the discount, deal, price, and forecast per version.

Page Versioning

Page Versioning is the ability to define a set of locations or store subsets (as a subset of promotion versions) that a vehicle and its pages will be featured in. This also includes the ability to override the pages, positions (blocks), positioned categories (allocations), positioned offers (segments), and positioned offer attributes per version.

Promotion

Individual events or advertising you use to drive increased sales.

Promotion Calendar

The promotion events planned for a period of time.

Promotion Versioning

Promotion Versioning is the ability to define a set of locations or store subsets that a promotion will be featured in. This also includes the ability to override the store base per version.

Vehicle

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

Vehicle Versioning

Vehicle versioning is the ability to define multiple different vehicles in a promotion each with its own set of pages. Each vehicle may define a set of locations or stores subsets (as a subset of the promotion versions). This includes page versioning as each vehicle has its own set of pages.

What-if

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

Workflow

The customizable path taken in the design of a promotion.

Index

A

affinity
 affinity details, 5-42
 cannibalization, 5-42
 halo, 5-42

C

calendar, 2-1
 creating campaigns, 2-2
 creating events, 2-3
 creating promotions, 2-4
 removing items, 2-4
 toolbar and controls, 2-1
 views, 2-1
 filter by, 2-5
 graphical, 2-2
 list, 2-2
campaigns, 4-1
 creating from the calendar, 4-1
 creating from the Navigator, 4-2
cannibalization, 5-42
categories
 about, 5-15
 adding to a promotion, 5-15
 deleting from a promotion, 5-16

E

events, 4-2
 creating from the calendar, 4-3
 creating from the navigator, 4-4
export, 5-52

F

forecasting, 5-43

G

graph, 5-46
 printing, 5-48
 viewing, 5-47

H

halo, 5-42
hierarchies selector
 location hierarchy, 2-11
 merchandise hierarchy, 2-12
 like items, 2-14
 managing merchandise, 2-13
SKU lists, 2-12
store sets, 2-11

L

like items, 2-14
log on, 1-2

M

media details, 5-49
milestones
 adding, 7-3
 completing, 7-6
 removing, 7-4

N

navigator, 2-5
 accessing the calendar, 2-5
 documents, 2-6
 reports, 2-10
 setup
 page templates, 2-10
 promotion templates, 2-10
 vehicle templates, 2-10
 to do, 2-6
notes
 creating for offers, 5-51

O

offers, 5-17
 about, 5-17
 adding, 5-22
 BOGO offers, 5-24
 approving, 5-33
 deleting, 5-27
 editing, 5-26

- forecast confidence indicator, 5-19
- media details, 5-49
- notes, 5-51
 - adding, 5-51
 - adding to an existing, 5-51
- offer details window, 5-20
- offer status
 - about, 5-30
 - offer status window, 5-31
- performance & what-if, 5-35
- positioning in the vehicle design tab, 6-17
- rejecting, 5-34
- submitting, 5-32
 - required criteria, 5-32
- versions, 5-27
 - including or excluding, 5-28
 - modifying, 5-29
 - viewing, 5-27

Oracle Retail Promotion Planning and Optimization

- about, 1-1
- features, 1-1
- general tasks, 1-2
- logging on, 1-2
- users, 1-2

P

- page templates
- positions
 - adding, 3-4
 - creating copies, 3-4
 - manually setting dimension and position, 3-4
 - removing, 3-4
 - using drag and drop to set dimension and position, 3-4
- performance & what-if
 - affinity, 5-42
 - viewing affinity details, 5-43
 - forecasting, 5-43
 - graph, 5-46
 - user forecast
 - creating, 5-40
 - removing, 5-41
 - viewing, 5-36
- phases
 - completing, 7-6
 - editing phase details, 7-5
- promotion performance
 - from vertical tab, 2-15
- promotion templates
 - creating, 3-13
 - viewing, 3-12
 - workflow, 3-16
- promotions, 5-1
 - about, 5-1
 - creating
 - associating with a campaign, 5-2
 - from the calendar, 5-1
 - from the navigator, 5-3
 - creating from the calendar, 2-4

- exporting, 5-52
- opening, 5-3
- promotions manager, 5-5
 - categories tab, 5-15
 - offers, 5-17
 - summary tab, 5-5
 - vehicle design tab, 6-1
 - vendor deals, 5-12
 - workflow
 - about, 7-1

S

- SKU, 2-12
- Store, 2-11

T

- target allocation, 2-15
- tasks
 - approving, 2-7, 7-7
 - assigning, 3-18, 7-3
 - beginning, 7-4
 - completing, 2-10, 7-6
 - denying, 2-8, 7-7
 - removing, 7-4
 - starting an assigned task, 2-9
 - viewing approvals, 2-7
 - working on, 2-8
- templates
 - page templates, 3-1
 - creating, 3-2
 - deactivating, 3-5
 - viewing, 3-1
 - promotion templates, 3-12
 - vehicle templates, 3-5

U

- user forecasts
 - creating, 5-40

V

- vehicle design
 - design legend, 6-3
 - editing page layout using layout view, 6-11
 - editing page layout using list view, 6-12
 - informational popups, 6-4
 - list view, 6-2
 - positions, 6-5
 - details, 6-5
 - managing, 6-10
 - managing content, 6-15
 - thumbnail view, 6-3
 - understanding the vehicle design window, 6-1
- vehicle pages
 - adding, 6-9
 - deleting, 6-9
 - editing a page template, 6-10
 - managing, 6-8

- reordering, 6-9
- viewing, 6-8
- vehicle templates
 - adding pages, 3-10
 - creating, 3-6
 - modifying, 3-11
 - changing page template assignment, 3-11
 - moving a page in list or layout view, 3-11
 - removing pages, 3-11
 - viewing, 3-6
- vendor deals, 5-12
 - adding, 5-12
 - deleting, 5-15
- versions
 - adding store sets, 5-8
 - offers, 5-27
 - overriding store counts for store sets, 5-9
- vertical tab, 2-11
 - hierarchies selector, 2-11
 - promotion performance, 2-15
 - target allocation, 2-15

W

- what-if, 5-38
- workflow
 - about, 7-1
 - milestones, 3-19
 - adding, 3-19, 7-3
 - completing, 7-6
 - modifying, 3-19
 - removing, 3-20, 7-4
 - phases, 3-16
 - changing phase names, 3-16
 - completing, 7-6
 - editing phase details, 7-5
 - starting, 7-4
 - promotion templates, 3-16
- tasks, 3-17
 - adding, 3-17, 7-1
 - approving, 7-7
 - assigning, 3-18, 7-3
 - beginning, 7-4
 - completing, 7-6
 - denying, 7-7
 - modifying, 3-18
 - removing, 3-19, 7-4
 - starting, 7-4

