IBM Assortment Optimization

Users' Guide

IBM

Contents

Chapter 1. Assortment Optimization Overview

IBM® Omni-Channel Merchandising Assortment Optimization uses science and analytics to deliver an insight-powered platform for item evaluation, which allows you to make informed, consumer-centric assortment decisions

Achieving the right balance of choice and range within the constraints of available space while avoiding rising supply chain costs is key to delivering sales performance. Assortment Optimization uses IBM Omni-Channel Merchandising science and analytics to deliver an insight-powered platform for item evaluation, which allows you to make informed, consumer-centric assortment decisions.

Once IBM Omni-Channel Merchandising has modeled your company's data, you can define strategies and rules, optimize "what-if" scenarios and execute the best scenario. When creating scenarios, you weight specific financial objectives, define the relative importance of individual shopper segments, and set goals for distinct segments. The optimization process protects key items by shopper segment, protects private label products, deletes discontinued or underperforming items and optimizes scenarios for SKU count and space constraints. Assortment Optimization provides reports for easy scenario comparison, allowing you to select the most effective. Using this application, it's also simple to create presentations for category manager review. During the execution phase, you can export a modified planogram to third party space planning software.

New features in IBM Assortment Optimization 16.2

IBM Assortment Optimization 16.2 introduces several new features.

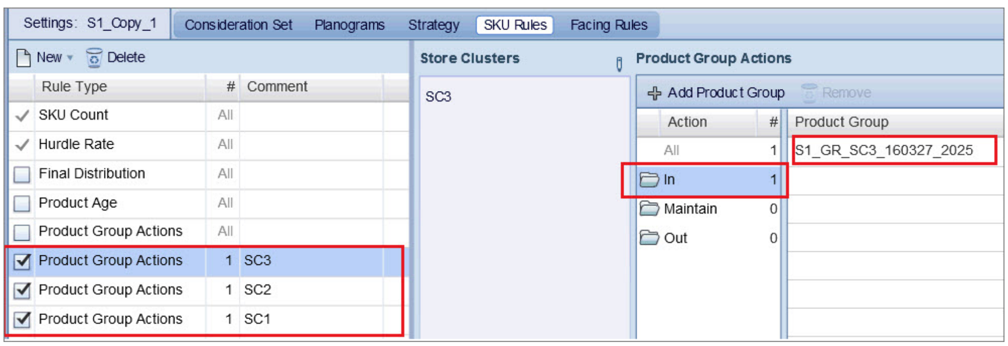
Override Repeated UPCs with Different Types

Prior to 16.2, if a Stocked product was Retained by Optimization and had No Override actions, and you created a new product with the same UPC number, duplicated the scenario, ran SKUs, then optimized, two products with same UPC number would appear under **Results>Detailed Results>Products**. As of 16.2, if the same thing happened, New product or Market product will be "Ignored by User" on Opt Action and "delete" on Override Action.

Generating PGs and PG action rules when duplicating an optimized scenario

Under the Scenarios tab of an optimized scenario, when you Duplicate it (with or without results), the Duplicate Scenario window now has a check box for zone selection.

A related PG action rule regarding the zones is created.



Related PGs are generated and tied to the **Product Group Actions** rule **In**.

Note: This feature is controlled via a system setting. Please contact your system administrator for more details.

Additional enhancements

The 16.2 release includes the following additional enhancement:

- As of 16.2, under **Settings>Consideration Set>New Products**, the **New Products to Consider** ACV bar has been renamed to **Threshold for borrowing ACV to new products**. Its behavior is the same; it allows you to ensure that the ACV is not too small when borrowing ACV from Stocked Products for New Products. You can set the ACV by using the slider bar or manually typing a value in the adjacent form field.

Translations

IBM Assortment Optimization is available in multiple national language versions.

The Assortment Optimization application interface is available in the following national languages:

- Spanish
- Italian

IBM Omni-Channel Merchandising software services multi-currency and supports international currencies in the localized versions.

System Requirements

Provides System Requirements for IBM Omni-Channel Merchandising applications, including Assortment Optimization

The following details standard system requirements for using the IBM Omni-Channel Merchandising services.

Note: These resource requirements apply to the IBM Omni-Channel Merchandising services only. Running other applications simultaneously may negatively affect system performance. You may need to refer to their requirements and make additional adjustments on your computer.

The browsers listed below are certified and supported for Microsoft Windows operating systems only.

	Minimum	**Recommended**	**Not Supported**
RAM	1 GB	1.5 GB	< 1 GB
CPU	1 GHz	2 GHz	< 900 MHz
Free Disk Space	50 MB	100 MB	< 50 MB
OS	Windows XPWindows	Windows 7	Non-Windows, Windows 2000, Windows 95/ME, Windows Vista, Windows 8
Browser*	Internet Explorer 11 The browser must have support of 128 bit encryption enabled.	Internet Explorer 11 The browser must have support of 128 bit encryption enabled.	Netscape, Internet Explorer 11 in Enterprise Mode, Internet Explorer 9 or lower, Firefox, Opera, Safari
Export Applications	Adobe Acrobat Reader 7 MS Office 2002 (XP) (Excel *.xls* file format)	Adobe Acrobat Reader 7 or higher MS Office 2003 or higher (Excel *.xls* or *.xlsx* file format)	_
Adobe Flash	Adobe Flash 10.3.181	Adobe Flash 11 or higher	Adobe Flash 9, 10
Screen Resolution	1024 x 768	1024 x 768	> 1900 x 1200
Connection	T1	T1	Dial-up, less than T1
Mouse	Two-button	Three-button with scroll feature	_

Data Requirements

Details the kinds of data your company must provide to IBM Omni-Channel Merchandising to use Assortment Optimization

To use Assortment Optimization, your company must provide the following types of data.

- Products
- Stores
- Current® Prices
- Current Costs
- T-LOG (transaction log)
- Planograms

Note: Planogram data is only required for facings optimizations. You can perform SKU optimizations without this data.

- Market Data

Note: Market Data is optional, depending on your use case and the availability of syndicated data.

Navigation

Describes the basic navigation structure of Assortment Optimization. Many pages in Assortment Optimization follow the same basic navigation structure.

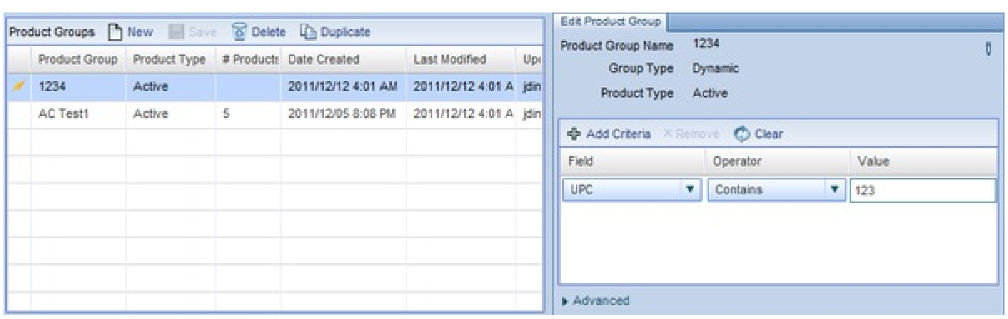
About this task

Many pages in Assortment Optimization follow the same basic navigation structure. Often, pages contain multiple panels. Action buttons related to the items in the panel are located in the panel's header.

Summary and Detail Panels

Some Assortment Optimization pages contain a summary grid and detail panels. Selecting an item in the summary grid opens details related to that item in the detail panels. Those panels may provide editing options or just display information.

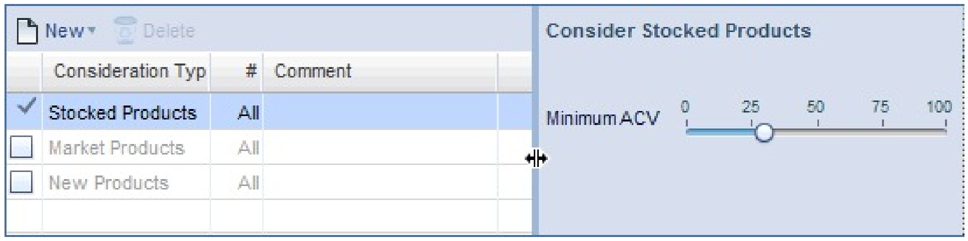
For example, by clicking a row in the **Product Groups** grid, you open the selected group in the **Edit Product Group** panel on the right.



Resizing Panels

When a page has multiple panels, you can often resize the panels horizontally or vertically. To resize a panel:

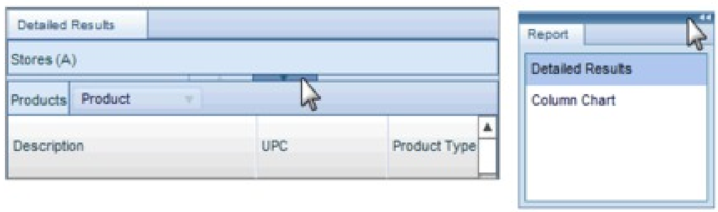
1. Hover your cursor in the area between the panels. The **Resize** cursor appears.



2. Click and drag the cursor to the new location.

Using Collapsible Panels

Assortment Optimization allows you to collapse some panels to provide more space on the screen for other panels. Click the arrow icons to collapse or expand a panel.



Action Buttons

Action buttons are generally located in the header area of a grid or panel. For example, in the header of the **Scenarios** page, you can find buttons to create a new scenario (**New**), copy an existing scenario (**Duplicate**), remove a scenario (**Delete**), run an optimization (**Optimize**) or export a scenario's optimization results (**Export**).

Some action buttons do not display a descriptive name with the icon. Hover your cursor over these icons to view their descriptions.

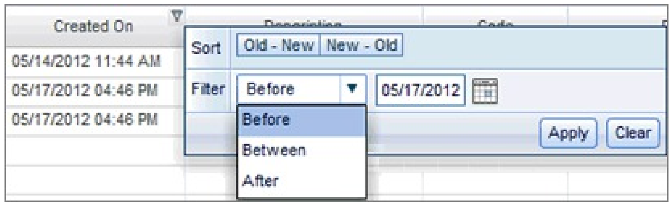
Filtering Grids

Filtering a grid allows you to hide information and focus on the rows that are relevant to your task.

Note: Filtering is only available in the **Detailed Results** report.

To filter on a specific column:

1. Click the filter icon in the column heading.



2. Select an operator and enter a search value. The available operators reflect the type of column you selected (text, number or date).
3. Click **Apply**.

Sorting Grids

To sort grids by the values in a specific column, click the column header. The first time you click, the grid sorts in ascending order. To sort in descending order, click the column header again. An arrow icon appears in the column header to indicate the sort order.

Note: When you sort a grid in the **Detailed Results** report, the application sorts all rows, including those not shown on the page. In all other grids, the application only sorts the visible rows.

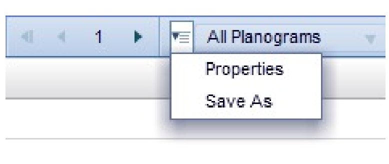
Editing and Customizing Grids

To specify a column's order, you can drag and drop columns. You can also create Saved Views, which will store your settings for column order, column visibility, sort orders, and filters. This functionality is available on the following grids:

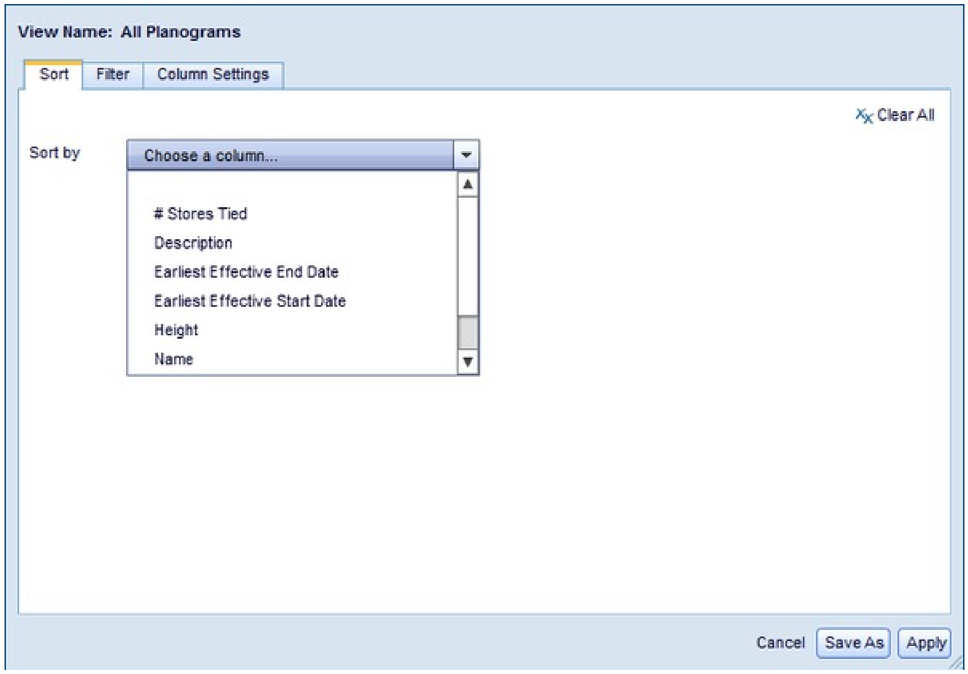
- Projects
- Store Cluster Groups
- Planograms
- Markets
- New Products
- Product Groups

To add a view:

1. In the Actions Buttons header, click on the sorting icon to the left of the Views drop-down menu.



2. Select Properties from the drop-down menu.
3. Navigate through the Sort, Filter, and Column Settings tabs and their respective drop-down menus to customize your view.



4. When you are finished, click Apply. The changes will apply to the default view of the grid you are on.
5. If you want to keep the default view and make a new custom view, you need to save it. To save the view, click Save As.
6. Enter a name for your view in the View Name text box at the top of the pop-up. Click Apply & Save.

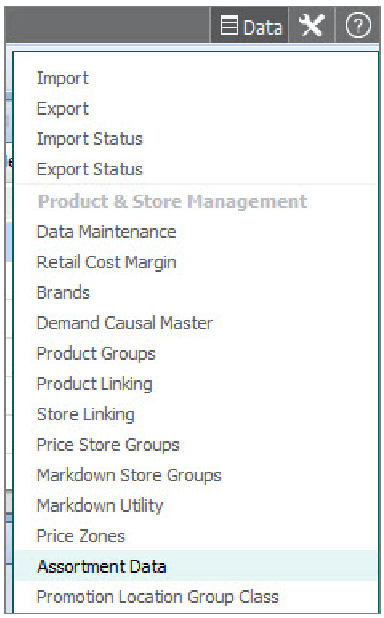
Searching

Certain areas of the application include the option to perform searches. Enter your query in the blank form field and click the magnifying glass icon to search. To use wildcards in your search, enter the % sign after your query.

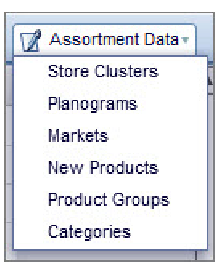
Chapter 2. Assortment Data

Use the data maintenance pages to manage or view the six types of data used in Assortment Optimization: Store Clusers, Planograms, Markets, New Products, Product Groups, and Categories.

To access the Assortment Data page, click the **Data** drop-down menu and select **Assortment Data**.



In addition, you can access each Assortment data maintenance area for individual Projects on the **Project Details** page or the **Projects** page using the **Assortment Data** drop-down menu:



Assortment Data in Data Maintenance contains six areas:

- "Store Clusters" on page 10: Manages mutually-exclusive groupings within a division
- "Planograms" on page 13: Displays planogram and store-tie data loaded via OpenLink
- "Markets" on page 22: Manages syndicated market data imported by users
- "New Products" on page 27: Manages new products created by users

- “Product Groups” on page 15: Manages static and dynamic criteria-based product groupings
- “Categories” on page 33: Displays segments and sub-segments for a particular category and their member products.

You can access each of these areas using buttons in the blue navigation bar. Division and/or category drop-down lists appear on this bar. Use these drop-downs to filter information shown on the page.

Also see these sections for information about the IBM Omni-Channel Merchandising platform:
- Chapter 5, “Managing product data,” on page 97
- “Importing data” on page 137
- “Exporting data” on page 181

Related Topics

“Store Clusters”

“Planograms” on page 13

“Markets” on page 22

“New Products” on page 27

“Product Groups” on page 15

Store Clusters

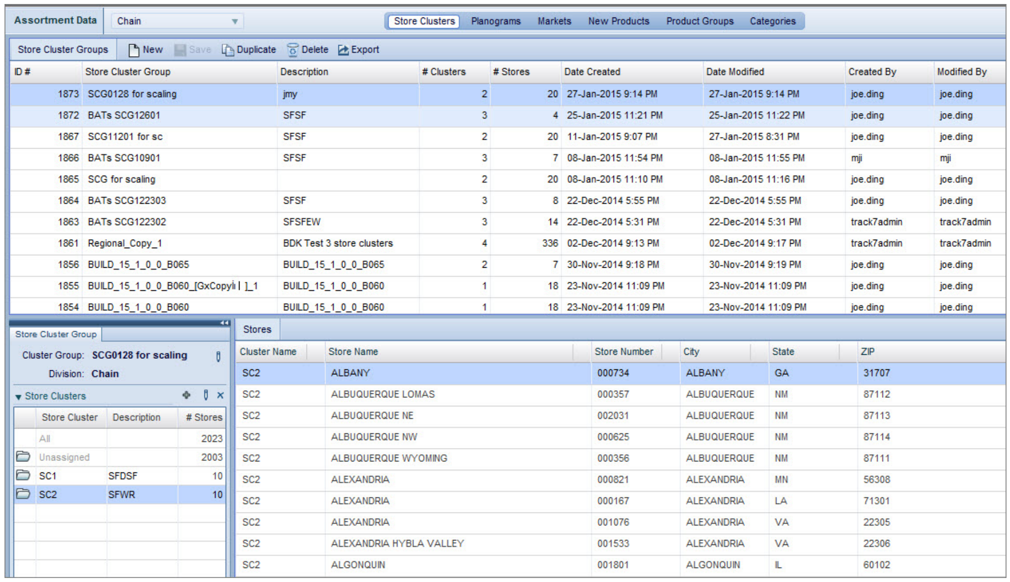
Store clusters are the lowest level at which users may modify rules and the lowest level at which the optimized assortment may vary.

From the **Store Clusters** area, you can assign stores to individual store clusters within a store cluster group. A single store may only belong to one store cluster within a group.

Assortment Optimization can use a store cluster group to define the scope of an optimization. In this usage, store clusters are the lowest level at which users may modify rules and the lowest level at which the optimized assortment may vary.

Store Clusters Page

Describes the Store Clusters page, which displays information on Store Cluster Groups and Stores



- **Store Cluster Groups** grid: Displays all store cluster groups. You can use the menu bar above the grid to create, delete or duplicate a store cluster group. The **Save** button in this bar applies changes you make to the selected store cluster group.

Sort this grid by clicking on the column headers. If there are more store cluster groups than Assortment Optimization can display on a single page, the sort only applies to the current page's rows. You can use the arrow buttons to view the other pages.

- **Store Cluster Group** panel: Allows editing for the selected store cluster group. In this panel, you can create/delete store clusters, assign stores to clusters and select valid categories for the store cluster group.
- **Stores** grid: Displays stores assigned to the selected store cluster. To assign stores to clusters, select **All** or **Unassigned** in the summary panel. Then, select and drag stores from the **Stores** grid to a store cluster.

Creating Store Cluster Groups

Use this procedure to create a new store cluster group. Assortment Optimization can use a store cluster group to define the scope of an optimization.

About this task

To create a new store cluster group:

Procedure

1. Click **New** from the action buttons above the store cluster group grid.
2. In the dialog box, enter a **Cluster Group Name** and select a **Division**. Click **OK**. The new store cluster group appears in the grid.
3. See "Editing Store Cluster Groups" on page 12 for information on adding store clusters, assigning stores and selecting categories.

   Related Topics

   "Editing Store Cluster Groups" on page 12

Editing Store Cluster Groups

Use this procedure to edit Store Cluster Groups

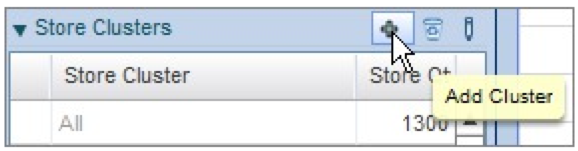
About this task

Some editing options are not available for store cluster groups that were created using OpenLink. For these store cluster groups, you cannot modify the store mappings or store clusters, but you change the selected categories. For store cluster groups created directly in the **Store Clusters** page, all editing options are available.

To edit store clusters, assign stores to the group:

Procedure

1. Click on the store cluster group in the grid.
2. In the **Store Clusters** area, use the **Add Cluster** icon to create as many store clusters as needed. To delete a store cluster, select it and click the **Delete Cluster** icon.



3. To add stores, click **All** in the store cluster list. Select and drag stores from the **Stores** grid to the appropriate store cluster.
4. Click **Save** to apply your changes to the selected store cluster group. If you open another store cluster group or leave the **Store Cluster** page before saving, your changes are lost.

Exporting Store Cluster Groups

Use this procedure to export Store Cluster Groups

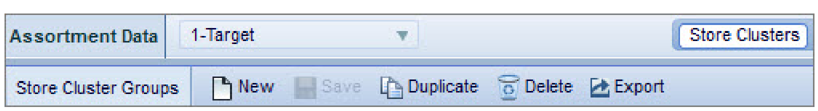
About this task

You can export Store Cluster Groups for offline viewing in CSV or Excel format.

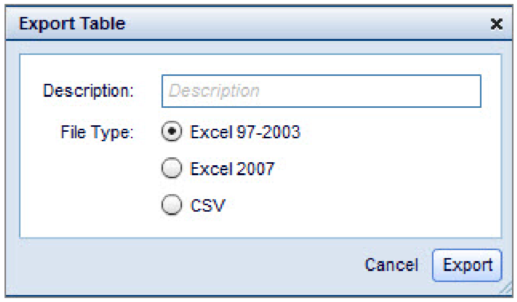
To export Store Cluster Groups:

Procedure

1. In the **Assortment Data** area, click on the **Store Clusters** tab. Select a Store Cluster Group in the **Store Cluster Groups** grid.
2. In the heading at the top of the grid, click the **Export** icon.



3. The **Export Table** pop-up window opens. Enter a description in the field form. This will become your file name.



4. Select the**File Type** you would like the export file to be saved as.
5. Click **Export**.

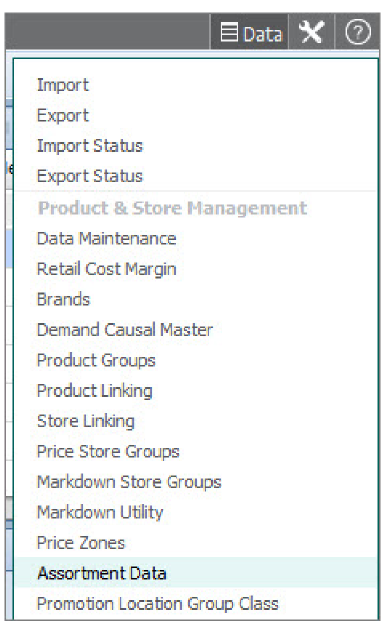
Planograms

Assortment Optimization uses planograms for information about the number of available facings per product, the merchandisable space dimensions and product dimensions. Planograms are required in order to optimize facings.

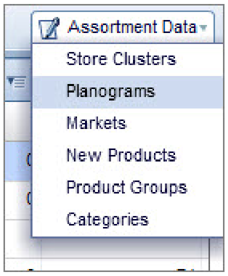
Assortment Optimization uses planograms for information about the number of available facings per product, the merchandisable space dimensions and product dimensions. Planograms are required in order to optimize facings. You can also use a loaded planogram to set the scope of an optimization. In this usage, the application optimizes the assortment for the selected planogram in all stores where it is used.

Each planogram is assigned to at least one division, category and must have a valid effective date to be eligible for inclusion in optimization. If a planogram does not have at least one product that can be assigned to a particular modeling category, it will be assigned to a category called **No Category**.

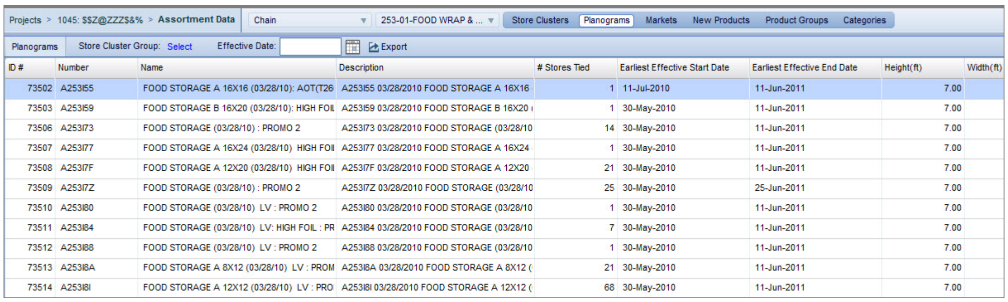
The read-only **Planograms** area displays all loaded planogram data. To access it, select **Assortment Data** from the **Data** menu.



Additionally, you can access it by navigating to the **Assortment Data** drop-down menu from the **Project Details** page and selecting **Planograms**.

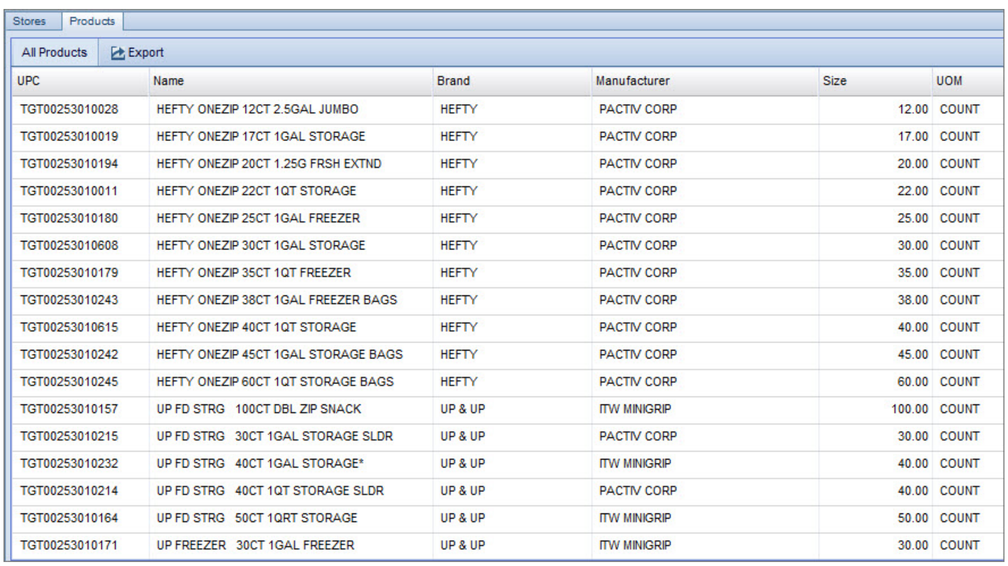


The **Planograms** area will open.



ID #	Number	Name	Description	# Stores Tied	Earliest Effective Start Date	Earliest Effective End Date	Height(ft)	Width(ft)
73502	A253I55	FOOD STORAGE A 16X16 (03/28/10): AOT(T26	A253I55 03/28/2010 FOOD STORAGE A 16X16	1	11-Jul-2010	11-Jun-2011	7.00	
73503	A253I59	FOOD STORAGE B 16X20 (03/28/10): HIGH FOIL	A253I59 03/28/2010 FOOD STORAGE B 16X20	1	30-May-2010	11-Jun-2011	7.00	
73506	A253I73	FOOD STORAGE (03/28/10) : PROMO 2	A253I73 03/28/2010 FOOD STORAGE (03/28/10	14	30-May-2010	11-Jun-2011	7.00	
73507	A253I77	FOOD STORAGE A 16X24 (03/28/10) HIGH FOI	A253I77 03/28/2010 FOOD STORAGE A 16X24	1	30-May-2010	11-Jun-2011	7.00	
73508	A253I7F	FOOD STORAGE A 12X20 (03/28/10) HIGH FOI	A253I7F 03/28/2010 FOOD STORAGE A 12X20	21	30-May-2010	11-Jun-2011	7.00	
73509	A253I7Z	FOOD STORAGE (03/28/10) : PROMO 2	A253I7Z 03/28/2010 FOOD STORAGE (03/28/10	25	30-May-2010	25-Jun-2011	7.00	
73510	A253I80	FOOD STORAGE (03/28/10) LV : PROMO 2	A253I80 03/28/2010 FOOD STORAGE (03/28/10	1	30-May-2010	11-Jun-2011	7.00	
73511	A253I84	FOOD STORAGE (03/28/10) LV: HIGH FOIL : PR	A253I84 03/28/2010 FOOD STORAGE (03/28/10	7	30-May-2010	11-Jun-2011	7.00	
73512	A253I88	FOOD STORAGE (03/28/10) LV : PROMO 2	A253I88 03/28/2010 FOOD STORAGE (03/28/10	1	30-May-2010	11-Jun-2011	7.00	
73513	A253I8A	FOOD STORAGE A 8X12 (03/28/10) LV : PROM	A253I8A 03/28/2010 FOOD STORAGE A 8X12 (	21	30-May-2010	11-Jun-2011	7.00	
73514	A253I8I	FOOD STORAGE A 12X12 (03/28/10) LV : PRO	A253I8I 03/28/2010 FOOD STORAGE A 12X12 (	68	30-May-2010	11-Jun-2011	7.00	

Beneath the **Planograms** grid are read-only **Stores** and **Products** tabs.



UPC	Name	Brand	Manufacturer	Size	UOM
TGT00253010028	HEFTY ONEZIP 12CT 2.5GAL JUMBO	HEFTY	PACTIV CORP	12.00	COUNT
TGT00253010019	HEFTY ONEZIP 17CT 1GAL STORAGE	HEFTY	PACTIV CORP	17.00	COUNT
TGT00253010194	HEFTY ONEZIP 20CT 1.25G FRSH EXTND	HEFTY	PACTIV CORP	20.00	COUNT
TGT00253010011	HEFTY ONEZIP 22CT 1QT STORAGE	HEFTY	PACTIV CORP	22.00	COUNT
TGT00253010180	HEFTY ONEZIP 25CT 1GAL FREEZER	HEFTY	PACTIV CORP	25.00	COUNT
TGT00253010608	HEFTY ONEZIP 30CT 1GAL STORAGE	HEFTY	PACTIV CORP	30.00	COUNT
TGT00253010179	HEFTY ONEZIP 35CT 1QT FREEZER	HEFTY	PACTIV CORP	35.00	COUNT
TGT00253010243	HEFTY ONEZIP 38CT 1GAL FREEZER BAGS	HEFTY	PACTIV CORP	38.00	COUNT
TGT00253010615	HEFTY ONEZIP 40CT 1QT STORAGE	HEFTY	PACTIV CORP	40.00	COUNT
TGT00253010242	HEFTY ONEZIP 45CT 1GAL STORAGE BAGS	HEFTY	PACTIV CORP	45.00	COUNT
TGT00253010245	HEFTY ONEZIP 60CT 1QT STORAGE BAGS	HEFTY	PACTIV CORP	60.00	COUNT
TGT00253010157	UP FD STRG 100CT DBL ZIP SNACK	UP & UP	ITW MINIGRIP	100.00	COUNT
TGT00253010215	UP FD STRG 30CT 1GAL STORAGE SLDR	UP & UP	PACTIV CORP	30.00	COUNT
TGT00253010232	UP FD STRG 40CT 1GAL STORAGE*	UP & UP	ITW MINIGRIP	40.00	COUNT
TGT00253010214	UP FD STRG 40CT 1QT STORAGE SLDR	UP & UP	PACTIV CORP	40.00	COUNT
TGT00253010164	UP FD STRG 50CT 1QRT STORAGE	UP & UP	ITW MINIGRIP	50.00	COUNT
TGT00253010171	UP FREEZER 30CT 1GAL FREEZER	UP & UP	ITW MINIGRIP	30.00	COUNT

When you select a particular planogram, the **Stores** tab will load the stores that the planogram is tied to. Similarly, if you navigate to the **Products** tab, it will display the products associated with the selected planogram.

Note: The **Stores** and **Products** tabs are read-only.
You can filter the list of Planograms based on effective date. If the **Effective Date** field is blank, then all planograms will be displayed.

You can make changes to Planograms only by importing new data through OpenLink.

Note: You can optimize multiple planograms for a category when you use store cluster groups to set the optimization scope.

Exporting Planograms

Use this procedure to export Planograms

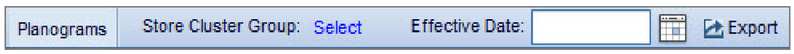
About this task

You can export Planograms for offline viewing in CSV or Excel format.

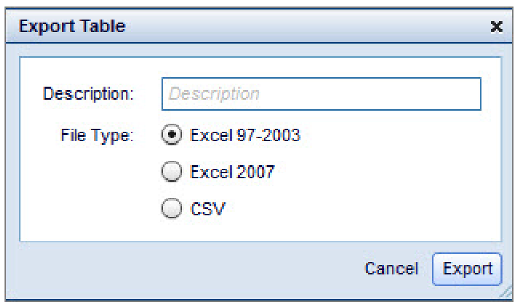
To export Planograms:

Procedure

1. In the **Assortment Data** area, click on the **Planograms** tab. Select a Planogram in the grid.
2. In the heading at the top of the grid, click the **Export** icon.



3. The **Export Table** pop-up window opens. Enter a description in the field form. This will become your file name.



4. Select the**File Type** you would like the export file to be saved as.
5. Click **Export**.

Product Groups

In Assortment Optimization, you can use product groups to enforce specific actions, such as protect, delete, add and ignore.

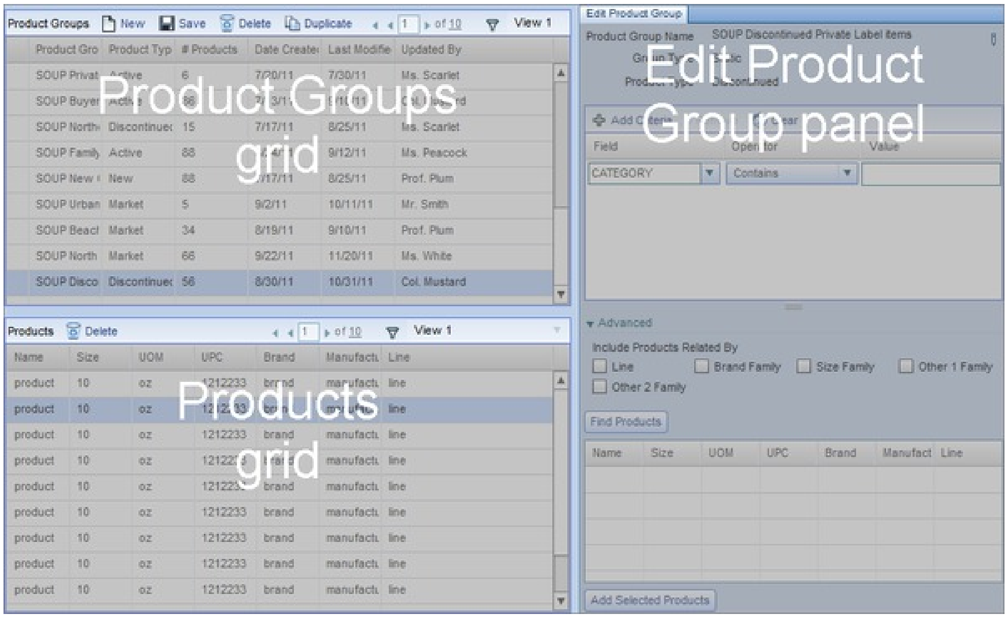
In Assortment Optimization, you can use product groups to enforce specific actions, such as protect, delete, add and ignore for products. See “Rules” on page 50 for details.

Product groups belong to a single category. These groups can include any combination of products. Often, these groups are made up of products within a brand or best-selling products. Although product groups in Assortment Optimization are separate from product groups in other IBM Omni-Channel Merchandising applications, they work similarly.

You can create two types of product groups: static and dynamic. Both types select products by applying a set of criteria. However, for dynamic product groups, Assortment Optimization automatically adds new products fitting the criteria to the group. To add new products to a static group, you can either search for the products and add them manually, or import your own Product Groups via Excel files.

Product Groups Page

The Product Groups page displays Products and Product Groups, and allows you to edit selected Product Groups. This means you can modify the product criteria for dynamic groups or search and add new products for static groups.



- **Product Groups** grid: Displays all groups. You can use the menu bar above the grid to create, delete or duplicate a product group. The **Save** button in this bar applies changes you make to the selected product group. Dynamic groups are indicated by a lightning bolt icon.
- **Edit Product Group** panel: Allows you to edit the selected product group. In this panel, you can modify the product criteria for dynamic groups or search and add new products for static groups.
- **Products** grid: Displays products attached to the selected product group. You can use the **Delete** button to remove products from static groups.

Creating Product Groups

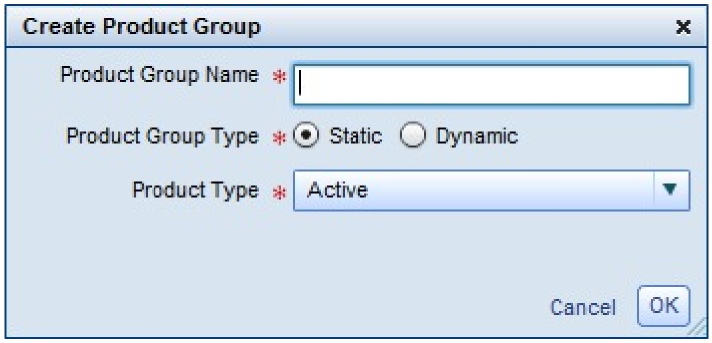
Use this procedure to create a new static or dynamic product group

About this task

To create a new static or dynamic product group:

Procedure

1. Click **New** in the menu bar above the **Product Groups** grid.



2. Enter a **Product Group Name**.
3. Select **Static** or **Dynamic**. In the **Product Groups** grid, dynamic groups are indicated by a lightning bolt icon.
4. Choose the type of products included in the group (**Active**, **Discontinued**, **New Market**, or **All**). For details on product types, see "Product Types in Assortment Data" on page 35.
5. Click **OK**. The new group appears in the grid.

Related Topics

"Product Types in Assortment Data" on page 35

Adding Products to Static Product Groups

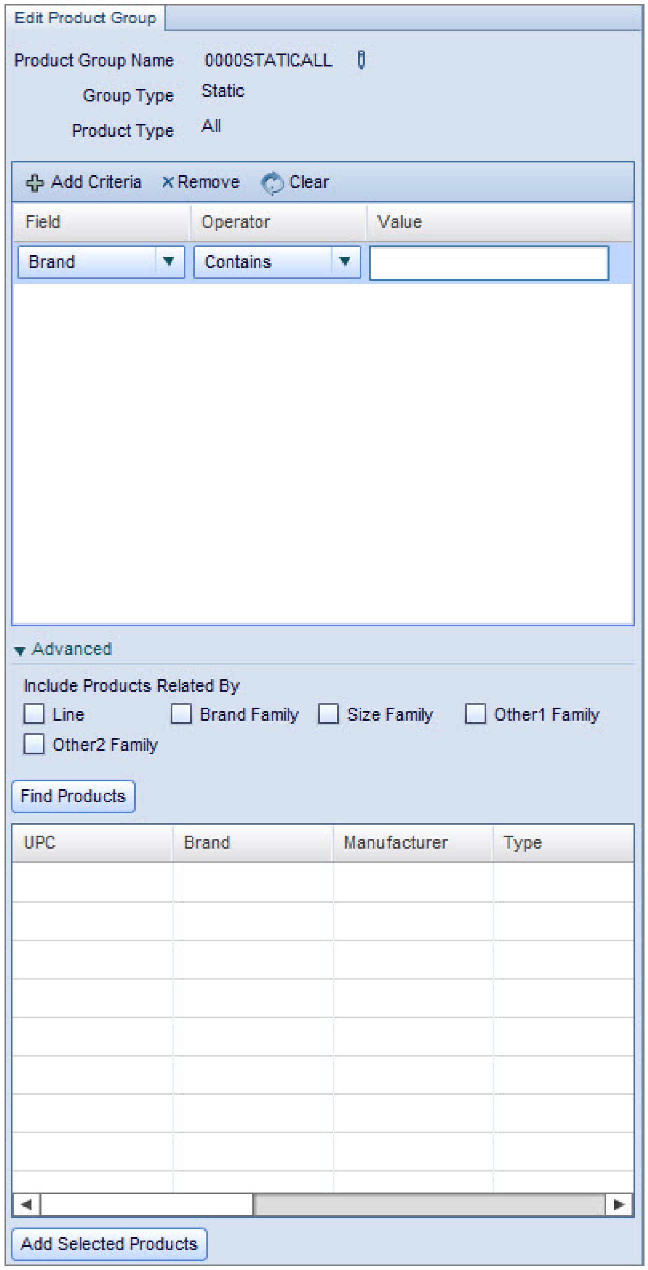
Use this procedure to add products to a static product group

About this task

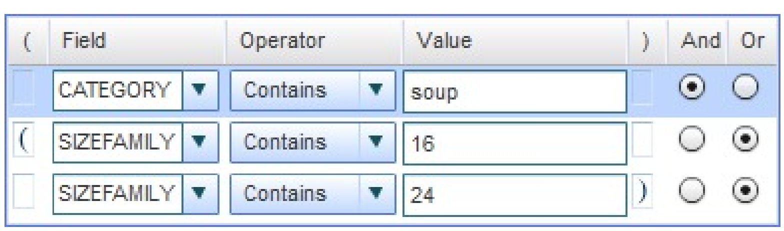
To add products to a static product group:

Procedure

1. Select the group from the **Product Groups** grid.
2. Use the **Edit Product Group** panel to add search criteria. Select a **Field** and **Operator**. Enter a search **Value**.



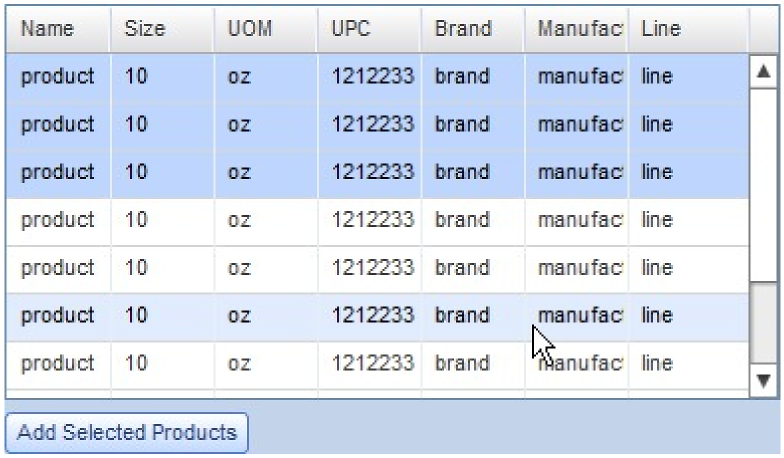
3. To add additional criteria, click **Add Criteria**. Open/close parentheses checkboxes and **And**/ **Or** radio buttons appear for each row. Use these to determine how multiple criteria are applied. In the example below, the **Category** field must contain "soup" and the **Size Family** field must contain either "16" or "24".



Note: The **And**/**Or** radio buttons which appear in the last row have no effect.

4. In the **Advanced** panel, use the checkboxes to automatically include products which belong to the same line, brand family, size family, or Other1/2 family as products which meet the criteria.

   For example, in the Canned Soup category, Tomato 16OZ fits the category, but Chicken Noodle 18.8OZ does not. If these products belonged to the same brand family and you set the **Brand Family** checkbox, the application would return both products in the search results.
5. Click **Find Products**. The grid in the **Edit Product Group** panel updates with products that match your criteria.

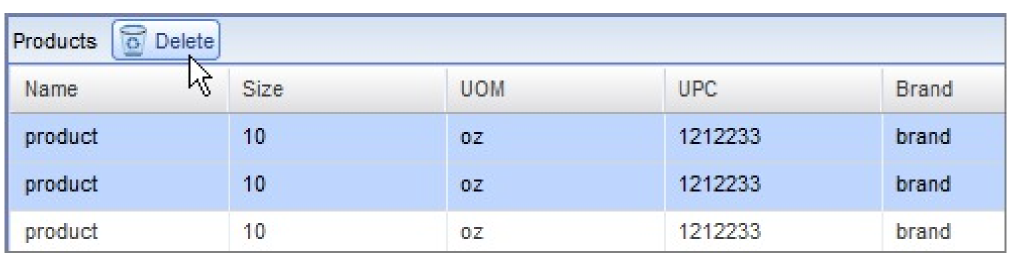


6. Click to select products from the grid. Hold down the **Shift** key to select sequentially or the **Ctrl** key to select non-sequentially. Click **Add Selected Products**.
7. Click **Save** to apply your changes to the selected product group. If you open another group or leave the **Product Groups** page before saving, your changes are lost.

Removing Products from Static Product Groups

Use this procedure to remove products from static product groups

When you select a group from the **Product Groups** grid, the **Products** grid show all attached products. To remove a product, select it and click **Delete** in the **Products** panel. Click **Save** to apply your change.



Importing Product Groups

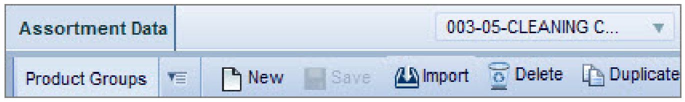
Use this procedure to import product groups

About this task

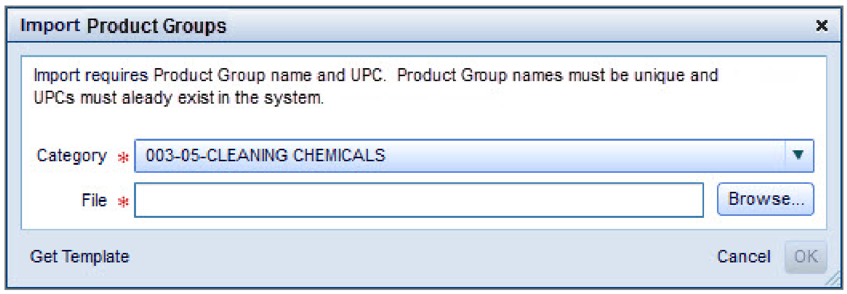
To import your own pre-defined product groups to the application:

Procedure

1. Click **Import** from the **Product Groups** grid.



2. The **Import Product Groups** pop-up window will open. Select a **Category** from the drop-down menu. Then click **Browse** to browse the location of saved files and select your file to upload to the system. The file can be Excel or CSV format.



3. If you click **Get Template**, you will download the Excel file that lists the column names and order required for import.
4. Click **OK** to import the Product Group file.

   Note:

   If you import a PG-UPC pair, all products and all types (**Active**, **Discontinued**, **Market**, **New Products**) with this UPC will be tied to the Product Group.

Exporting Product Groups

Use this procedure to export Product Groups

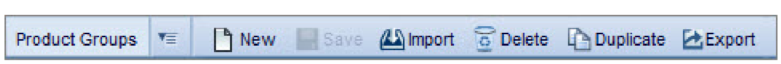
About this task

You can export Product Groups and Products from the **Product Groups** tab for offline viewing in CSV or Excel format.

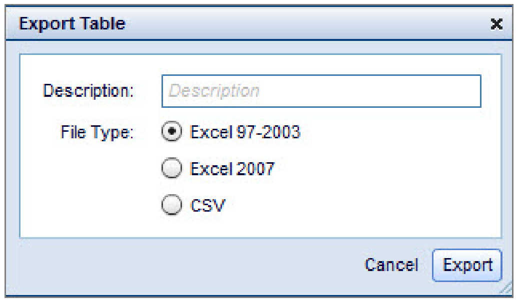
To export Product Groups:

Procedure

1. In the **Assortment Data** area, click on the **Product Groups** tab. Select a row in the**Product Groups** grid.
2. In the heading at the top of the grid, click the **Export** icon.



3. The **Export Table** pop-up window opens. Enter a description in the field form. This will become your file name.



4. Select the**File Type** you would like the export file to be saved as.
5. Click **Export**.
6. If you wish to export Products, once you have navigated to the **Product Groups** tab, select a product in the **Products** grid and follow steps 2-5.

Adding Products to Dynamic Product Groups

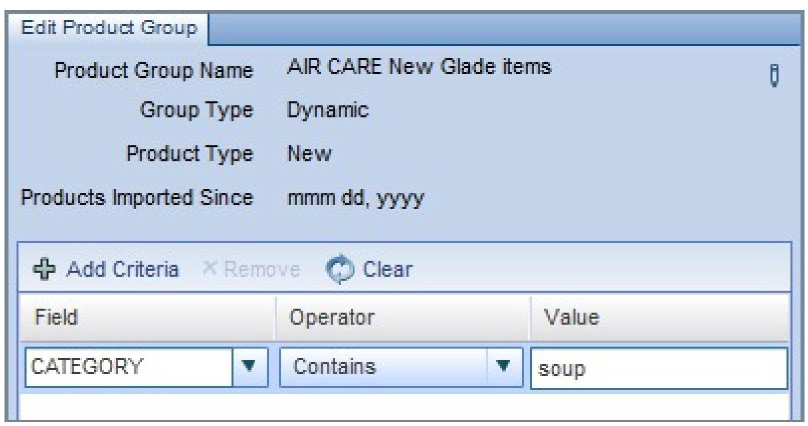
Use this procedure to add criteria for products to a dynamic product group

About this task

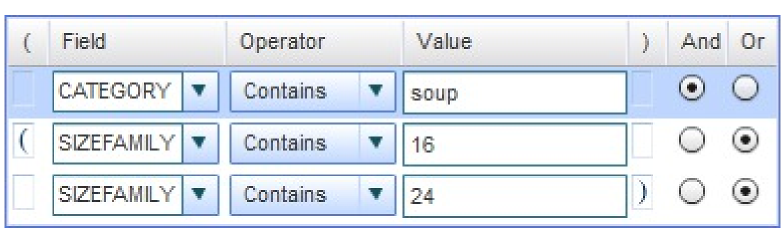
To add criteria for products to a dynamic product group:

Procedure

1. Select the group from the **Product Groups** grid.
2. Use the **Edit Product Group** panel to add search criteria. Click **Add Criteria**. Select a **Field** and **Operator**. Enter a search **Value**.



3. To add additional criteria, click **Add Criteria**. Open/close parentheses checkboxes and **And**/ **Or** radio buttons appear for each row. Use these to determine how multiple criteria are applied. In the example below, the **Category** field must contain “soup” and the **SizeFamily** field must contain either “16” or “24”.



4. In the **Advanced** panel, use the checkboxes to automatically include products which belong to the same line, brand family, size family, or Other1/2 family as products which meet the criteria.

   For example, in the Canned Soup category, Tomato 16OZ fits the category, but Chicken Noodle 18.8OZ does not. If these products belonged to the same brand family and you set the **Brand Family** checkbox, the application would add both products to the product group.
5. Click **View Products** to update the **Products** grid with all products currently fitting the criteria.
6. Click **Save** to apply your changes to the selected product group. If you open another group or leave the **Product Groups** page before saving, your changes are lost.

Markets

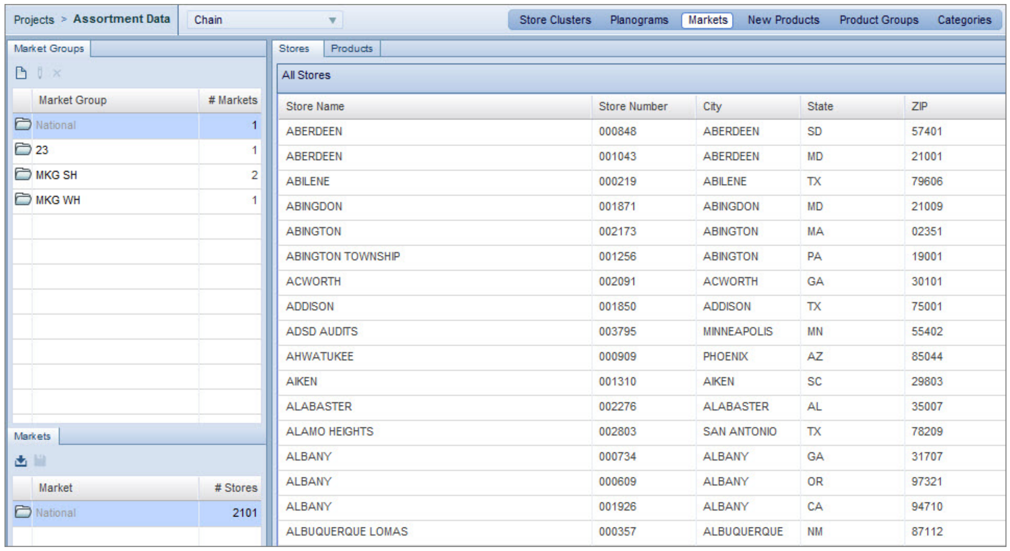
The Markets area allows you to upload and manage syndicated data for use in Assortment Optimization. You can create multiple market definitions with member markets and store-to-market ties, which are called Market Groups, throughout the application.

The **Markets** area allows you to upload and manage syndicated data for use in Assortment Optimization. You can create multiple market definitions with member markets and store-to-market ties, which are called **Market Groups** throughout the application. Often, the markets you create align with those used by syndicated data providers. Markets are division-specific, meaning that you must create and map markets for each division separately, if your company uses multiple divisions. You can use different market definitions across categories and even for the same category, and select from the market groups you created when optimizing.

Markets Page

On the Markets page, you can create multiple market definitions with member markets and store-to-market ties, which are called Market Groups.

This page contains a tab for **Market Groups** and **Markets**. When you highlight a Market Group in the **Market Groups** tab, the corresponding Markets will populate in the **Markets** tab. Additionally the corresponding Stores and Products will populate in the **Stores** and **Products** tab, respectively. The **National** folder under the Market Groups tab represents the National Market, which is a single market that automatically has all stores assigned to it. It can not be edited or deleted. This is typically reserved for national level syndicated data.



Sort this grid by clicking on the column headers. If there are more rows than Assortment Optimization can display on a single page, the sort only applies to the current page's rows. You can use the arrow buttons to view the other pages.

You can create multiple market definitions with member markets and store-to-market ties, which are called **Market Groups** throughout the application. Market Groups can not be imported. However, you can create a new Market Group by selecting the **New** icon under the **Market Groups** tab. You can also load movement data by category for multiple market groups. For more information, please see: "Importing Market Data" on page 24

Additionally, you can use different market definitions for the same category or across categories. When optimizing, you can select from the market groups that have movement data loaded for the scenario's category.

Related Topics

"Market Products" on page 45

"Importing Market Data" on page 24

Creating Market Groups

Use this procedure to create a new Market Group

About this task

To create a Market Group:

Procedure

1. From the **Assortment Data** area, click **Markets** on the header panel.
2. Under the **Market Group** tab, click the **Create** icon.
3. The **Create Market Group** window opens.
4. Enter the **Market Group Name** and click **OK**.
5. The new market group appears in the **Market Group** panel.

Assigning Stores to Market Groups

Use this procedure to assign stores to a market group

About this task

To assign stores to a market group:

Procedure

1. Select one or more stores in the **Stores** tab. Hold down the Shift key to select multiple rows sequentially or the Ctrl key to select non-sequentially.
2. Click on a selected store and drag it to the correct market in the **Markets** tab.
3. Click **Save**.

Importing Market Data

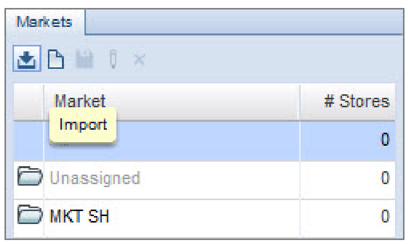
Use this procedure to import Market Data

About this task

To import market data:

Procedure

1. Click the **Import** icon.



2. The **Import Market Data** pop-up window opens.

3. Select the **Import Type**. Each selection has different options.
   - **Store to Market Assignment** allows you to bypass manual store to market mapping by importing the mappings. Assortment Optimization creates new markets for any used in the file that do not already exist. Select a **Market Group** from the drop-down menu.
   - **Market Products and Segments** imports products with segment information to add to Assortment Optimization as market products. Select a **Category** from the drop-down menu.

- **Market Movement** imports movement data for market products. Select a **Category** and **Market Group** from the drop-down menus. Aside from movement data, the only product data this file contains is the UPC. If the file contains products not currently in the system, you can import details for these products using the **Market Products and Segments** import.

4. If you wish to delete any existing data for each respective import type, select the checkbox at the bottom of the pop-up window. You would use this option if you wanted to "start fresh" when you import a new set of market data, and delete all associated products and movement.
5. Imported files must use specific column headings. If you do not have a file for import that uses these headings, click **Get Template** to download a template file for the import type.
6. Click **Browse** to locate and select the file. The file must be in either Excel or CSV format.
7. Click **Import**.

Exporting Market Products

Use this procedure to export Market Products

About this task

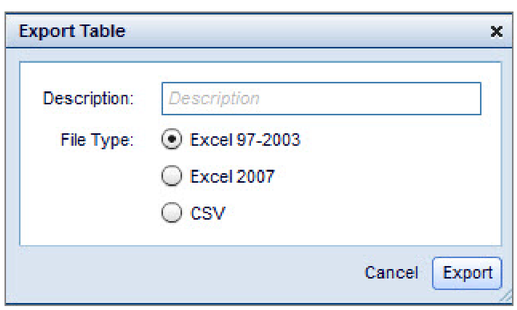
You can export Market Products for offline viewing in CSV or Excel format.

To export Market Products:

Procedure

1. In the **Assortment Data** area, navigate to the **Markets** tab. Select the**Products** panel.
2. In the heading at the top of the Products grid, click the **Export** icon.

3. The **Export Table** pop-up window opens. Enter a description in the field form. This will become your file name.



4. Select the **File Type** you would like the export file to be saved as.
5. Click **Export**.

Modifying Market Products

Use this procedure to modify market products

Using the **Markets** area, you have the following capabilities:

- “Editing Market Products” on page 26

- “Deleting Market Products”
- “Removing Products from Markets” on page 27

Related Topics

“Editing Market Products”

“Deleting Market Products”

“Removing Products from Markets” on page 27

Editing Market Products

Use this procedure to edit market products

About this task

You can modify the **UPC**, **Customer Key**, **Description**, **Segment**, **Sub-Segment**, **Brand** and **Manufacturer** values for any market product from the **Products** tab. IBM Omni-Channel Merchandising applies your changes at the product level, so the product details remain the same across all markets.

To edit product details:

Procedure

1. While viewing any market, open the **Products** tab.
2. Click **Edit** from the menu bar or right-click on the product row and choose **Edit**. The **Edit Market Product** dialog opens.

3. Make any necessary changes and click **OK** to save.

Deleting Market Products

Use this procedure to delete market products

About this task

If needed, you can delete market products from the application. This option permanently removes the products and deletes all associated movement data from all markets.

Note: You can also remove products from a specific markets. See “Removing Products from Markets” on page 27.

To delete one or more products:

Procedure

1. While viewing any market, open the **Products** tab.
2. Select one or more products. Hold down the **Ctrl** key while clicking to select non-sequentially or the **Shift** key to select sequentially.
3. Click **Delete** from the menu bar or right-click on the selected products and choose **Delete**.
4. Click **Yes** in the confirmation dialog box.

   Related Topics

   "Removing Products from Markets"

Removing Products from Markets

Use this procedure to remove products from markets

About this task

Using the **Products** tab, you can remove products from a specific market group. After removing a product, you cannot re-assign it to the market. This action deletes the product's movement data for the selected market but does not delete the product, as that product may exist in other markets. You cannot remove products from the National market.

To remove one or more products from a market:

Procedure

1. Open the market group for which you want to remove products. Open the **Products** tab.
2. Select one or more products. Hold down the **Ctrl** key while clicking to select non-sequentially or the **Shift** key to select sequentially.
3. Click the **Remove from Market** option from the menu bar or right-click on the selected products and choose **Remove from Market**.
4. Click **Yes** in the confirmation dialog box.

New Products

From the New Products area, you can create or import new products. New Products are newly-introduced products from the manufacturer, which you do not carry.

From the **New Products** area, you can create or import new products. New products are newly-introduced products from the manufacturer, which you do not carry. See "Product Types in Assortment Data" on page 35 for details.

Related Topics

"Product Types in Assortment Data" on page 35

Segment & Sub-Segment

During product attribution, your company assigns a segment and sub-segment to each product. When adding a new product, you must assign the segment and sub-segment product attributes from the values already used for other products in the category

During product attribution, your company assigns a segment and sub-segment to each product. Assortment Optimization works with you to create these segments. When adding a new product, you must assign the segment and sub-segment product attributes from the values already used for other products in the category. The optimization process uses data from other products in the same segment and sub-segment to forecast sales for the new product.

Creating New Products

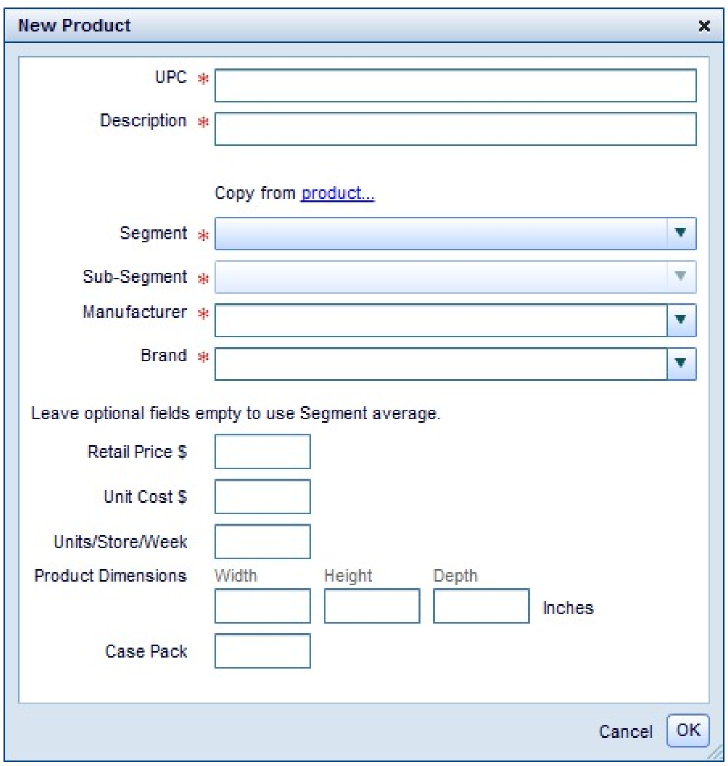
Use this procedure to create a new product

About this task

To create a new product:

Procedure

1. Click **New**. The **New Product** window opens.



2. Enter the **UPC** and a **Product Description** that makes the product easily identifiable.
3. To copy product details (segment, brand, etc.) and modeling coefficients from an existing product, click **Copy from product**. See "Linking New Products" on page 29 for details.
4. Select a **Segment**, **Sub-Segment**, **Manufacturer** and **Brand**. These fields are required.

5. If you have the information for the optional fields (**Retail Price**, **Product Dimensions**, etc.), enter those values. If you do not provide this information, IBM Omni-Channel Merchandising uses the segment average for each field. You can modify these fields later.
6. Click **OK**.

   Related Topics

   "Linking New Products"

Linking New Products

Use this procedure to link new products

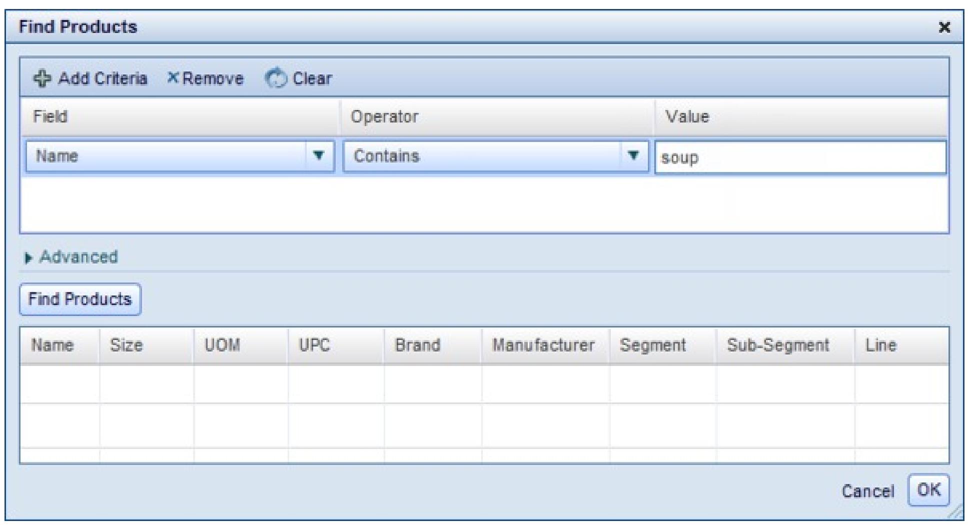
About this task

When you link a new product to an existing product, details and attributes are copied from the existing product onto the new product.

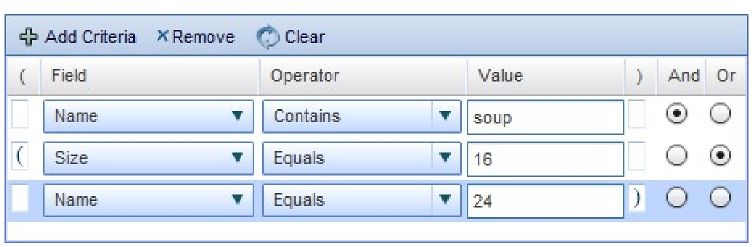
To link a product:

Procedure

1. From the **New Product** dialog, click **Copy from product**. The **Find Products** dialog opens.
2. Select a **Field** and **Operator**. Enter a search **Value**.



3. To add additional criteria, click **Add Criteria**. Open/close parentheses checkboxes and **And**/ **Or** radio buttons appear for each row. Use these to determine how multiple criteria are applied. In the example below, the **Name** field must contain "soup" and the **Size** field must contain either "16" or "24".



Note: The **And**/**Or** radio buttons which appear in the last row have no effect.

4. In the **Advanced** panel, use the checkboxes to automatically include products which belong to the same line, brand family, size family, or Other1/2 family as products which meet the criteria.

For example, Tomato Soup 16OZ fits the criteria, but Chicken Noodle Soup 18.8OZ does not. If these products belonged to the same brand family and you set the **Brand Family** checkbox, the application would return both products in the search results.

5. Click **Find Products**.
6. Select a product and click **OK**.
7. Modify details in the **New Product** dialog as needed. Click **OK** to save the product details and product link.

Importing New Products

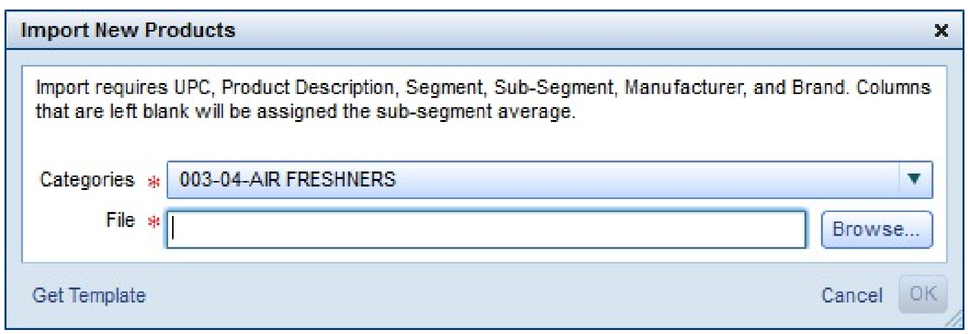
Use this procedure to import new products

About this task

To import one or more new products:

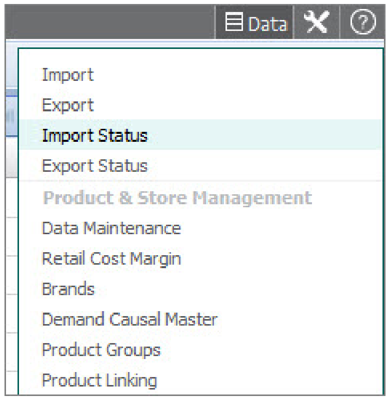
Procedure

1. Click **Import**. The **Import New Products** window opens.

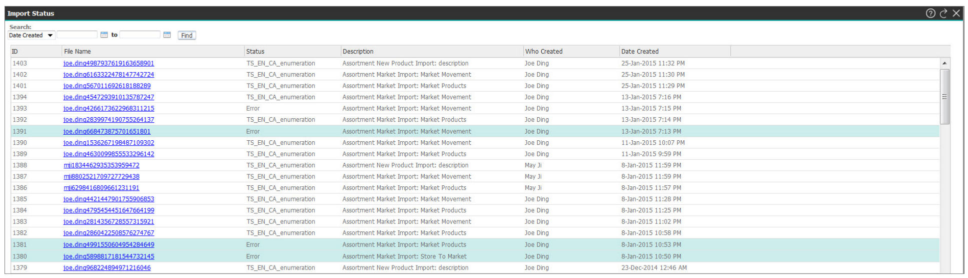


2. If you do not already have a file for import in the correct format, click **Get Template** and download the template file. This file provides all required fields, correctly formatted for import. Use this template to create your new product file. The file can be in Excel or .CSV format.

   The following fields are required: **UPC**, **Description**, **Segment**, **Sub-Segment**, **Brand** and **Manufacturer**.
3. Select a **Category**.
4. Click **Browse** to locate and select the file on your computer.
5. Click **OK**.
6. If there are errors, navigate to **Import Status** from the **Data** maintenance pages.



From there, you will see a list of imports you have performed, along with the status of the job and the type of errors that occurred, if any.



Correct the errors and re-import the file.

Import Templates

Import Templates list the fields required for import.

After you click **Get Template** in the import pop-up window, the template you downloaded will list the required fields, but not the required format of these fields. The following table lists the required formats for importing to Excel:

Import Type	Text	Positive Numbers	Positive Number or Currency
New Products	UPC, Description, Segment, Sub-segment, Brand, Manufacturer	UPSPW, Case Pack, Height, Width, Depth	Retail Price, Cost
Store to Market Assignment	Store Number, Market Name		
Market Movement	Market, UPC, End Date	# Weeks, Sales Units, % ACV	Sales Dollars
Market Products and Segments	UPC, Customer Key, Name, Segment, Sub-Segment, Brand, Manufacturer		
Product Groups	Product Group name, UPC		

Exporting New Products

Use this procedure to export new products

About this task

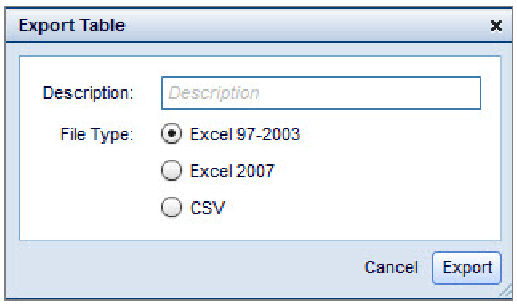
You can export New Products for offline viewing in CSV or Excel format.

To export New Products:

Procedure

1. In the **Assortment Data** area, click on the **New Products** tab. Select a row in the**New products** grid.
2. In the heading at the top of the grid, click the **Export** icon.

3. The **Export Table** pop-up window opens. Enter a description in the field form. This will become your file name.



4. Select the**File Type** you would like the export file to be saved as.
5. Click **Export**.

Editing New Products

Use this procedure to edit new products

In the **New Products** grid, all fields except **Date Created**, **Segment** and **Sub-Segment** are editable.

To edit, click in a field and enter a new value. Click anywhere else on the screen to save the value.

Deleting New Products

In the New Products area, you can delete an individual new product or delete all new products from a specific category.

About this task

In the New Products area, you can delete an individual new product or delete all new products from a specific category.

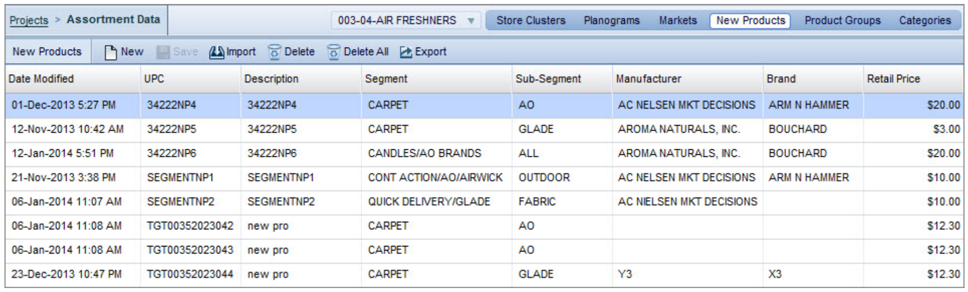
To delete an individual new product:

Procedure

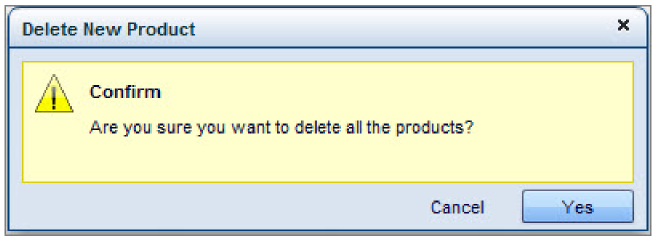
1. Highlight a product in the **New Products** grid.
2. Click **Delete**.

   To delete all new products from a category:

3. Select the desired category from the category drop-down menu at the top of the page.
4. Click **Delete All**.



5. The **Delete New Product** pop-up window opens.

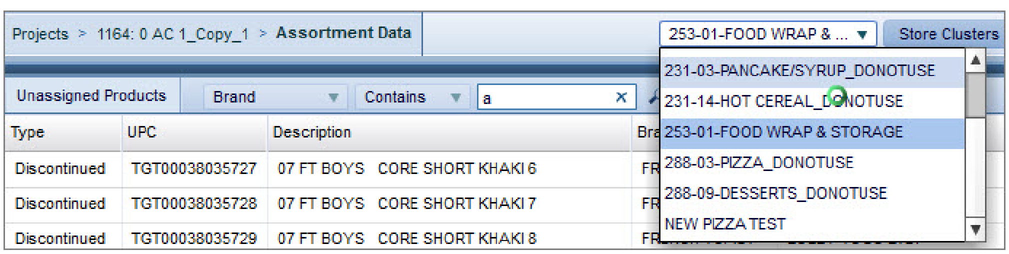


6. Click **Yes** to confirm.

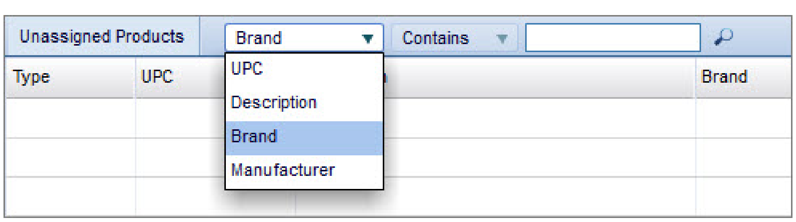
Categories

The Categories area displays the segments and sub-segments for a particular category and their member products.

The **Categories** area displays the segments and sub-segments for a particular category and their member products. To select which category results are displayed, navigate to the category drop-down menu at the top of the screen:

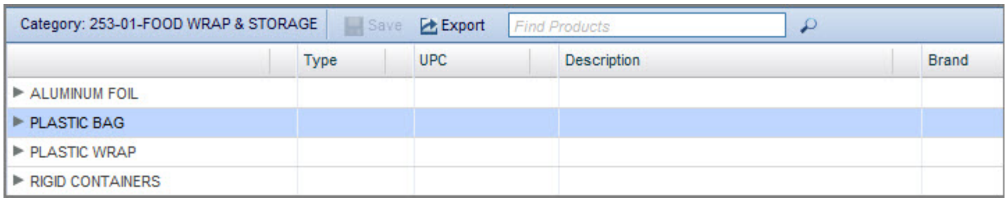


The Categories area also allows you to search for unassigned products and assign them to a segment or sub-segment. To search for unassigned products, use the drop-down menu in the **Unassigned Products** tab to search on **UPC**, **Description**, **Brand**, or **Manufacturer**. Use the search operators in the second drop-down menu to refine your search.

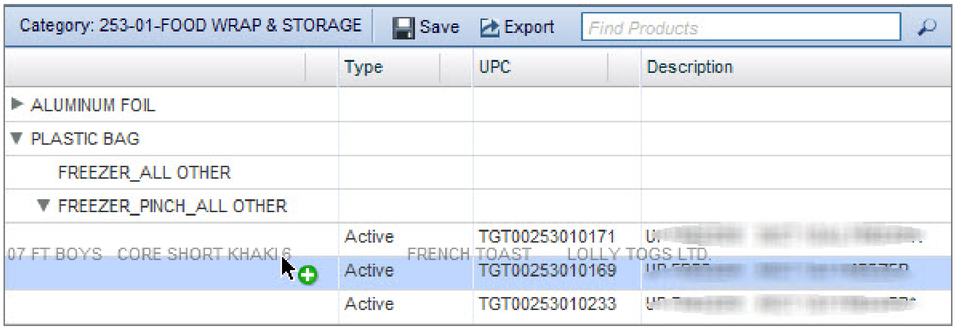


Click the magnifying glass icon, and the results will populate in the **Unassigned Products** grid.

The right side of the screen displays the segments and sub-segments within the category listed at the top. You can also use the search field to find products.

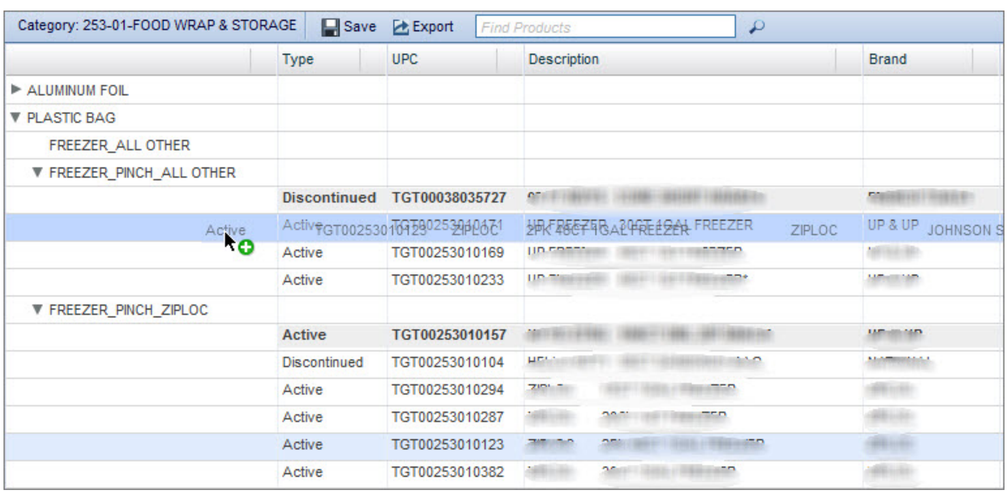


Once you have drilled down to the segments and sub-segments, you can then drag and drop an unassigned product to a particular segment or sub-segment.



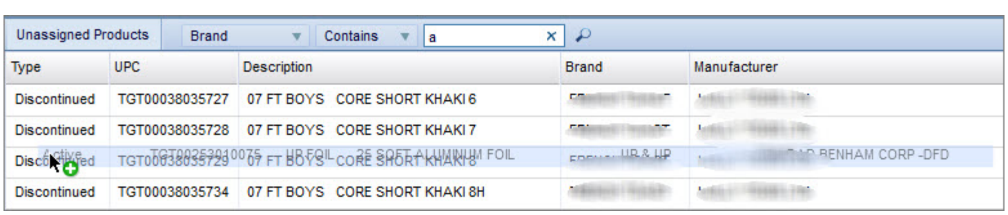
Click **Save**.

Similarly, you can move products that are already assigned to a segment and sub-segment and move them to another. To reassign a product from one sub-segment to another, drag and drop the product across sub-segments in the right panel:



Click **Save**.

To remove a product from a category, drag and drop a product from the right side of the screen to the **Unassigned Products** tab on the left.



Click **Save**.

You can export the Category grid by clicking **Export** at the top of the grid.

Note: The **Categories** area will be read-only and you will not be able to reassign products without a particular system setting; talk to your system administrator for more details.

Product Types in Assortment Data

These are the product types shown in the Assortment Data pages

- **New**: A newly-introduced product from the manufacturer. These products do not have associated syndicated or transaction log data. Assortment Optimization bases any forecasts for new products on user-entered forecasts and data from other products in the same segment and sub-segment. IBM Omni-Channel Merchandising stores new products separately from the product file.
- **Market**: A product currently sold by competitors, but not carried in your stores. These products have syndicated data. IBM Omni-Channel Merchandising only stores market products separately from the product file.
- **Discontinued**: A product previously carried in your stores. These products have transaction log data from the period in which you carried them and may also have syndicated data. Discontinued products belong to your IBM Omni-Channel Merchandising product file.
- **Active**: A product currently carried in your stores. These products have transaction log and syndicated data. Active products belong to your IBM Omni-Channel Merchandising product file.
- All: Includes all of the above product types. The criteria that you specify is not type-specific. You can create combinations of product types by deslecting any product types you don't wish to include.

These are the product types shown in Assortment Data. When viewing products in the **Detailed Results** report for an optimized scenario, IBM Omni-Channel Merchandising uses additional product types. See "Product Types in Optimized Scenarios" on page 78 for details.

Chapter 3. Projects & Scenarios

A project is a grouping of scenarios which attempt to solve the same problem.

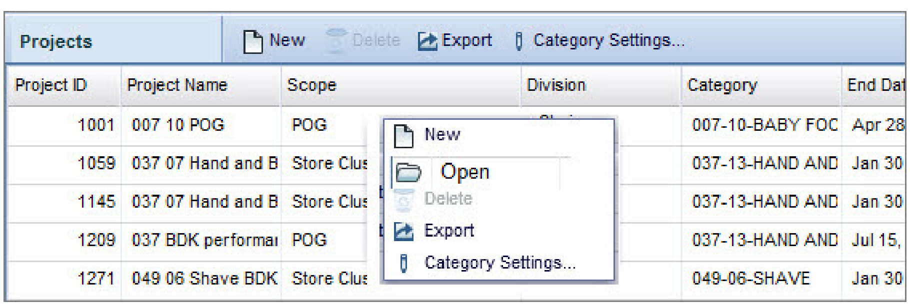
A project is a grouping of scenarios which attempt to solve the same problem. When you create a project, you select the scope of the project as either a planogram or a store cluster group, division and category. Individual scenarios use the same scope type defined for the project, but can vary in the individual store clusters, consideration set and rules selections.

As a simple example, the Air Fresheners Spring 2012 project for Planogram 112 contains three scenarios. One scenario attempts to determine the planogram's baseline values by not allowing any new or market products in the assortment. The second scenario allows new and market products, but sets a "hurdle rate" of 20%, meaning that the suggested products must perform 20% better than products currently carried. The third scenario allows new and market products, but sets a "hurdle rate" of 30%. The application creates an optimized assortment for each scenario and forecasts the assortment's results. You can use these forecasts to answer the question "What products should I carry in the set of stores tied to Planogram 112 for Spring 2012?"

Projects Page

The Projects page shows all projects that belong to categories which you have permission to access.

The **Projects** page shows all projects that belong to categories which you have permission to access. The Projects page is sorted by **Project ID** by default. To view an existing project, double-click on it from the grid, or right click on it and select **Open**. The **Project Details** page opens.



Creating Projects

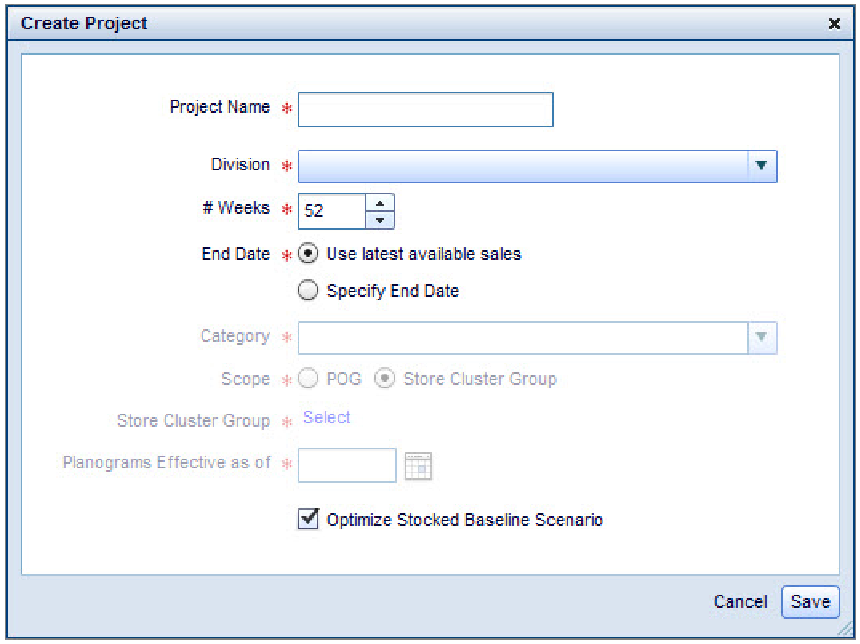
Use this procedure to create a new project

About this task

To create a project:

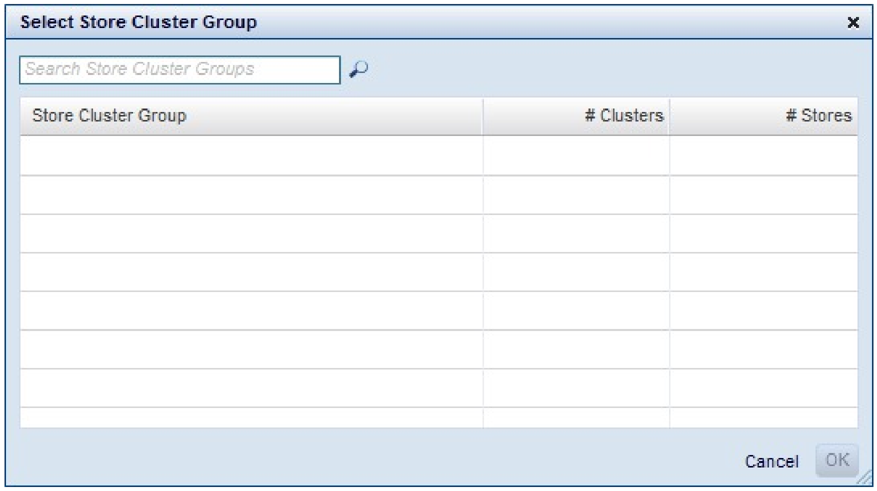
Procedure

1. From the **Projects** page, click **New**. The **Create Project** window opens.



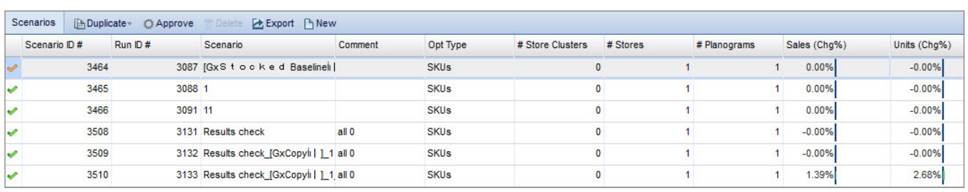
2. Enter a descriptive **Project Name** and select a **Division** from the drop-down menu.
3. Select data for Assortment Optimization to use in analyzing and optimizing the scenarios. Enter a number of weeks of **Historical Sales** data and set an end date for the last week of data by selecting the **Specify End Date** option. For example, you could set 52 weeks ending on 2/5/2012 to use all historical sales data from 2/6/2011 through 2/5/2012. You can also select the **Use latest available sales** option to automatically use the last week of available sales data as the end date.
4. Select a **Category**. Only categories which you have permission to access will appear in the drop-down menu.
5. Set the scope to **POG** (planogram) or **Store Cluster Group**. Enter a planogram number or select a group and set an effective date for planograms to be considered.

   To select a store cluster group, click **Select**. Use the search to locate the group. Select the group and click **OK**.



Planogram optimizations look at a single planogram in every store where it is used. By default, store cluster group optimizations look at every planogram in the store cluster group for the selected category, division and effective date. If needed, you can choose specific store clusters to exclude. When using store cluster groups, you can also modify rules and consideration sets for specific store clusters within the group.

6. Enter a **Scenario Name** and a descriptive **Comment** for the first scenario.
7. The **Optimize a Stocked Baseline Scenario** option will be selected by default. Whenever a new **Project** is created, a baseline scenario with the current stocked assortment is also automatically created. Selecting this option enables you to optimize that baseline scenario. The optimized baseline scenario will be displayed with an orange checkmark next to it in the scenarios grid. It will always appear at the top of the grid. .



Scenario ID #	Run ID #	Scenario	Comment	Opt Type	# Store Clusters	# Stores	# Planograms	Sales (Chg%)	Units (Chg%)
3464	3087	[GxS t o c k e d Baseline		SKUs	0	1	1	0.00%	-0.00%
3465	3088	1		SKUs	0	1	1	0.00%	-0.00%
3466	3091	11		SKUs	0	1	1	0.00%	-0.00%
3508	3131	Results check	all 0	SKUs	0	1	1	-0.00%	-0.00%
3509	3132	Results check_[GxCopy]_1	all 0	SKUs	0	1	1	-0.00%	-0.00%
3510	3133	Results check_[GxCopy]_1	all 0	SKUs	0	1	1	1.39%	2.68%

If the baseline scenario is not optimized, the checkmark will be empty. The baseline scenario is read-only and cannot be edited, but can be duplicated, and the duplicate can be edited. In addition, the baseline scenario will always be the first scenario added to the **Compare** report.

8. Click **Save**. The **Project Details** page opens.

Duplicating Projects

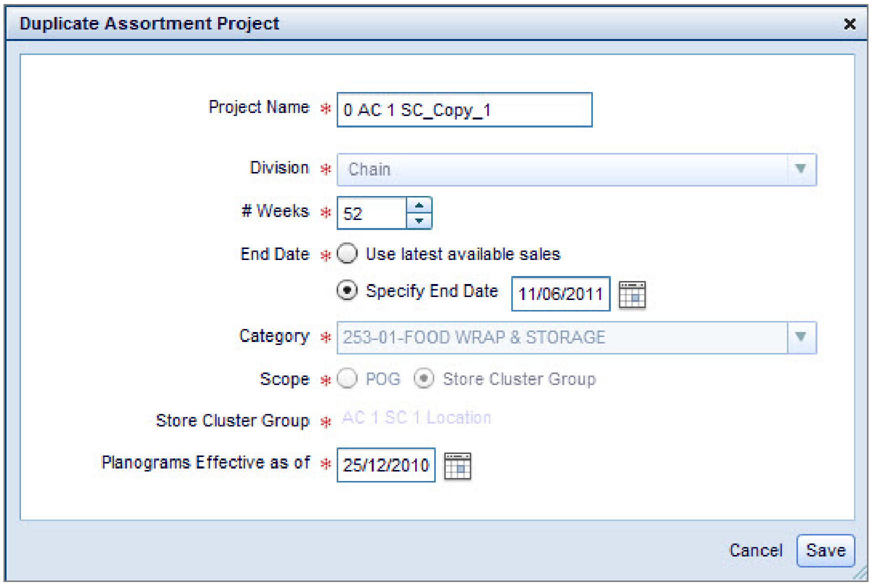
Use this procedure to duplicate an existing project

About this task

You may want to duplicate a project to build off of analysis from previous optimizations. To duplicate a project:

Procedure

1. From the **Projects** page, click **Duplicate**. The **Duplicate Assortment Project** window opens.



2. Enter a descriptive **Project Name**.
3. Enter a number of weeks of **Historical Sales** data and set an end date for the last week of data.

   For example, set 52 weeks ending on 11/06/2011 to use all historical sales data from 11/06/2010 through 11/06/2011. You can also set the latest date with available sales data as the end date by selecting the **Use latest available sales** option.
4. Set an effective date for planograms to be considered.
5. Click **Save**.

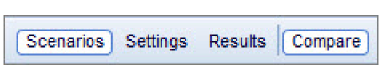
   Note: You will not be able to duplicate a project if:
   - The Store Cluster Groups specified in the Scope or used in the original project have been deleted.
   - The Store Cluster Group contains no Store Clusters with assigned stores.

   If a scenario or rule in the original project applies to only deleted store clusters, remove any scenarios and rules that apply to only deleted clusters, and retain the scenarios or rules that apply to existing store clusters.

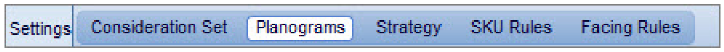
Project Details Page

Displays details for an individual project and scenarios and allows you to perform a variety of actions for them.

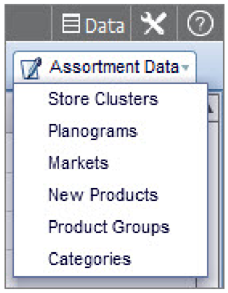
On the **Project Details** page, use the menu bar to show/hide the **Scenarios**, **Settings**, **Results**, and **Compare** panels. When the panel is enclosed in a blue box, the panel is visible.



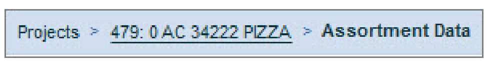
Within the **Settings** panel, use the buttons to open the **Consideration Set**, **Planograms**, **Strategy**, **SKU Rules** or **Facing Rules** panels.



From the **Project Details** page, you can access the Assortment Data maintenance pages associated with the project. To do so, navigate to the **Assortment Data** drop-down menu on the menu bar.



Selecting an option will open its corresponding area in the Data maintenance pages, with the information filtered by the current project. To return to the **Project Details** page you were on before, click the <project name> link at the top navigation bar.



Creating Scenarios

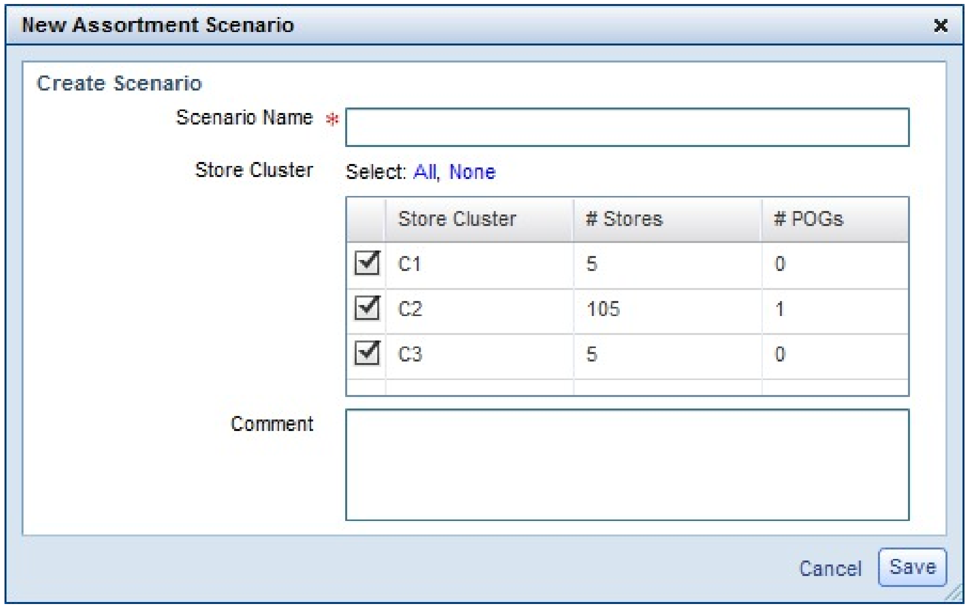
Use this procedure to create scenarios for a project from the Project Details page.

About this task

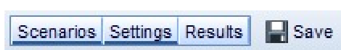
You can create scenarios for a project from the **Project Details** page:

Procedure

1. Click **New** in the **Scenarios** grid.
2. Enter a **Scenario Name**. If using a store cluster group as the project scope, you can select specific store clusters for the scenario. Enter a descriptive **Comment** to help you identify the scenario. Click **Save**.



3. In the **Consideration Set** panel, select the product types that Assortment Optimization considers for the optimized scenario. See "Consideration Set" for details.
4. Use the **SKU Rules** and **Facing Rules** panels to set restrictions and product evaluation criteria for the optimized scenario. See "Rules" on page 50 for details.
5. Click **Save** in the menu bar.



6. Continue by creating additional scenarios or optimizing the current scenario. See "Optimizing Scenarios" on page 73.

Related Topics

"Consideration Set"

"Rules" on page 50

Consideration Set

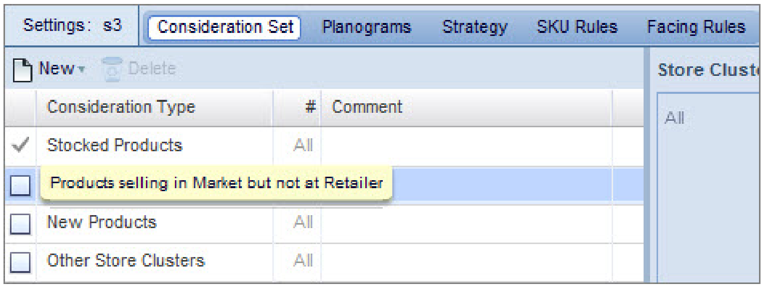
The consideration set is the set of products which Assortment Optimization takes into account during optimization.

The consideration set is the set of products which Assortment Optimization takes into account during optimization. The following are consideration set types:

Type	Description
"Market Products" on page 45	Include market products in your optimization.
"New Products" on page 45	Include new products in your optimization.
"Stocked Products" on page 46	Include currently stocked products in your optimization.

Type	Description
“Other Store Clusters” on page 47	Include products from other store clusters in the scenario's store cluster group. It can include the following products: Stocked, Stocked No Sales, and/or Has Sales.

For further explanations of consideration set types, hover your mouse over any of the values in the **Consideration Type** column to open an informational tooltip. The below example displays the tooltip for **Market Products**:



You can use the checkboxes to include or exclude each consideration set type or to set product group actions. You cannot exclude the default **Stocked Products** item because optimization always considers stocked items, as opposed to market or new items, which you may want to include or exclude for consideration during an optimization.

You can also define different consideration sets between store clusters. For example, you could allow market, new and stocked items for Store Cluster A, but only market and stocked items for Store Cluster B.

If you create consideration set types for specific store clusters, the **Comment** field can help you track the items. The **#** field shows the number of store clusters selected for the item.

Related Topics

“Market Products” on page 45

“New Products” on page 45

“Stocked Products” on page 46

“Other Store Clusters” on page 47

Creating Store Cluster-Specific Consideration Sets

Use this procedure to create a new item in the consideration set

About this task

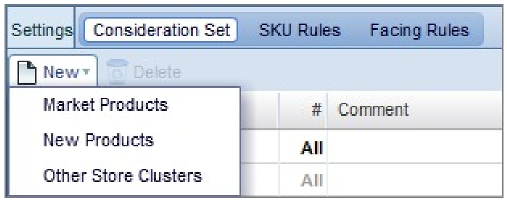
You can add additional consideration set items that are store cluster-specific, if you select a store cluster group as the scope for your project. Additional consideration set items allow you to modify settings by store cluster.

The default consideration set items always apply to all store clusters, but any additional items you create will override the defaults for their selected store clusters. You can use the **Comment** field in the **Consideration Set** panel to track rules you create. The **#** field shows the number of store clusters selected for the item.

To create a new item in the consideration set:

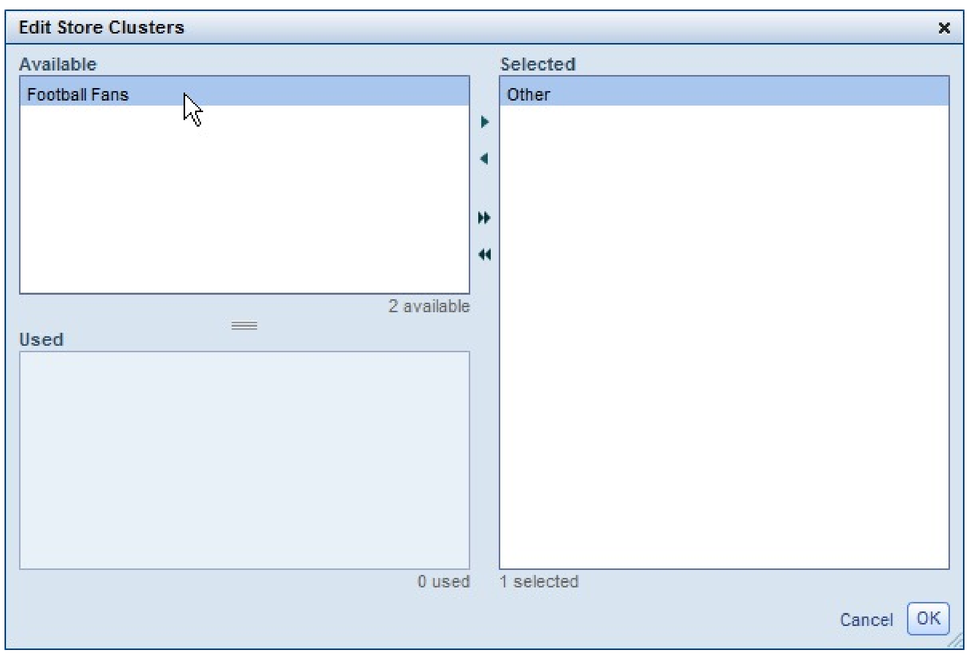
Procedure

1. Click **New** in the **Consideration Set** panel and select the type from the drop-down list.



2. Click the **Edit Store Cluster** icon.

3. In the dialog box, click and drag clusters between the **Available** and **Selected** lists. You can also use the arrows or double click your selections. The **Used** field shows any store clusters selected for a different consideration set item of the same type.



4. Click **OK**.

Deleting Consideration Set Items

Use this procedure to delete a consideration set item

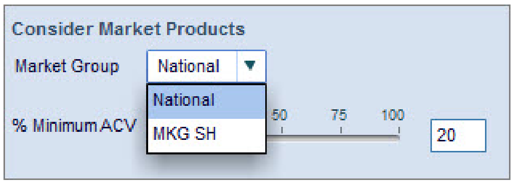
To delete a consideration set item, highlight the item and click **Delete** in the **Consideration Set** panel. You cannot delete default items.

Market Products

You can choose the scope of market data from which to use market products and a minimum ACV% for included products. Use this procedure to configure Market Products settings

About this task

You can choose the scope of market data from which to use market products and a minimum ACV% for included products. The ACV value comes from syndicated data loaded in IBM Omni-Channel Merchandising.



To configure Market Products settings:

Procedure

1. In the **Consider Market Products** area, select the market data to use for the optimization from the **Market Group** drop-down menu. You can choose **National**, a single market with all stores assigned to it, or any of the Market Groups that you created on the **Markets** page.
2. Enter a **Minimum ACV** value for considered items. You can set the Minimum ACV by moving the slider or by directly entering a value in the field.

   Related Topics

   "Markets" on page 22

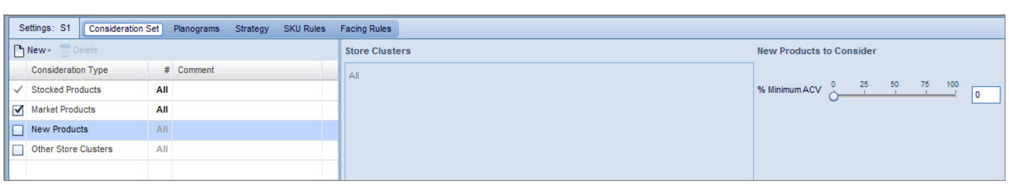
   "Markets Page" on page 22

New Products

When you include new products in your consideration set, optimization considers all new products which were imported from the New Products page

When you include new products in your consideration set, the **Details** panel appears empty. However, the optimization considers all new products which were imported from the "New Products" page.

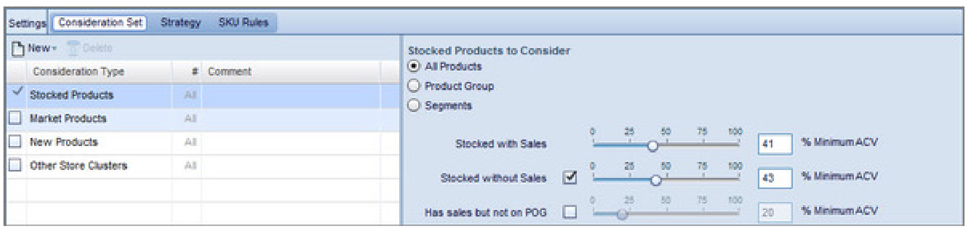
To the right there is an ACV bar labeled **New Products to Consider**. This allows you to ensure that the ACV is not too small when borrowing ACV from Stocked Products for New Products. You can set the ACV by using the slider bar or manually typing a value in the adjacent form field.



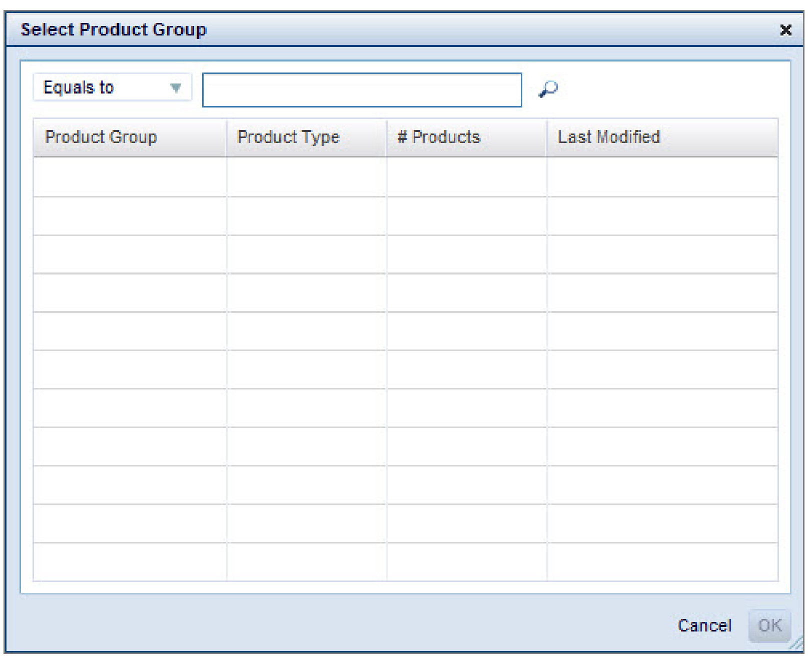
Stocked Products

For stocked products, you can set a minimum ACV for included products, meaning that Assortment Optimization excludes products which fall below the specified ACV from the assortment.

For stocked products, you can set a minimum ACV for included products, meaning that Assortment Optimization excludes products which fall below the specified ACV from the assortment. For Market Products, the ACV value comes from syndicated data loaded in the application. For Stocked Products, the ACV value comes from sales data. You can set a minimum ACV for the following products: Stocked with Sales, Stocked without Sales, and Has Sales but not on POG. Each product type will have a corresponding ACV bar. You can set the Minimum ACV by moving the slider or by directly entering a value into the adjacent field. To set the Minimum ACV for **Stocked without Sales** or **Has sales but not on POG**, select their corresponding check-boxes and set the Minimum ACV in the same manner. Adjust these thresholds accordingly based on the Products, Store Clusters, and Planograms that you are optimizing for.

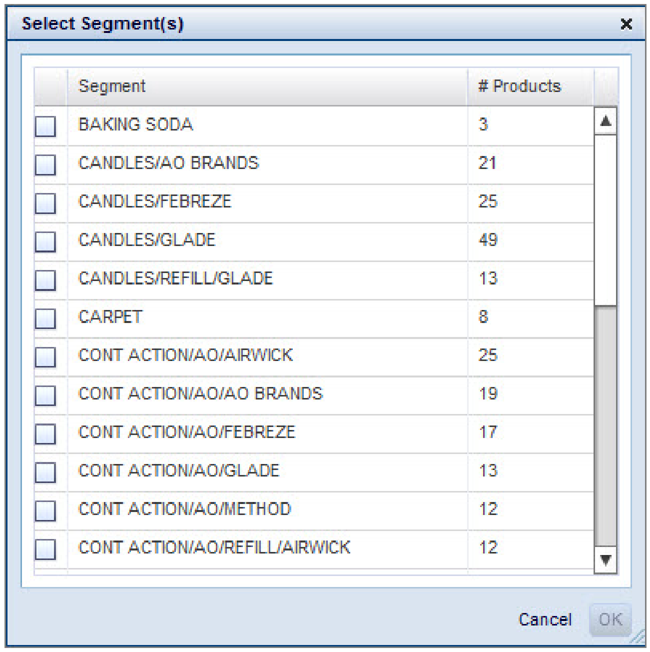


The default products to consider are **All Products**, but you can also select **Product Group** or **Segments**. When you select **Product Group**, a **Select** button appears. If you click it, the **Select Product Group** pop-up window opens.



Search for the appropriate Product Group using the drop-down menu to search for **Equals to**, **Contains**, or **Starts with** operators and click the magnifying glass icon. Once you have selected the desired Product Groups, click**OK**.

When you select **Segments**, a **Select** button appears. If you click it, the **Select Segments** pop-up window opens.

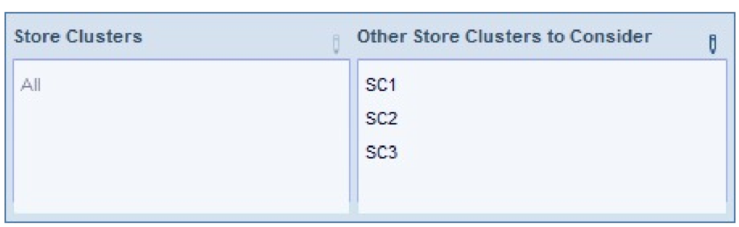


Select the appropriate segment(s) using the checkboxes and click **OK**.

Other Store Clusters

For this consideration set type, you can choose the store clusters from which to consider stocked and unstocked products. Specifically, you can include the following items: Stocked, Stocked No Sales, and/or Has Sales.

For this consideration set type, you can choose the store clusters from which to consider stocked and unstocked products. Specifically, you can include the following items: Stocked, Stocked No Sales, and/or Has Sales. For example, you could consider stocked products from store clusters SC1 and SC2, but not from SC3. Only store clusters within the scenario's store cluster group are valid. The store cluster selection process is the same as in "Creating Store Cluster-Specific Consideration Sets" on page 43.



Note: This consideration set type can only be used with scenarios that use the store cluster group scope.

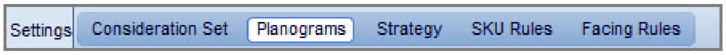
Related Topics

"Creating Store Cluster-Specific Consideration Sets" on page 43

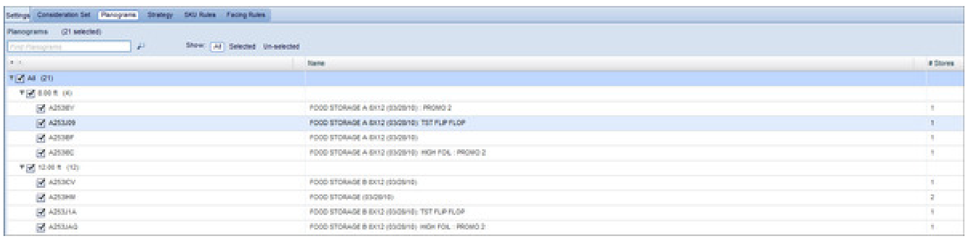
Planograms Setting

The Planogram section under the Settings tab allows you to filter all planograms associated with the stores and categories in the scenario to a subset of planograms you want to optimize.

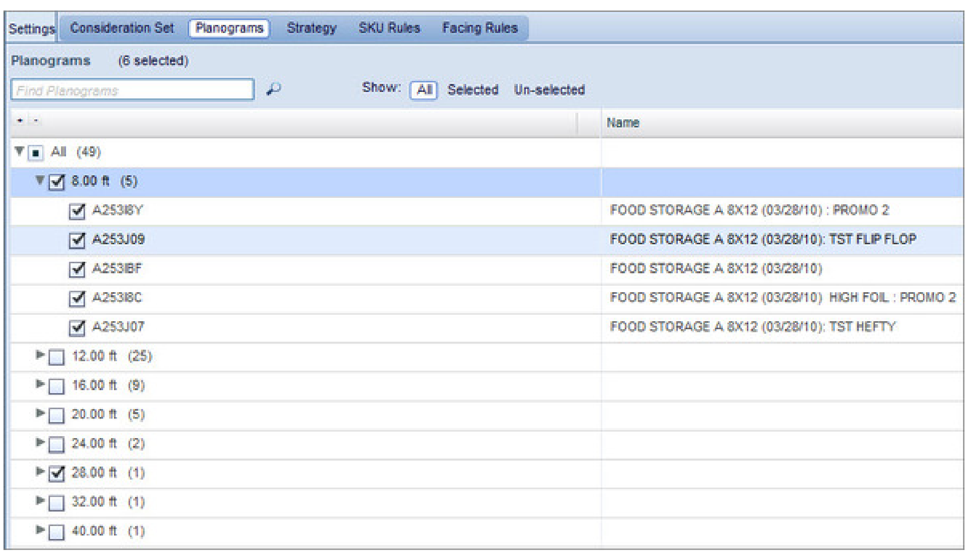
The **Planogram** section under the **Settings** tab allows you to filter all planograms associated with the stores and categories in the scenario to a subset of planograms you want to optimize.



Note: This section is only available under **Settings** if a Project's scope is set to Store Cluster Group.



The planograms will be organized by footage. By default, the **All** checkbox will be selected, which means all planograms tied to all stores and categories in the scenario will be applied. To select subsets of Planograms instead, deselect the **All** checkbox. Then, select the appropriate planograms by using the checkboxes and expanding the hierarchies as necessary.

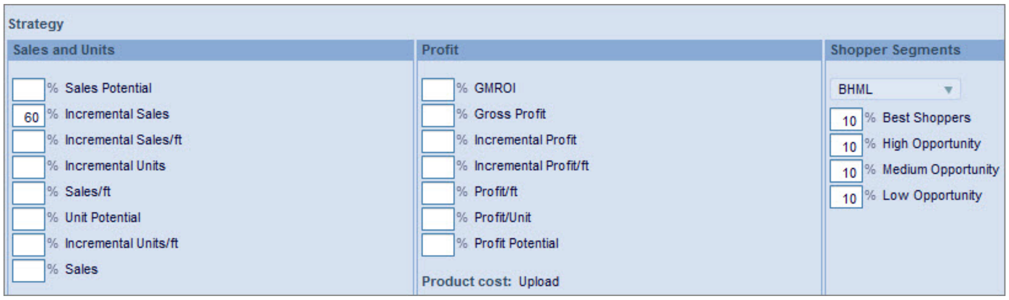


You can use the Find Planograms search field to search for Planograms to apply, and toggle between viewing all planograms (**All**), only those you have selected (**Selected**), or only those you have not selected (**Un-selected**).

Strategy

The Strategy section under the Settings tab, which is used for SKU and facings optimizations, determines the criteria on which the application optimizes.

The **Strategy** section under the **Settings** tab, which is used for SKU and facings optimizations, determines the criteria on which the application optimizes. For example, your strategy could focus on attracting and maintaining key shopper segments or on maximizing gross profit. More importantly, the Strategy panel can balance different goals by allocating weight among multiple objectives. For example, you could set Best Shoppers (segment) to 10%, High Opportunity to 10%, Medium Opportunity to 10%, Low Opportunity to 10%, and Incremental Sales to 60%.



Enter values between 1 and 100 next to the criteria you want to use. You can leave values which should be 0 blank. The **Total** field in the top right corner shows the current total. All values must total 100. You can set specific **Shopper Segments** in the drop-down menu.

Optimizing with Cost Changes

Use this procedure to optimize for profit with user-entered costs for products. This is useful when you want to use new costs that you recently negotiated with vendors rather than historical data for optimization.

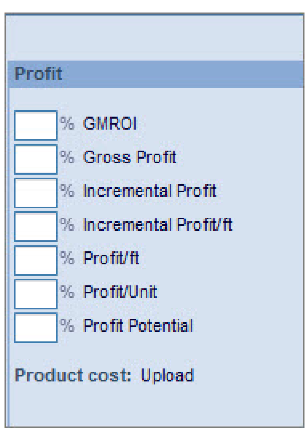
About this task

You can use user-entered costs for products when you optimize for profit. This is useful when you want to use new costs that you recently negotiated with vendors rather than historical data for optimization. You can optimize with the new costs to identify the best products to carry in your assortment.

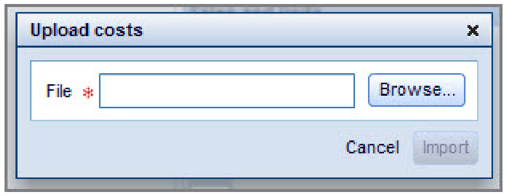
To optimize with cost changes:

Procedure

1. Navigate to the **Strategy** area under the **Settings** panel.
2. Under the **Profit** header, select **Product cost: Upload**.



3. The **Upload costs** pop-up window opens.



4. Click **Browse** and upload a file in Excel or CSV format. The file must have **UPC**, **Description**, **Cost**, and **Store Cluster** fields.

   Note: You can upload only one cost file per scenario. If you need to add more products with new costs, you must delete the current product cost file and upload a new file with all of the product costs. If the product cost file is deleted, optimization uses historical data and behaves as normal.

Rules

Rules dictate how Assortment Optimization evaluates products and set restrictions on the optimized scenario.

Rules dictate how Assortment Optimization evaluates products and set restrictions on the optimized scenario. For example, the SKU Count rule could dictate that the number of SKUs for 12 ft. planograms must increase by 20%. Certain rule types only apply in facings or SKU optimizations. Rules appear in the **Strategy**, **Facing Rules**, and **SKU Rules** panels.

Each scenario contains one of every rule type by default, which apply to all store clusters in the scenario. You can add additional rules that are store cluster-specific for some rule types, but you cannot delete the default rules that apply to all clusters. See “Creating Store Cluster-Specific Rules” on page 52.

Assortment Optimization uses the following rule types:

“Facings Rule” on page 54	Maintain or set a custom range for the number of per-product facings on planograms, by planogram width.	Facings optimizations	**Facing Rules** panel
“Hurdle Rate Rule” on page 56	Add a hurdle rate (0-100%) for SKUs not currently included in the assortment. Forecasts for products not currently in the assortment must show that the products perform __% better than current products.	All optimizations	**SKU Rules** panel

"SKU Count Rule" on page 57	Maintain, increase/decrease by a percentage/number or set a maximum number of SKUs on a planogram, by planogram width.	SKU optimizations	**SKU Rules** panel
"Shelf Stocking Rule" on page 60	Set the minimum and maximum days of supply available on the shelf for products, based on forecasted sales. **Note:** The settings apply to all store clusters.	Facings optimizations	**Facing Rules** panel
"Strategy" on page 48	Weigh specific objectives within Sales and Units, Profit, and Shopper Segments to a total of 100%. For example: 50% Incremental $, 10% Gross Profit, 40% various Shopper Segments.	All optimizations	**Strategy** panel
"Final Distribution" on page 60	Set a Minimum ACV value when scaling from Potentials to Actuals in optimized results	All optimizations	**SKU Rules**
"Product Group Actions" on page 61	Sets specific actions for products in a selected product group. The actions can either be In, Out, or Maintain. You can deactivate this rule.	All optimizations	**SKU Rules** panel
"Brand Actions" on page 62	Sets specific actions for brands. The actions can either be In, Out, or Maintain. You can deactivate this rule.	All optimizations	**SKU Rules** panel
"Segment Actions" on page 62	Sets specific actions for segments. The actions can either be In, Out, or Maintain. You can deactivate this rule.	All optimizations	**SKU Rules** panel

“Collection Rule” on page 61	A user-defined group of products that needs to be considered collectively by the optimization such that either EVERY product or NO product in the collection will be considered in the final assortment.	SKU optimizations	**SKU Rules** panel
“Product Age” on page 63	Protect products that have been recently introduced and thus have a low ACV. Considers the length of time a product has been scanning at the cluster or planogram-level to determine which products to retain.	SKU optimizations	**SKU Rules** panel

Related Topics

“Creating Store Cluster-Specific Rules”
“Facings Rule” on page 54
“Hurdle Rate Rule” on page 56
“SKU Count Rule” on page 57
“Shelf Stocking Rule” on page 60
“Strategy” on page 48
“Product Group Actions” on page 61
“Brand Actions” on page 62
“Segment Actions” on page 62
“Collection Rule” on page 61
“Product Age” on page 63

Creating Store Cluster-Specific Rules

Use this procedure to create a new Store Cluster-specific rule.

About this task

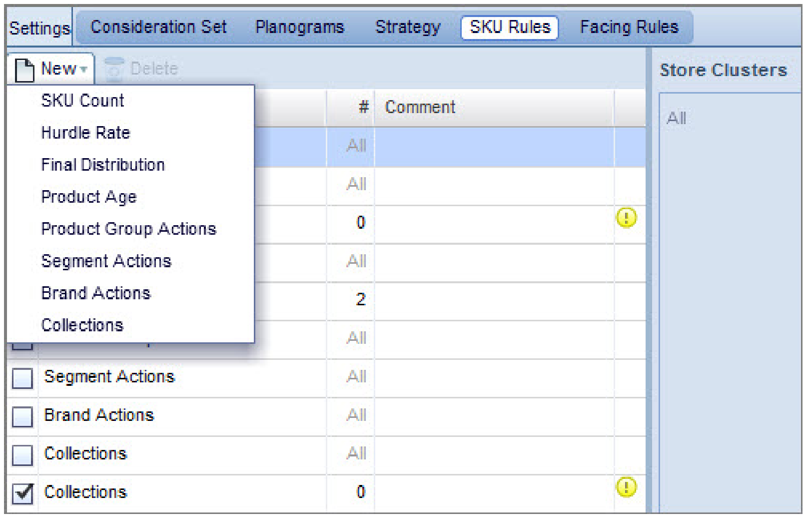
You can add additional Strategy, SKU Count, Product Group Actions, Hurdle Rate or Facings rules that are store cluster-specific, if you select a store cluster group as the scope for your project. Additional rules allow you to modify settings by store cluster. For example, you could allow a higher SKU count or weight shopper segments differently for different store clusters.

The default rules always apply to all store clusters, but any additional rules you create will override the defaults for their selected store clusters. You can use the **Comment** field to help you track rules you create. The **#** field shows the number of store clusters selected for the rule.

To create a new rule:

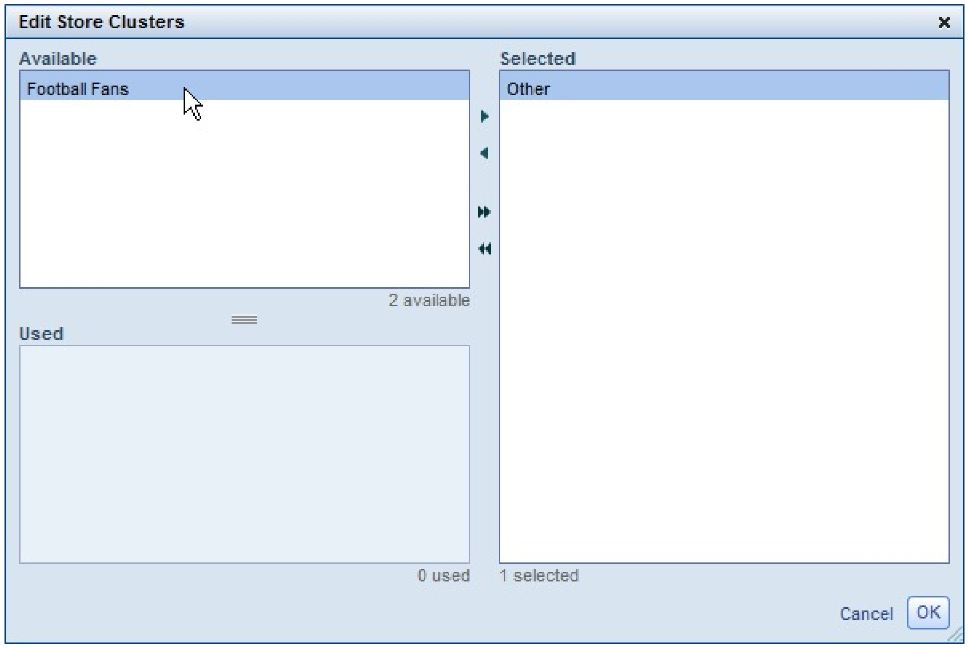
Procedure

1. Click **New** in the **Strategy**,**SKU Rules** or **Facing Rules** panel and select the type from the drop-down list if necessary.



2. Click the **Edit Store Cluster** icon.

3. In the dialog box, click and drag clusters between the **Available** and **Selected** lists. You can also use the arrows or double-click your selection. The **Used** field shows any store clusters selected for a different rule of the same type.



4. Click **OK**.
5. Change the rule settings. See “SKU Count Rule” on page 57 or “Facings Rule” for details.

Related Topics

“SKU Count Rule” on page 57

“Facings Rule”

Deleting Rules

Use this procedure to delete user-created rules.

To delete a rule, highlight the rule and click **Delete**. You cannot delete the default rules (system-created rules which apply to all store clusters), but can delete user-created rules. See “Rules” on page 50.

Related Topics

“Rules” on page 50

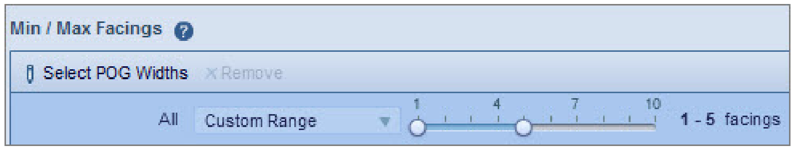
Facings Rule

The Facings rule allows you to maintain or set a range for the number of per-product facings on a planogram for all planogram widths.

About this task

The Facings rule allows you to maintain or set a range for the number of per-product facings on a planogram for all planogram widths.

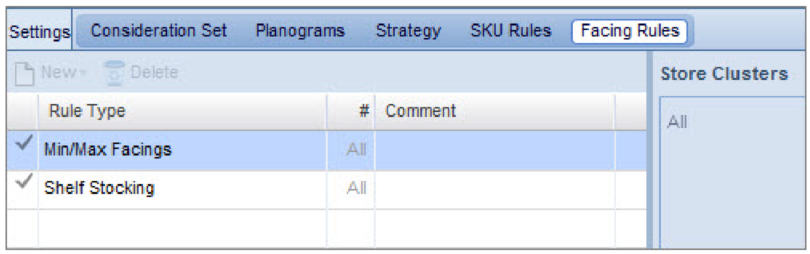
If you select **Min/Max Facings** under the **Rule Type** column, all **POG Widths** will be automatically selected, and you can then choose to either **Maintain** the existing range or set a **Custom Range** from the drop-down menu to apply to all POG Widths by default. If you select **Custom Range**, enter a minimum and maximum number of facings.



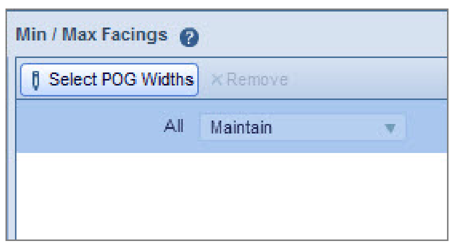
You can also individually select POG widths that you want to be exceptions to the Facings rule. To make one or more POG Widths an exception:

Procedure

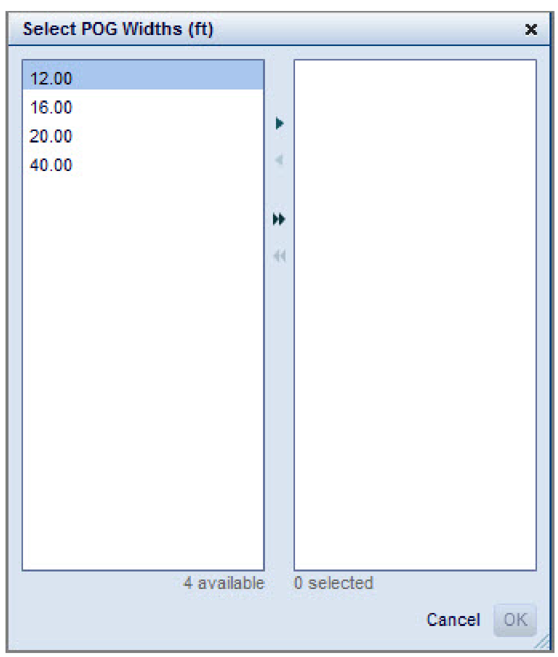
1. Under **Settings**, click on **Facings Rule**.
2. Click on **Min/Max Facings**.



3. On the right panel, click **Select POG Widths**.

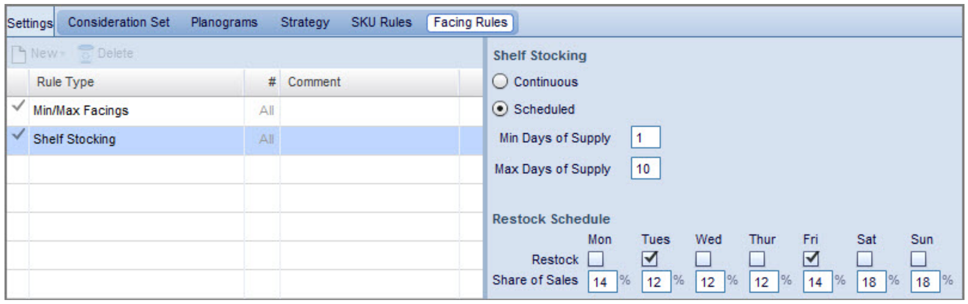


4. Select one or more POG Widths from the pop-up list.

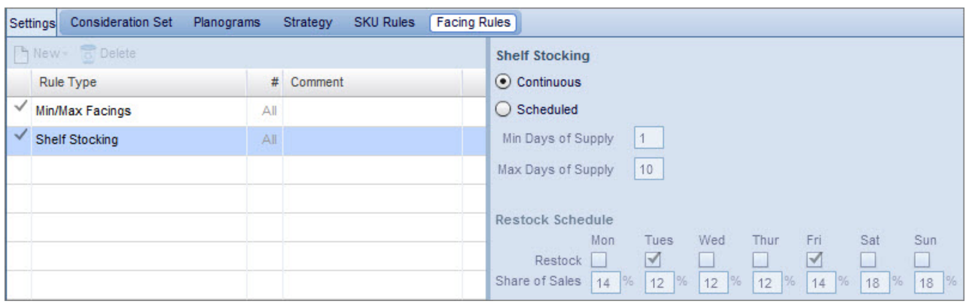


5. Click **OK**.

6. Set the min/max facings to use for the selected POG Width(s).
7. Select **Shelf Stocking** under the **Rule Type** column to set shelf stocking options. If you select **Scheduled**, you must enter the **Min Days of Supply**, the **Max Days of Supply**, and the **Restock Schedule**.



Select **Continuous** if you want the optimization to assume that your shelves will be continuously restocked as needed. The fields required for a scheduled restock will be greyed out, and optimization will no longer be affected by out of stock penalties.



Hurdle Rate Rule

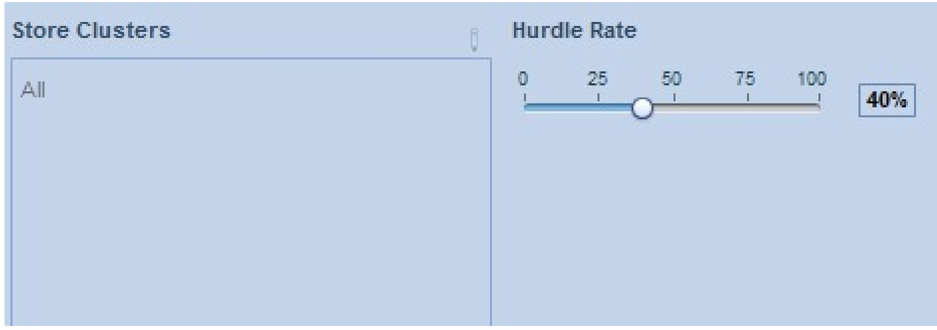
The Hurdle Rate rule is used to help minimize the amount of SKU churn in a scenario.

The Hurdle Rate rule is used to help minimize the amount of SKU churn in a scenario. You can set the hurdle rate to any percentage between 0 and 100. When you perform a SKU or facings optimization, Assortment Optimization scales back results for unstocked products (market and new) by the selected percentage. For the application to add these products to the assortment, they must preform better than existing products after the results are scaled back. "Better" is determined based on your Strategy rule selections.

For example, the Strategy rule sets the weight to 100% Incremental $ and the Hurdle Rate is 10%:

Product	**Incremental $**	**Adjusted Incremental $**
Assortment Product A	$10	$10
Market Product B	$10	$9 = *(10 - (10 * .1))*
Market Product C	$20	$18 = *(20 - (20 * .1))*

In this example, the application would add Market Product C to the assortment, but not Market Product B.

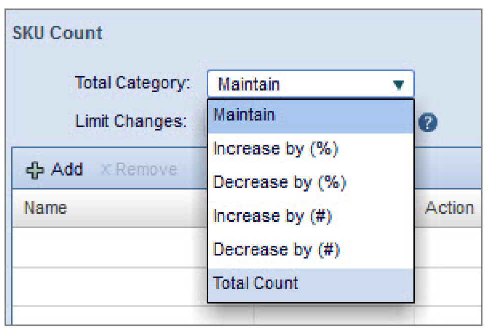


To set the Hurdle Rate rule, use the slide lever to select a specific percentage as the hurdle rate.

SKU Count Rule

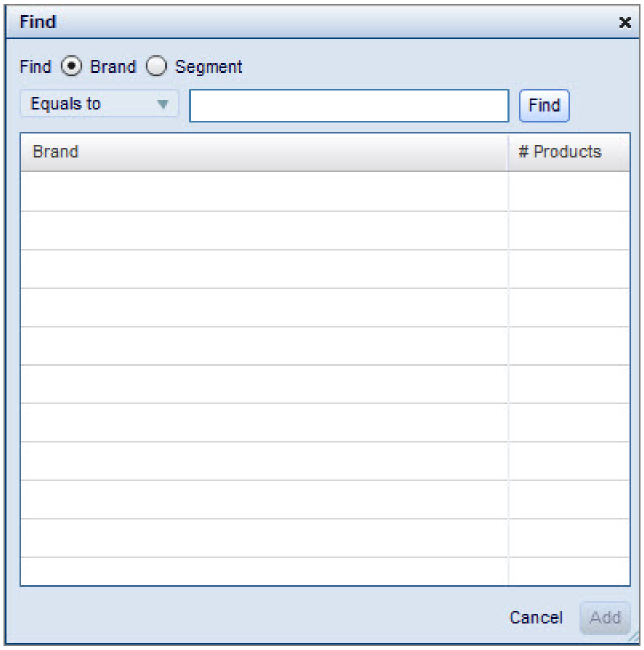
The SKU Count rule allows you to maintain, increase/decrease by a percentage/number, or set a maximum number of SKUs on a planogram, by planogram width.

The SKU Count rule allows you to maintain, increase/decrease by a percentage/number, or set a maximum number of SKUs on a planogram, by planogram width.



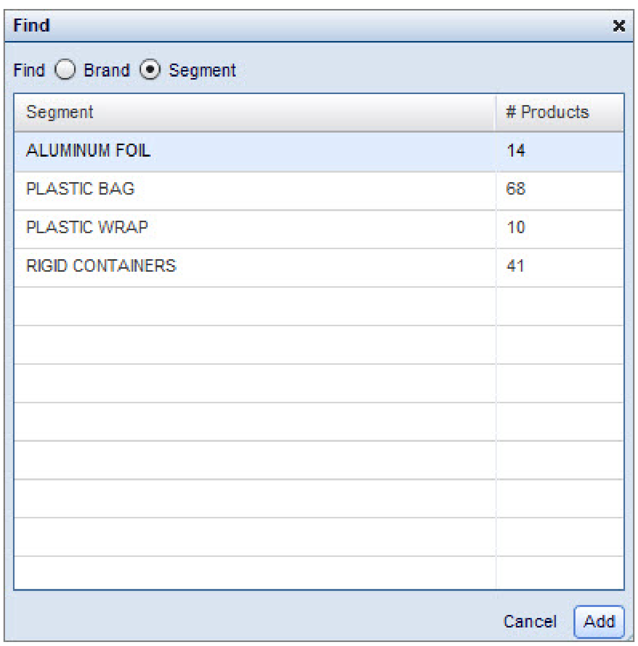
To set the SKU Count rule, select an action (**Maintain**, **Increase by (%)**, **Total Count**, etc.) from the **Total Category** drop-down list for each **POG Width**. For the increase/decrease actions, enter a number or percentage by which the SKU count will increase/decrease. For **Total Count**, enter a total SKU count value.

You can also add Brands or Segments to the SKU Count rule. To add a Brand, click the **Add** button. The **Find** pop-up window opens.



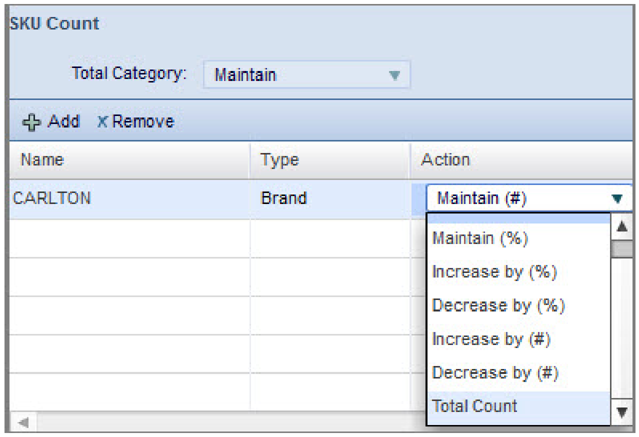
Select the **Brand** option. Use the search operators to find the specific Brand. Then click **Add**.

To add a Segment, select the **Segment** option. A list of available segments will generate.



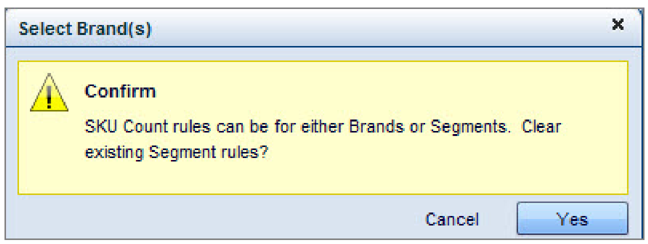
Select the desired Segment(s), then click **Add**.

Once you have added your Brands or Segments, you can use the drop-down menu to set individual actions for the highlighted Brand or Segment.

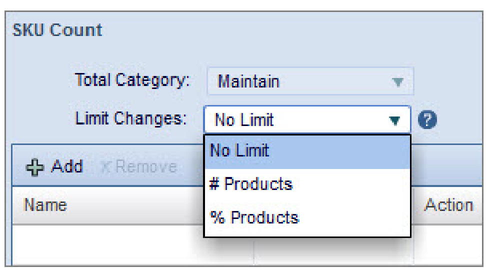


These are the same actions that are available at the category level in the **Total Category** drop-down menu. To remove a Brand or Segment, click **Remove**.

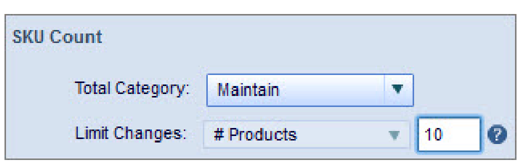
Note: You can only add Brands OR Segments, but not both. If you try to add both, you will receive an error message. In the below example, Segments had been added first.



The **Limit Changes** drop-down menu allows you to set a hard limit on the number of product changes that can be applied down to the store cluster and planogram level in the existing assortment.



Select **# Products** to set a limit on the number of products that can be changed, and select **% Products** to set a limit on a percentage of products that can be changed. If you select either of these options, a blank field will appear next to the **Limit Changes** drop-down menu.



Enter a number in the field. The maximum amount you can enter is 100.

Select **No Limit** if you do not want to set a limit on the amount of changes.

Shelf Stocking Rule

Shelf Stocking rule settings are used to estimate the potential out-of-stock for SKUs with changes to facings

Unlike other rules, you would not make incremental changes to the Shelf Stocking rule between scenarios in order to find improvements. Generally, the Shelf Stocking rule settings do not vary across scenarios. Shelf Stocking rule settings are used to estimate the potential out-of-stock for SKUs with changes to facings. Given that days of supply is calculated per SKU and per store cluster, the Shelf Stocking rule can determine how many facings are required to support the predicated sales rate.

Note: You cannot modify this rule at the store cluster level.

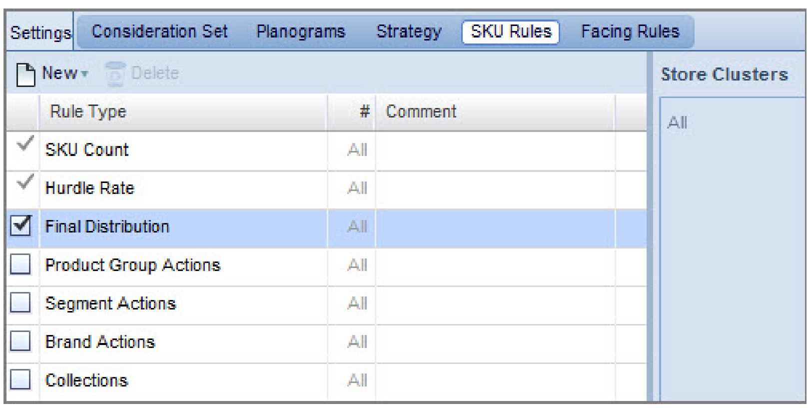
Related Topics

"Facings Rule" on page 54

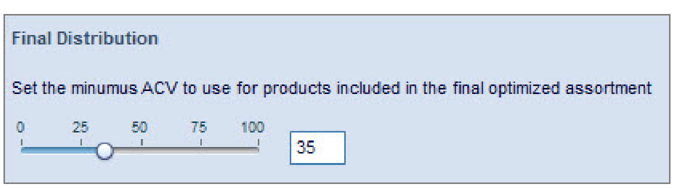
Final Distribution

The Final Distribution rule allows you to set a Minimum ACV value when scaling from Potentials to Actuals in optimized results.

The Final Distribution rule allows you to set a Minimum ACV value when scaling from Potentials to Actuals in optimized results. To use this functionality, navigate to **SKU Rules** under **Settings**, then select **Final Distribution**.



Use the slide lever to set a specific percentage for the minimum ACV to use for products included in the final optimized assortment, or enter a number in the blank field.



The slider position will match the number you enter.

Select the **Final Distribution** checkbox to include it in the scenario's optimization.

Note: This functionality is controlled via a system setting; talk to your system administrator for more details.

Collection Rule

The **Collection** rule entails that all products in the collection (a user-defined group of products) must either be In or Out of the final assortment.

The **Collection** rule entails that all products in the collection (a user-defined group of products) must either be In or Out of the final assortment. There cannot be a case where some products of a Collection are In and other products of the same Collection are Out.

Since it is possible for a Product to belong to more than one Product Group, you might create overlapping Collections.

In the event that there are overlapping Collections, for example, Collection A and Collection B have some products in common, Collection A is ranked above Collection B.

If there are no conflicts in actions, then all overlapping Collections will be enforced. For instance, Collection A and Collection B are both deemed by optimization as being In the final assortment.

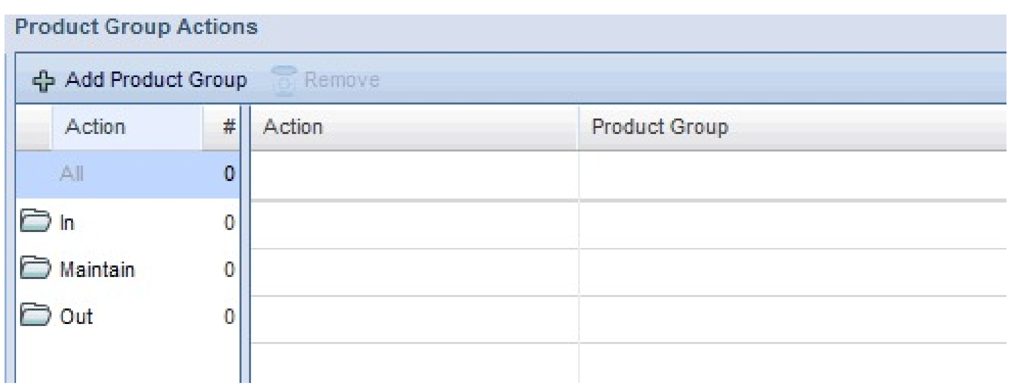
If there are conflicts in actions, then the lower ranking Collection will be dissolved. Collection A will be In and Collection B will be Out of the final assortment.

Product Group Actions

The Product Group Actions rule allows you to specify actions for selected product groups, such as whether you want a product group to be in the final Assortment, out of the final Assortment, or maintained as is.

About this task

The **Product Group Actions** rule allows you to specify actions for selected product groups. You can specify if you want a product group to be In the final Assortment, Out of the final Assortment, or if you want it to be maintained as is, in which case you would select the **Maintain** folder. To add a Product Group, select the desired action folder, then click **Add Product Group**. You can then search for available product groups in the pop-up window. You can also drag and drop product groups from one action folder to another. These selections predetermine the optimization's decision and override the **Minimum ACV** setting for these products.



Conflict Handling

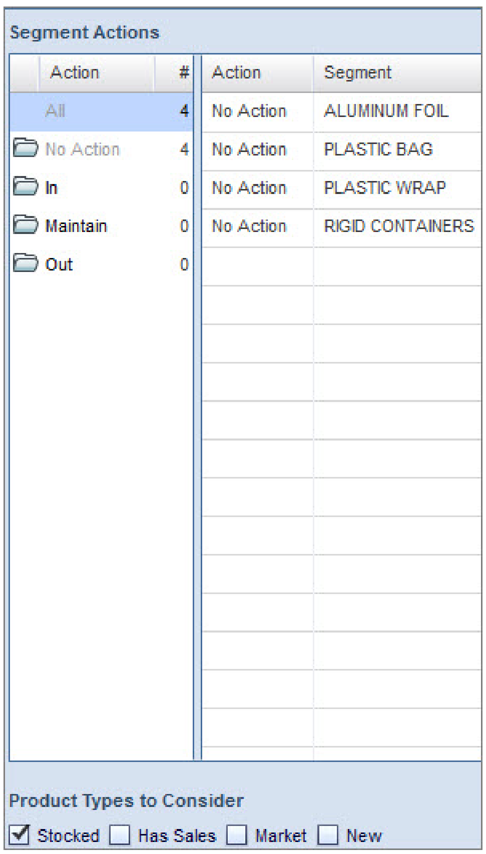
If you select two or more product groups containing overlapping products and select different behaviors for the product groups, Assortment Optimization uses the following hierarchy to determine which action is used for the behavior:

- Protect or add actions
- Delete or ignore actions

Segment Actions

The Segment Actions rule allows you to specify actions for selected segments, such as whether you want a segment to be in the final Assortment, out of the final Assortment, or maintained as is.

The **Segment Actions** rule allows you to specify actions for selected segments. Under the Action column, you can specify if you want a segment to be **In** the final Assortment, **Out** of the final Assortment, or maintained as is, in which case you would select the **Maintain** folder. All Segments are displayed when you select the **All** folder, and from there you can drag and drop segments into the appropriate action folders. The default selection is **No Action**. The different actions predetermine the optimization's decision and override the **Minimum ACV** setting for these segments.

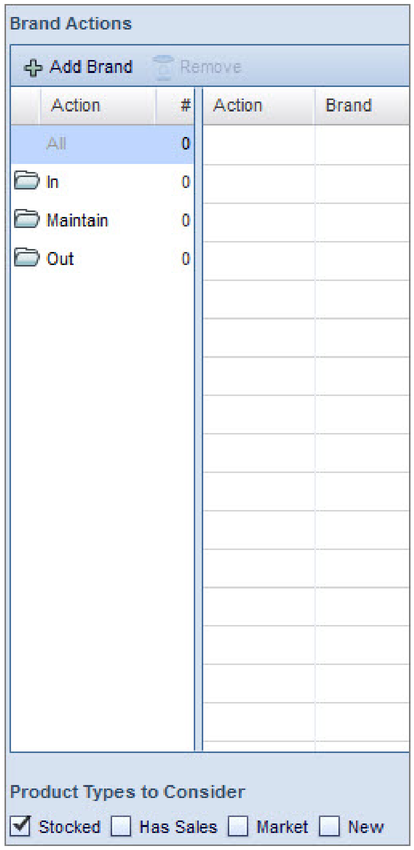


You can select which Product Type you would like to assign to the different actions by checking the box for **Stocked**, **Has Sales**, **Market**, or **New**.

Brand Actions

The Brand Actions rule allows you to specify actions for selected brands,such as whether you want a brand to be in the final Assortment, out of the final Assortment, or maintained as is.

The **Brand Actions** rule allows you to specify actions for selected brands. You can specify if you want a brand to be **In** the final Assortment, **Out** of the final Assortment, or maintained as is, in which case you would select the **Maintain** folder. To add a brand, select the desired action folder, then click **Add Brand** to select available brands from the pop-up window. You can also drag and drop brands from one action folder to another. The different actions predetermine the optimization's decision and override the **Minimum ACV** setting for these brands.



You can select which Product Type you would like to assign to the different actions by checking the box for **Stocked**, **Has Sales**, **Market**, or **New**.

Product Age

Recently introduced products that have not been in the stores long enough have low ACV and might not be considered in the optimization. You can protect these products using the Product Age rule.

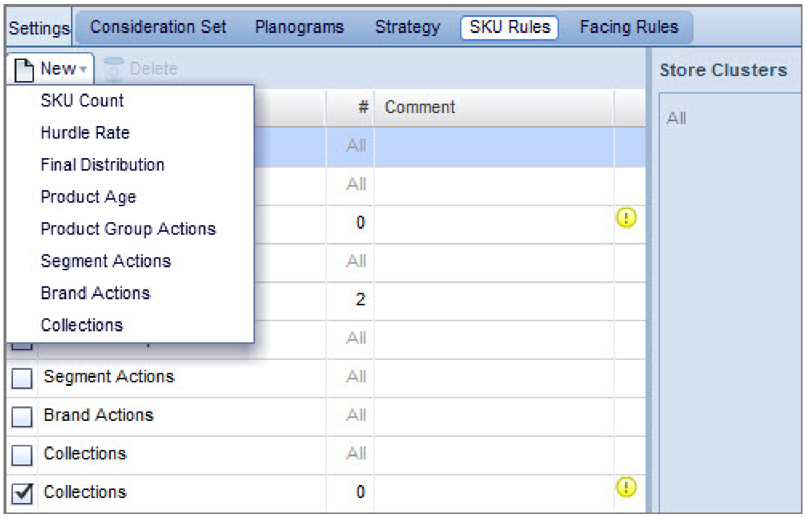
About this task

Recently introduced products that have not been in the stores long enough have low ACV and might not be considered in the optimization due to other rules you set. You can protect these products using the **Product Age** rule. This rule allows you to consider the length of time a product has been scanning at the cluster- or planogram-level to determine which products to retain.

To set the Product Age rule:

Procedure

1. Under **Settings**, navigate to the **SKU Rules** panel.
2. Click **New**. Select **Product Age** from the drop-down menu.



3. Use the **Product Age** slide bar to set an age threshold. You can also enter a number in the editable field. The slide bar will update accordingly.

The default value is 12 weeks, and the range goes from 0 to 52 weeks. Stocked products with an age less than the threshold will be retained in the final optimization results. Stocked products with an age greater than the threshold will have their optimization results determined by performance.

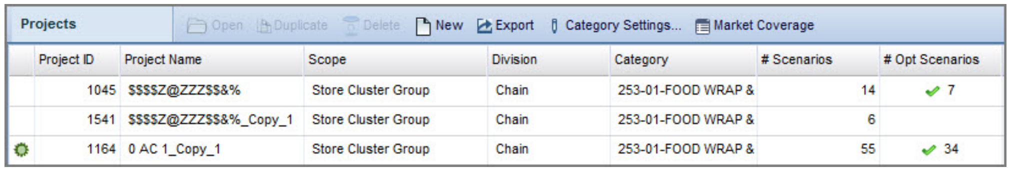
Note: The scope of **Product Age** is at the project-level, not across all TLog data.

Market Coverage

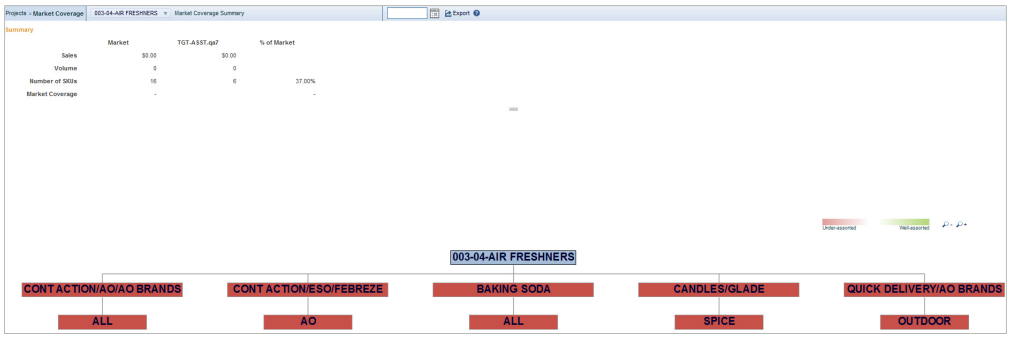
Market Coverage refers to the share of market sales of a product or product group.

Market Coverage refers to the share of market sales of a product or product group. The Market Coverage report shows how your assortment compares with the market by using 52 weeks of historical data, and displays results by segment, sub-segment, and brand.

To access this report, navigate to the **Projects** page header, then click **Market Coverage**. You can highlight a project from the **Projects** page to view the Market Coverage report for that specific project.

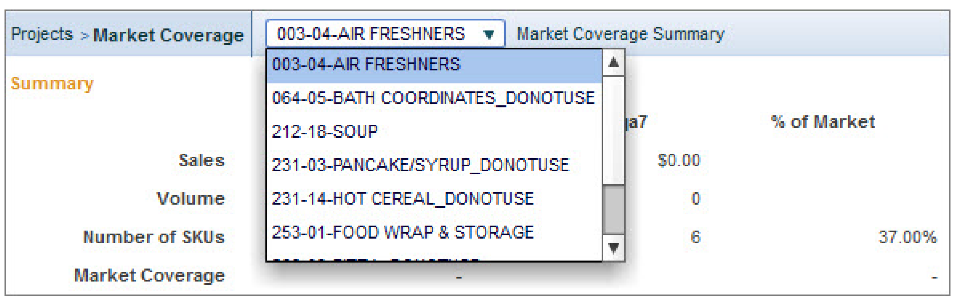


The **Market Coverage** report opens.



The **Summary** area displays the **Sales**, **Volume**, **Number of SKUs**, and **Market Coverage** for the market and retailer. The tree chart displays the summarized category and its segments and subsegments. A segment or subsegment will be displayed in red if it is under-assorted, and green if it is well assorted.

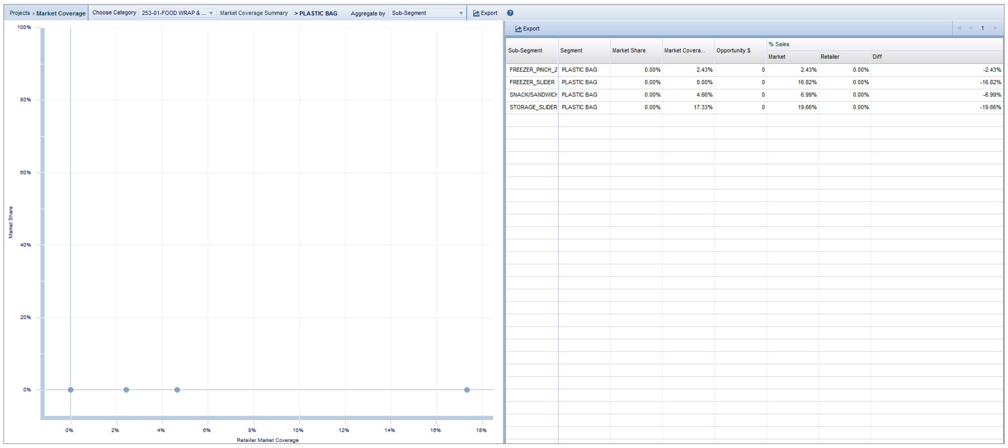
Use the category drop-down menu to change the category that the report is summarizing.



You can export the Market Coverage Summary, including the chart tree, by clicking **Export** at the top of the page.

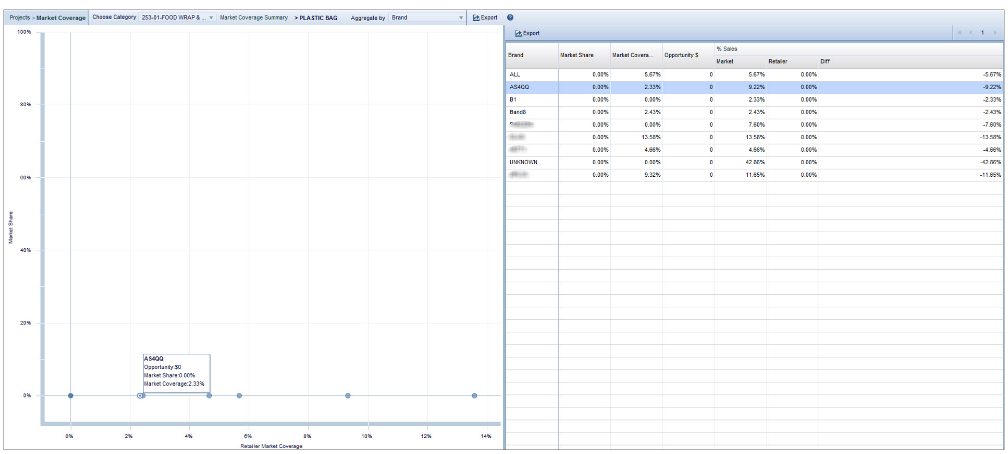
Click on a box in the chart tree. A new screen loads with a **Market Coverage** vs. **Market Share** graph on the left and an informational grid on the right displaying **Market Share**, **Market Coverage**, **Opportunity $**, and **% Sales**.

Note: For products that you currently carry, the Opportunity $ will be displayed as 0.



Select a category from the **Category** drop-down menu at the top of the page. Then use the **Aggregate** by drop-down menu to select which aggregation you would like to display.

Both the graph and the grid will update to reflect this aggregation. If you highlight a row in the grid, the point on the graph that represents the Segment, Sub-Segment, or Brand will be identified with a pop-over window.



Clicking on any of the points on the graph will open an informative pop-over window about that item.

Both the graph and the grid can be exported by clicking the **Export** option above them.

Managing Scenarios

From the Project Details page, you can create, optimize, modify, delete, approve for export, or duplicate a scenario or export scenario results. You can also view a scenario’s current status.

From the **Project Details** page, you can create, optimize, modify, delete, approve for export, or duplicate a scenario or export scenario results. You can also view a scenario’s current status.

You can complete this action...	On scenarios with this status...
Optimize	Any except Optimized
Edit	Any
Delete	Any
Duplicate	Any
Approve	Optimized
Export	Optimized

See the following topics.

"Scenario Status"

"Editing Scenarios" on page 69

"Deleting Scenarios" on page 70

"Duplicating Scenarios" on page 69

"Exporting Scenario Results" on page 71

Related Topics

"Scenario Status"
"Editing Scenarios" on page 69
"Deleting Scenarios" on page 70
"Duplicating Scenarios" on page 69
"Exporting Scenario Results" on page 71

Scenario Status

Scenario status is indicated by an icon in the Scenarios grid of the Project Details page. Hover your cursor over the icon to see the status explanation.

Scenario status is indicated by an icon in the **Scenarios** grid of the **Project Details** page. Hover your cursor over the icon to see the status explanation.

Icon	Status	Description
	Ready to be optimized	You have not yet optimized the scenario, but it contains all necessary details for optimization.
	Optimizing	Assortment Optimization is currently optimizing the scenario.
	Optimized	Assortment Optimization has finished optimizing the scenario.

Icon	Status	Description
	Optimized but with overrides	After optimization, you or another user added overrides. You can re-optimize this scenario to update the status to Optimized.
	Error	Assortment Optimization encountered an error during optimization.
	Approved for export	After optimization, you have marked a scenario for export.
	Exported	A scenario that was marked for approval for export has been exported.

Viewing the job status of scenarios

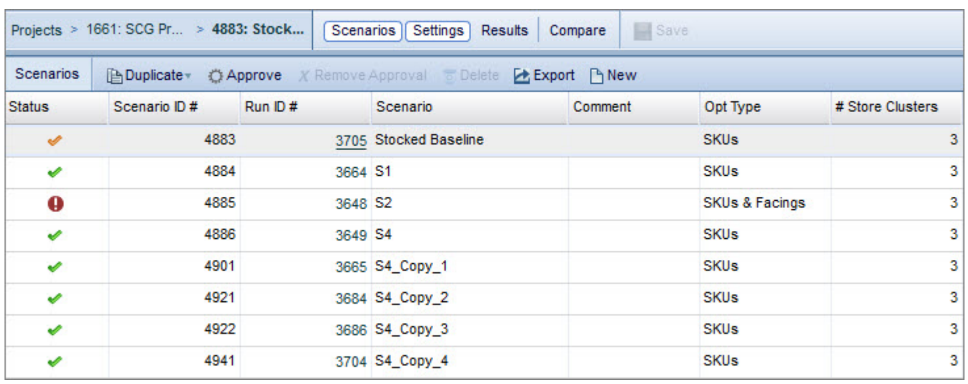
Use this procedure to view the job status of scenarios.

About this task

To view the job status of a scenario:

Procedure

1. From the **Project Details** page, navigate to the **Scenarios** tab.
2. Click the value under the **Run ID** column of the scenario you wish to check.

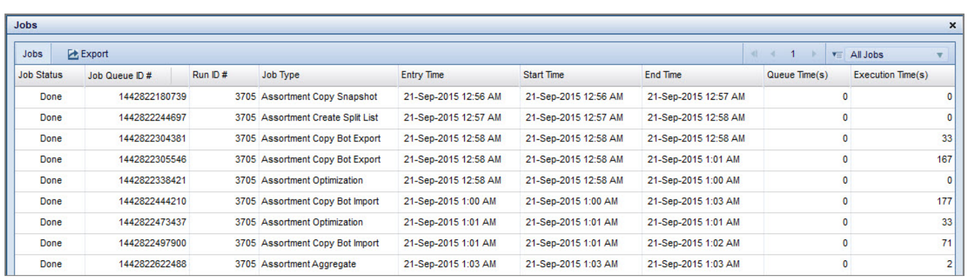


Projects > 1661: SCG Pr... > 4883: Stock... Scenarios Settings Results Compare Save

Scenarios Duplicate Approve Remove Approval Delete Export New

Status	Scenario ID #	Run ID #	Scenario	Comment	Opt Type	# Store Clusters
	4883	3705	Stocked Baseline		SKUs	3
	4884	3664	S1		SKUs	3
	4885	3648	S2		SKUs & Facings	3
	4886	3649	S4		SKUs	3
	4901	3665	S4_Copy_1		SKUs	3
	4921	3684	S4_Copy_2		SKUs	3
	4922	3686	S4_Copy_3		SKUs	3
	4941	3704	S4_Copy_4		SKUs	3

3. The **Jobs** pop-up window opens.



Jobs

Jobs Export 1 All Jobs

Job Status	Job Queue ID #	Run ID #	Job Type	Entry Time	Start Time	End Time	Queue Time(s)	Execution Time(s)
Done	1442822180739	3705	Assortment Copy Snapshot	21-Sep-2015 12:56 AM	21-Sep-2015 12:56 AM	21-Sep-2015 12:57 AM	0	0
Done	1442822244697	3705	Assortment Create Split List	21-Sep-2015 12:57 AM	21-Sep-2015 12:57 AM	21-Sep-2015 12:58 AM	0	0
Done	1442822304381	3705	Assortment Copy Bot Export	21-Sep-2015 12:58 AM	21-Sep-2015 12:58 AM	21-Sep-2015 12:58 AM	0	33
Done	1442822305546	3705	Assortment Copy Bot Export	21-Sep-2015 12:58 AM	21-Sep-2015 12:58 AM	21-Sep-2015 1:01 AM	0	167
Done	1442822338421	3705	Assortment Optimization	21-Sep-2015 12:58 AM	21-Sep-2015 12:58 AM	21-Sep-2015 1:00 AM	0	0
Done	1442822444210	3705	Assortment Copy Bot Import	21-Sep-2015 1:00 AM	21-Sep-2015 1:00 AM	21-Sep-2015 1:03 AM	0	177
Done	1442822473437	3705	Assortment Optimization	21-Sep-2015 1:01 AM	21-Sep-2015 1:01 AM	21-Sep-2015 1:01 AM	0	33
Done	1442822497900	3705	Assortment Copy Bot Import	21-Sep-2015 1:01 AM	21-Sep-2015 1:01 AM	21-Sep-2015 1:02 AM	0	71
Done	1442822622488	3705	Assortment Aggregate	21-Sep-2015 1:03 AM	21-Sep-2015 1:03 AM	21-Sep-2015 1:03 AM	0	2

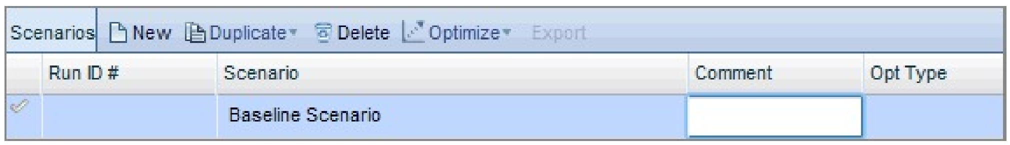
4. This displays information about all jobs related to the selected scenario. From here you can sort, filter, and export the data.

Editing Scenarios

When editing scenarios, only modifications to the consideration set and rules affect optimizations.

When editing scenarios, only modifications to the consideration set and rules affect optimizations. You cannot make these changes to scenarios in **Optimizing** status. Modifying **Optimized** scenarios will invalidate the existing results and change the status to **Optimized but with overrides**.

You can modify the **Scenario** (name) or **Comments** fields at any time from the **Scenarios** grid. These changes do not affect the optimizations. Double-click the field and enter the new value. The application saves your changes automatically.



Duplicating Scenarios

Use this procedure to duplicate existing scenarios.

About this task

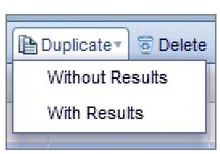
When creating multiple scenarios with minor modifications, you can save time by creating and duplicating a single scenario and then making changes to the duplicates.

You may also want to duplicate a scenario before overriding optimization results to see how your overrides change the scenario results. Assortment Optimization allows you to duplicate scenarios with or without the scenario results.

To duplicate a scenario:

Procedure

1. From the **Project Details** page, select the original scenario and click **Duplicate**.
2. Select **With Results** or **Without Results** from the drop-down menu. **With Results** is only available for optimized scenarios.



3. In the dialog box, change the **Scenario Name** if needed. Click **OK**.
4. The new scenario appears in the **Project Details** page in **Ready to Optimize** status.

About Duplicating With or Without Results

Duplicating a scenario will be different depending on whether the scenario has results or does not have results.

When duplicating without results, IBM Omni-Channel Merchandising copies only the scenario settings. The new scenario will be in **Ready to be optimized** status.

When duplicating a scenario with results, IBM Omni-Channel Merchandising copies the scenario's latest run results, settings and override actions. The new scenario has the same status as the original.

Deleting Scenarios

Use this scenario to delete a scenario

About this task

To delete a scenario:

Procedure

1. From the **Project Details** page, select the scenario.
2. Click **Delete**.
3. Click **OK** in the dialog box to confirm.

Approve for Export

You can mark a scenario as approved for export, which means that when you schedule an export using the Task Scheduler, all scenarios marked for approval will be exported.

About this task

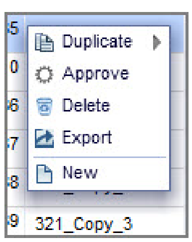
You can mark a scenario as approved for export, which means that when you schedule an export using the **Task Scheduler**, all scenarios marked for approval will be exported.

Note: Only optimized scenarios can be approved for export.

To approve optimized scenarios for export:

Procedure

1. From the **Project Details** page, select an optimized scenario.
2. Right-click the scenario and select**Approve**.

   You can also click the **Approve** option on the **Scenarios** menu bar.

3. The scenario that has been marked for approval will now have the following green icon displayed next to it on the **Projects** and **Project Details** pages.

4. After the scenario that has been marked for export has been exported, the following green icon will be displayed next to it on the **Projects** and **Project Details** pages.

Related tasks:
"Creating new tasks" on page 129

Exporting Scenario Results

Use this procedure to export results for an optimized scenario

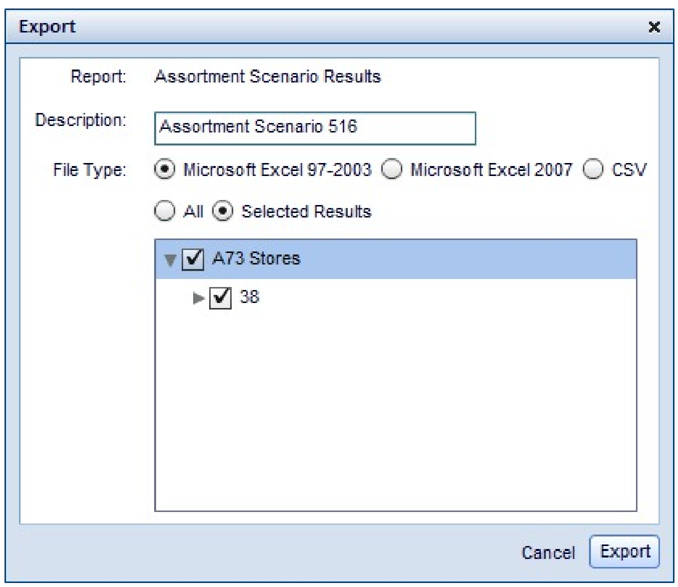
About this task

When you export scenario results, the exported file contains the lowest level of results: product/store cluster level for SKU optimization and product/store cluster/planogram level for facings optimization. The export contains the same fields as the **Detailed Results**. By default, the export includes all results for the scenario, but you can choose to limit the results exported.

To export results for an optimized scenario:

Procedure

1. From the **Project Details** page, select an optimized scenario.
2. Click **Export**. A dialog box opens.



3. Enter a **Description** to help you identify the file in the **Export Status** dialog.
4. Select a **File Type**. Assortment Optimization can export results as Microsoft Excel 97-2003, Microsoft Excel 2007 or CSV files.
5. If needed, use the checkboxes to set specific results to export. The expandable hierarchy is the same as in the **Detailed Results**.
6. Click **Export**. The **Export Status** dialog opens automatically. Locate your export and click the file name link to download the file.

Chapter 4. Optimization

You can optimize for a list of products to carry or for the number of facings that should be allotted to each product.

You can optimize for a list of products to carry or for the number of facings that should be allotted to each product. When you optimize for facings, it is common to use the Assortment Optimization recommendations as a starting point for modifications within your planogram software.

Optimization Modeling

Assortment Optimization uses data provided by your company to create models, which calculate item incrementality, estimate transferable demand effects across products, and scale market items to category sales.

Assortment Optimization uses data provided by your company to create models, which calculate item incrementality, estimate transferable demand effects across products, and scale market items to category sales. When you optimize, the software uses the consideration set and rules you specify, along with the model, to determine the best assortment choices.

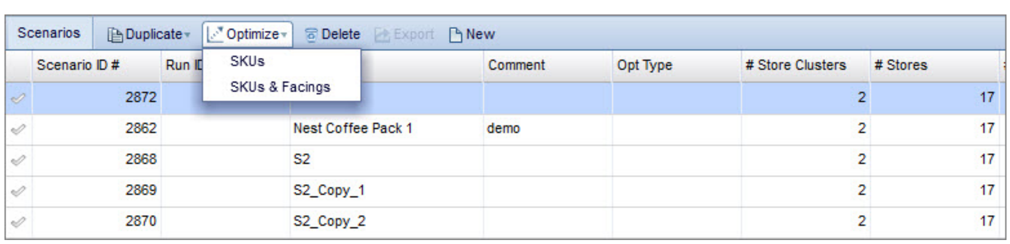
Optimizing Scenarios

Assortment Optimization can optimize scenarios for SKUs or facings.

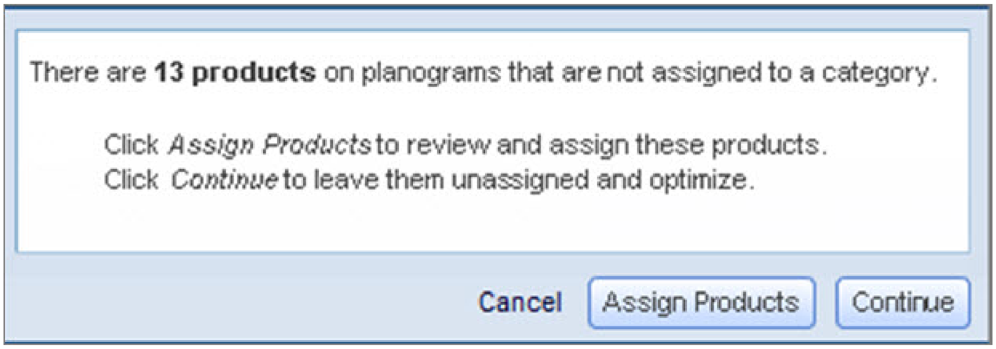
Assortment Optimization can optimize for SKUs or facings. SKU optimization returns a list of SKUs to carry for the selected store cluster(s). Facings optimization suggests the number of facings allotted to each SKU in the planogram(s). Planograms are not required for SKU optimization scenarios, but are required for Facings optimization scenarios.

After you configure the rules and consideration set for a scenario, you can optimize. If you want to optimize for SKUs and facings, optimize for SKUs first.

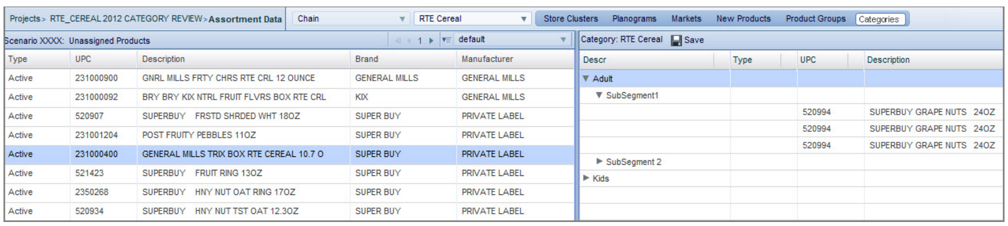
To optimize, select the scenario in the **Scenarios** grid and click the **Optimize** icon. Select **SKU** or **SKU & Facings** from the drop-down list.



If at least one product in a scenario is not assigned to a category, an error message will appear when you attempt to optimize it.

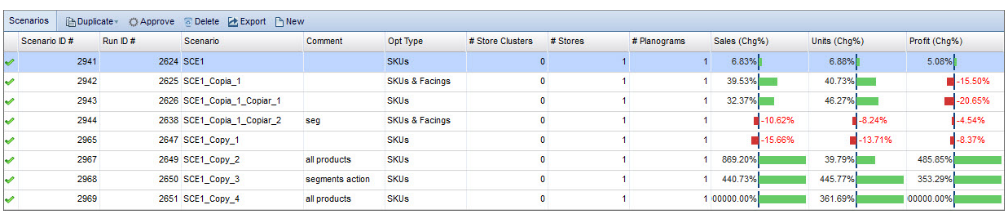


Selecting **Cancel** will cancel optimization of the scenario, selecting **Continue** will leave these products unassigned and optimize the scenario, and selecting **Assign Products** will allow you to assign the unassigned products to a category by opening the **Categories** tab in the **Assortment Data** area:

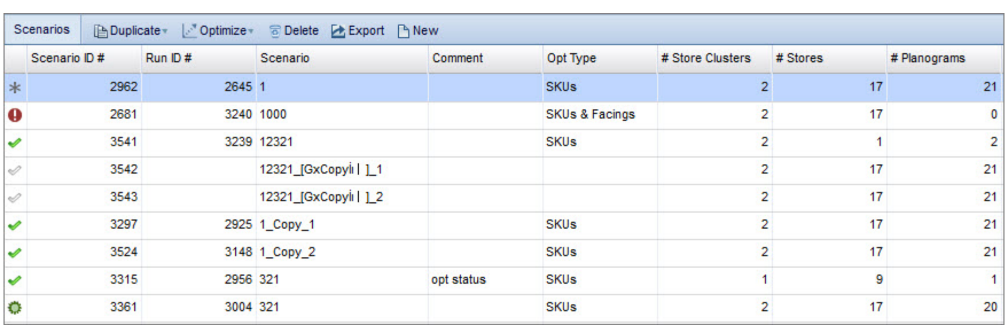


The left pane lists all unassigned products within a scenario, while the right pane lists all products assigned to the category, aggregated by segment and sub-segment. You can then drag and drop products from the left pane into sub-segments in the right pane. Then click **Save**. Once a product has been assigned, it will no longer trigger the error message for future scenarios.

A scenario that has successfully optimized will appear in the **Scenarios** grid with a green checkmark next to it.



If a scenario has not optimized successfully, a red exclamation point icon will be displayed next to it in the **Scenarios** grid.

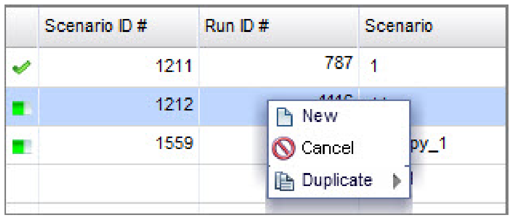


When optimization has successfully completed, the **Results** panel opens, and the reports become available for that scenario. A notification will also be sent to your inbox upon successful optimization.

Canceling an Optimizing Scenario

Canceling an optimizing scenario is useful when preparing for or recovering from a system outage.

Canceling an optimizing scenario is useful when preparing for or recovering from a system outage. You can cancel an optimizing scenario by selecting a scenario in the **Scenarios** grid that has a status of optimizing (the green progress bar) and right-clicking it.



Select **Cancel** from the context menu. Once the scenario has been cancelled, it will appear in the **Scenarios** grid with a slashed red circle icon next to it.

Analyzing Optimization Results

You can analyze Optimization results in the form of various reports.

You can open the **Results** panel in the **Project Details** page using the menu bar. When **Results** is underlined, the panel is open. You may want to close other panels so that more of the screen is available for this panel.

The **Results** panel displays the following reports:

- "Summary Report" on page 85
- "Detailed Results Report" on page 76
- "Column Chart Report" on page 80
- "Segmentation Chart" on page 83
- "Store Change" on page 88
- "Pivot Table Report" on page 86

Related Topics

"Detailed Results Report" on page 76

"Column Chart Report" on page 80

"Summary Report" on page 85

"Segmentation Chart" on page 83

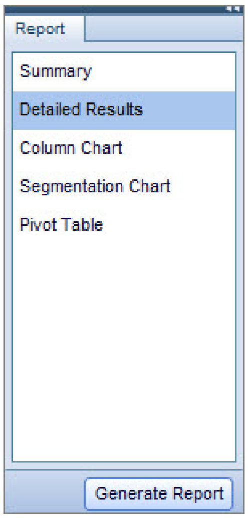
"Store Change" on page 88

"Pivot Table Report" on page 86

Detailed Results Report

The Detailed Results report displays scenario results in a grid format. An expandable hierarchy allows you to view results within the scenario by store cluster, planogram width, planogram number, and planogram name.

To view this report, select **Detailed Results** from the **Report** tab and click **Generate Report**.

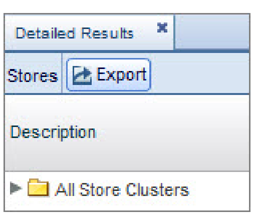


The **Detailed Results** report displays scenario results in a grid format. An expandable hierarchy allows you to view results within the scenario by store cluster, planogram width, planogram number, and planogram name.

Select a results row from the **Stores** grid to open product-level results in the **Products** grid. You can view the results through various aggregations in the drop-down menu in the Products grid:

- **Segment**: Shows an expandable hierarchy of results for each **Segment**, **Sub-Segment** and individual **Product**.
- **Brand**: Shows an expandable hierarchy of results for each **Brand** and individual **Product**.
- **Product**: Shows a flat list of product results by individual product.

You can export the Detailed Results report by clicking **Export**:



Sales, Units, Profits, and Full Impact

You can choose four “views” or ready-made reports that are available for the Product, Segment, and Brand aggregations

About this task

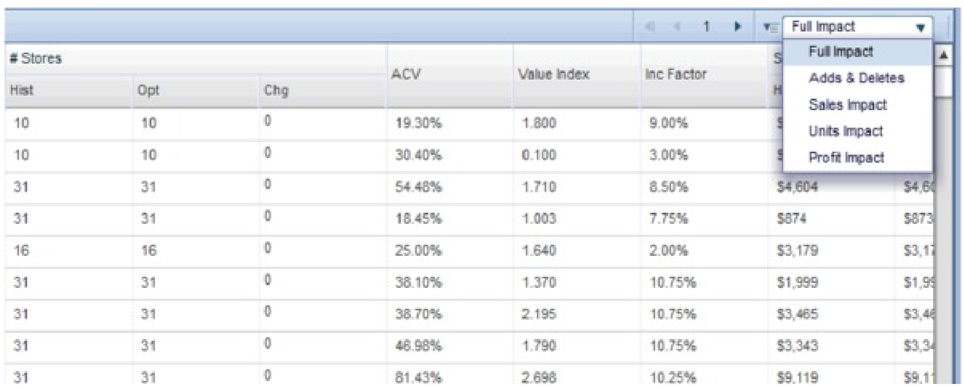
You can choose four "views" or ready-made reports that are available for the Product, Segment, and Brand aggregations:

- **Full Impact**
- **Sales Impact**
- **Units Impact**
- **Profit Impact**

To view any of these reports:

Procedure

1. Generate the **Detailed Results** report.
2. Click the **All Store Clusters** folder from the **Stores** grid, which opens the **Products** grid.
3. From the Products grid, open the drag and drop view menu on the right of the grid and select either **Full Impact**, **Sales Impact**, **Units Impact**, or **Profit Impact**.



Hist	Opt	Chg	ACV	Value Index	Inc Factor	S
10	10	0	19.30%	1.800	9.00%	$
10	10	0	30.40%	0.100	3.00%	$
31	31	0	54.48%	1.710	8.50%	$4,604
31	31	0	18.45%	1.003	7.75%	$874
16	16	0	25.00%	1.640	2.00%	$3,179
31	31	0	38.10%	1.370	10.75%	$1,999
31	31	0	38.70%	2.195	10.75%	$3,465
31	31	0	46.98%	1.790	10.75%	$3,343
31	31	0	81.43%	2.698	10.25%	$9,119

Adds & Deletes

Adds & Deletes is another view or ready-made report that is a subsection of the Detailed Results report.

Adds & Deletes is another view or ready-made report that is a subsection of the Detailed Results report. It provides a quick filter for products that have been added, deleted, or retained by either you or the Optimization. To access this view, click on the view drop-down menu in the **Products** grid and select the **Adds & Deletes** option.

This view has three new columns in the Products grid for the Segment and Brand aggregations:

- **Added**: The number of products that have been Added by you or the Optimization.
- **Deleted**: The number of products that have been Deleted by you or the Optimization
- **Retained**: The number of products that have been Protected by you or Retained by the Optimization.

Exporting the Detailed Results Report

Use this procedure to export the Detailed Results report for offline viewing in Excel or CSV format.

About this task

You can export the Detailed Results report for offline viewing in Excel or CSV format.

To export the Detailed Results report:

Procedure

1. Generate the **Detailed Results** report.
2. Click the **Export** button.
3. When the pop-up appears, type in a description for the file, select what file-type you would like the report to be saved as (either Microsoft Excel 97-2003, Excel 2007, or CSV format).
4. Select what aggregation you would like the report to drill down to.
5. Click **OK**.

Product Types in Optimized Scenarios

These values are the product types shown in the Product Type field in the Detailed Results report

These values are the product types shown in the **Product Type** field in the **Detailed Results** report. When viewing products in **Assortment Data**, the application uses different product types. See "Product Types in Assortment Data" on page 35 for details.

- **Stocked**: A product from your IBM Omni-Channel Merchandising product file which currently belongs to at least one planogram within the scenario's scope and which had sales during the modeling period.
- **Market**: A product currently sold by competitors, but not carried on any of your company's planograms. You can view these products in **Assortment Data** > **Markets**.
- **Market Has Sales**: A market product that has sales on another store cluster.
- **New**: A newly-introduced product from the manufacturer. You can view these products in **Assortment Data** > **New Products**.
- **Other Distribution**: An **Active** or **Discontinued** product which belongs to at least one of your company's planograms, but not to a planogram within the scenario's scope.
- **Has Sales**: A product from your IBM Omni-Channel Merchandising product file which is not carried on any of your company's planograms, but did have sales during the modeling period.
- **Stocked No Sales**: A product from your IBM Omni-Channel Merchandising product file which currently belongs to at least one planogram within the scenario's scope and which did not have sales during the modeling period.

Note: You can configure the product types to include when calculating historical metrics in optimization results via a system setting. The two options are: **Stocked**, which includes actuals for **Stocked with Sales** products and averages for **Stocked No Sales** products only, and **Sales**, which includes actuals for **Stocked with Sales** and **Has Sales** products only. Talk to your System Administrator for more details.

Product Actions

You can view each product's selected action from the **Products** grid in **Detailed Results**. Product actions are represented by icons.

You can view each product's selected action from the **Products** grid in **Detailed Results**. The **Opt Action** field shows the action recommended by the optimization. The **Override** field shows user-selected override actions.

Product actions are represented by icons. Hover over the icons to see explanations.

Icon	Product Action	Description
	Added by Optimization	Optimization added the product to the assortment.
	Deleted by Optimization	Optimization deleted the product from the assortment.
	Retained by Optimization	Optimization made no change to the product.
	Added by User	Optimization added the product to the assortment as a result of a user-defined product action. This action is available as an override.
	Deleted by User	Optimization deleted the product from the assortment as a result of a user-defined product action. This action is available as an override.
	Protected by User	Products are protected in those store clusters and POGs where they are currently stocked.
	Ignored by User	Remove the product from the assortment during the next optimization. This action is available as an override.

Product Action Overrides

Use this procedure to override a scenario optimization's product actions

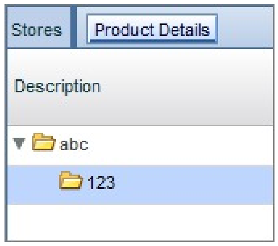
About this task

In some situations, you may want to override the optimization's recommended action for specific products. You can only enter overrides at the product-individual planogram level. After entering an override, you can re-optimize to adjust the assortment in order to incorporate your override actions and re-forecast the financial impact of the overrides.

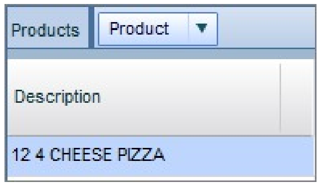
To override a scenario optimization's product actions:

Procedure

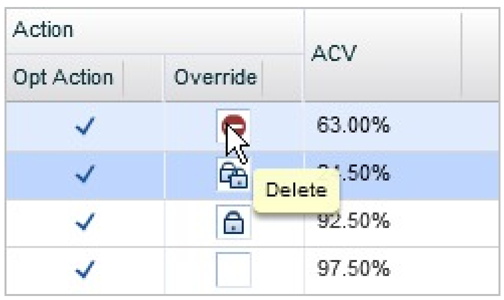
1. In the **Stores** grid, expand the folders and select the correct planogram. Click **Product Details** to open the **Products** grid.



2. In the **Products** grid, select the **Product** view from the drop-down list.



3. Click in the **Override** field to scroll through the available product actions. If the field is blank, no override is selected. See "Product Actions" on page 78 for explanations.



4. Click **Save** to retain your override selections.
5. Click **Optimize** to re-optimize the scenario with override selections.

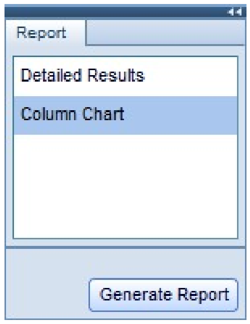
   Related Topics

   "Product Actions" on page 78

Column Chart Report

The Column Chart report displays Historical and Optimized scenario results in a bar graph format. This format allows you to compare results across manufacturer, brand, segment and sub-segment.

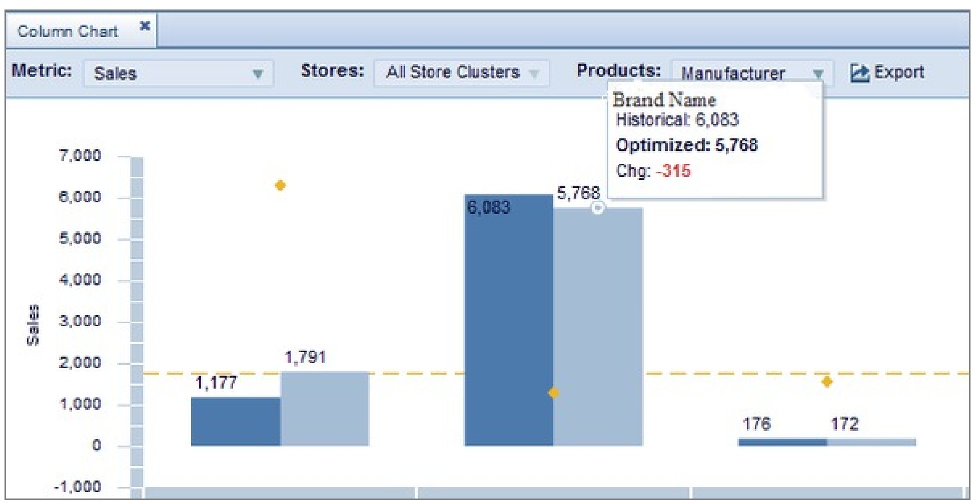
To view this report, select **Column Chart** from the **Report** panel and click **Generate Report**.



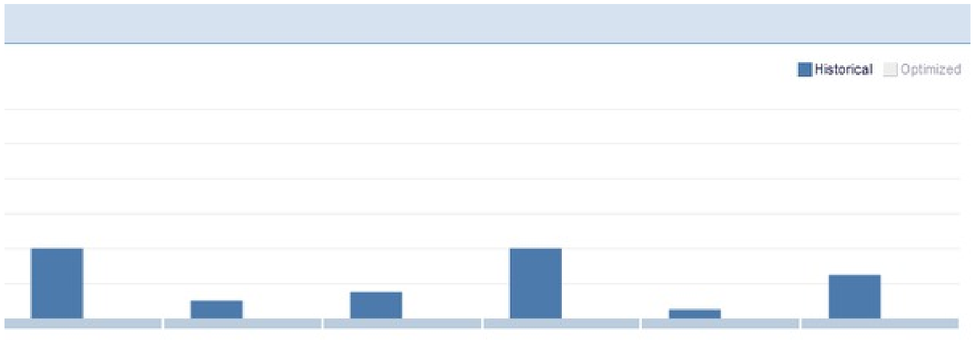
The **Column Chart** report displays Historical and Optimized scenario results in a bar graph format. This format allows you to compare results across manufacturer, brand, segment and sub-segment. The report's drop-down menus allow you to customize the report view:

- **Metric**: Select the results metric (**#SKUs**, **#Stores**, Sales, Sales Potential, Units, Units Potential, Profit, **Profit Potential, or** Actions) to compare. The Actions option enables you to chart the number of products that are Added, Deleted, Protected, or Ignored.
- **Stores**: Select a specific store cluster to view or select **Total** to view all results.
- **Products**: Select the axis (**Manufacturer**, **Brand**, **Segment** or **Sub-Segment**) to use for comparison.

To view the exact values for a specific bar, hover your cursor over the bar.



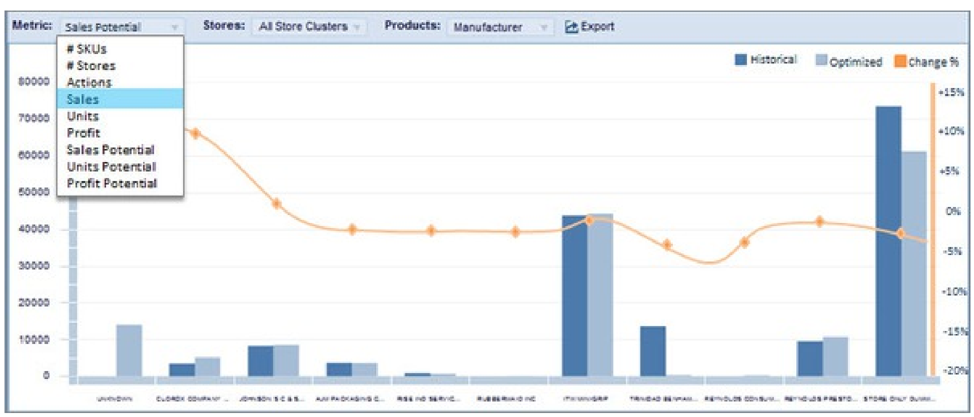
The default setting for the Column Chart report is to display both historical and optimized scenario results in side by side columns. However, if you wish to see only one of those results, clicking the box next to Historical or Optimized fields in the key located in the right-hand corner of the graph deselects that particular result, and its corresponding column will not be displayed in the report. Clicking the deselected box again will bring back the corresponding column.



Change% Scenario Results

When you select Sales, Sales Potential, Units, Units Potential, Profit, or Profit Potential as your results metric in the Column Chart report, Change% is displayed as a line chart.

When you select Sales, Sales Potential, Units, Units Potential, Profit, or Profit Potential as your results metric, in addition to Historical and Optimized scenario results, Change% is displayed on a line chart plotted on a secondary axis, with a zero line.



You can hover your mouse over points on the line chart to view the exact values.

Exporting the Column Chart report

Use this procedure to export the Column Chart report in PDF format.

About this task

You can export the Column Chart report in PDF format.

To export the Column Chart report:

Procedure

1. Click the **Export** option within the report.
2. When the dialogue box opens, click the **All** option if you wish to export all of the report, or click the **Pages** option and fill in the numbers of the pages you want to include in the blank form fields.
3. Select the **Include Page Numbers** checkbox if you wish to display page numbers in the report.

Segmentation Chart

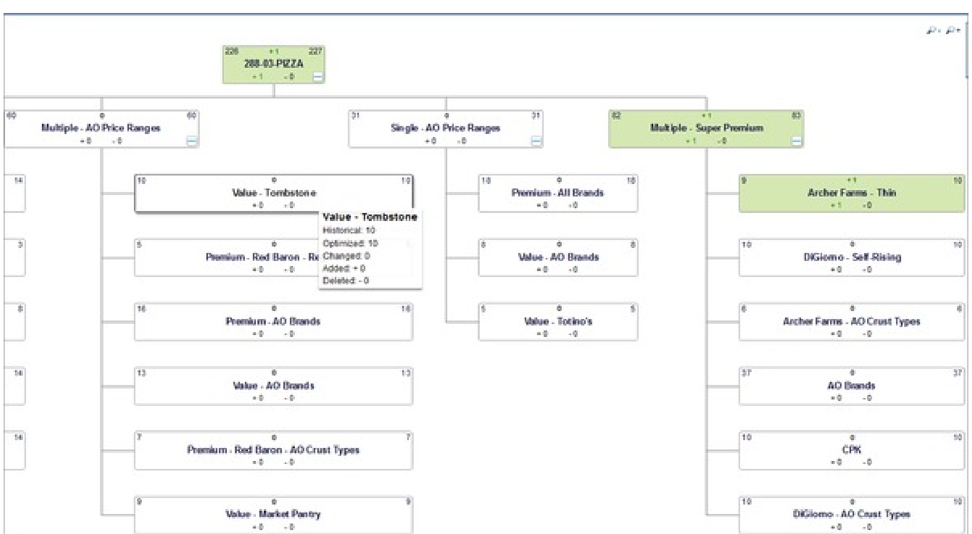
The Segmentation Chart report allows you to assess optimization opportunities by displaying the SKU count of Category, Segment, and Subsegment aggregations in a hierarchical org chart structure.

To view this report, select **Segmentation Chart** from the **Report** panel and click **Generate Report.**

The Segmentation Chart report allows you to assess optimization opportunities by displaying the SKU count of Category, Segment, and Subsegment aggregations in a hierarchical org chart structure. Each node in the chart displays:

- Historical SKU count
- Optimized SKU count
- SKU Change
- SKUs Added
- SKUs Deleted
- No Change in SKU count

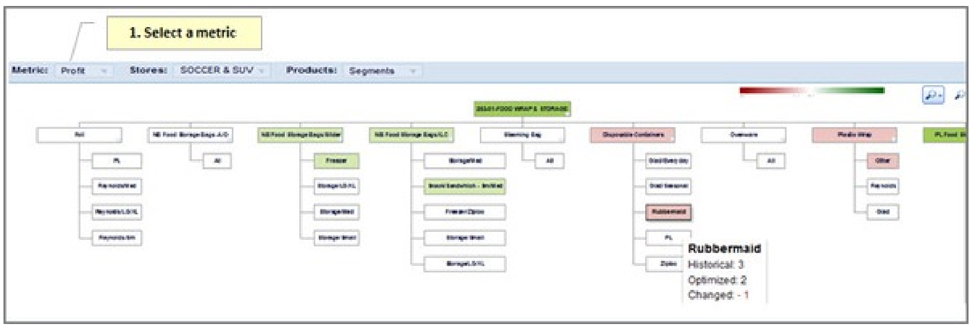
To view this information, you can either hover your mouse over any node or zoom in on the chart.



The color of the node indicates the net change in SKU count. Red indicates a decline in SKU count, and green indicates an increase in SKU count. The darker the shade of red or green, the greater the change in SKU count.

You can select 7 different metrics for the Segmentation Chart report:
- Sales
- Units
- Profit
- Sales Potential
- Units Potential
- Profit Potential
- SKU

To choose any of these metrics, navigate to the **Metric** drop-down menu.



Exporting the Segmentation Chart

Use this procedure to export the Segmentation Chart report for offline viewing.

About this task

You can export the Segmentation Chart report for offline viewing.

To export the Segmentation Chart report:

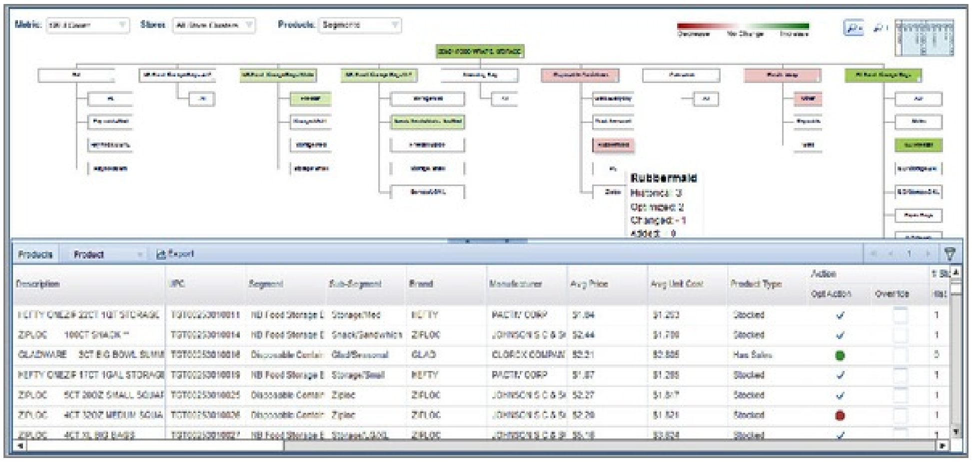
Procedure

1. Generate the **Segmentation Chart** report.
2. Click the **Export** button.
3. When the browser pop-up appears, type in a description for the file, select what file-type you would like the report to be saved as. The file can be exported in a visual file format such as a .png or .jpg file.
4. Select the file location for the report to be saved in.
5. Click **Save**

Product Details

If you double click on a node of the Segmentation Chart, the Product Details for that node will open in a new panel.

If you double click on a node, the Product Details for that node will open in a new panel. This information is comparable to the Detailed Results report. However, unlike the Detailed Results report, the Product Details panel is only available in one view, the **Default** view. This is the same as the Full Impact view in the Detailed Results report.



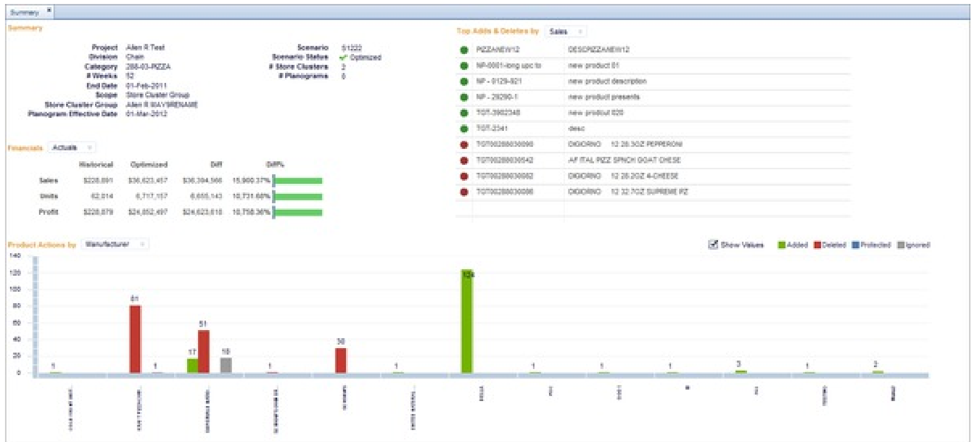
Summary Report

The Summary report displays various information about an optimized scenario in dashboard format.

To view this report, select **Summary** from the **Report** panel and click **Generate Report.**

The Summary report displays various information about an optimized scenario in dashboard format. It contains four different areas:

- **Summary**: Displays basic information about the scenario. For scenarios that have not been optimized yet, such as editable and errored out scenarios, this will be the only information available in the report.
- **Financials**: Displays the Sales, Units, and Profit of Historical and Optimized data, and the Change and Change%. You can view the data as Potentials or Actuals by selecting either option from the dropdown menu.
- **Top Adds and Deletes**: Displays the top products that optimization recommends be added or deleted. The products recommended for adding have a green circle next to them, while the products recommended for deletion have a red circle next to them. You can display the products by Sales, Units, Profit, Sales Potential, Units Potential, or Profit Potential by opening the drop-down menu.
- **Product Actions**: Displays the products that optimization recommends be Added, Deleted, Protected, or Ignored, in bar graph format. You can view the products by Manufacturer, Brand, Segment, or Sub-segment by opening the drop-down menu. Clicking the box next to a product category will hide its corresponding bar on the graph. You can also hide the numerical values on the graph by deselecting the **Show Values** box.



Exporting the Summary Report

Use this procedure to export the Summary report for offline viewing.

About this task

You can export the Summary report for offline viewing.

To export the Summary report:

Procedure

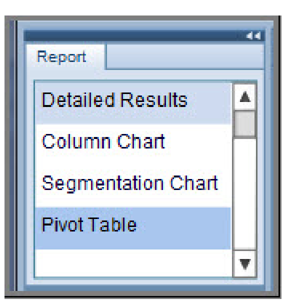
1. Generate the **Summary** report.
2. Click the **Export** button.
3. When the browser pop-up appears, select what file-type you would like the report to be saved as. The file can be exported in a visual file format such as a .png or .jpg file.
4. Select the file location for the report to be saved in.
5. Click **Save**

Pivot Table Report

The Pivot Table is a flexible, customizable report that allows you to select categories and metrics to create your own spreadsheet report.

About this task

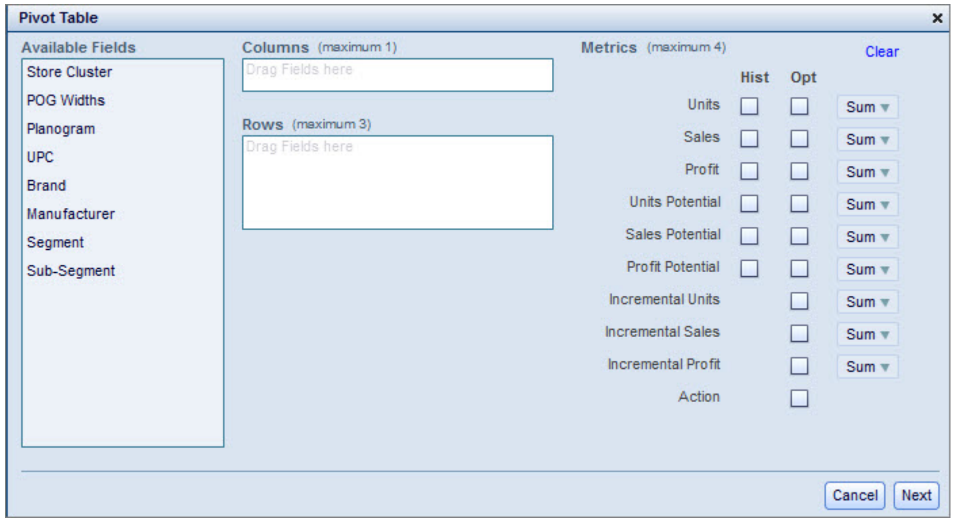
The **Pivot Table** is a flexible, customizable report that allows you to select categories and metrics to create your own spreadsheet report. To view this report, navigate to the **Results** area, select **Pivot Table** from the **Report** tab and click **Generate Report**.



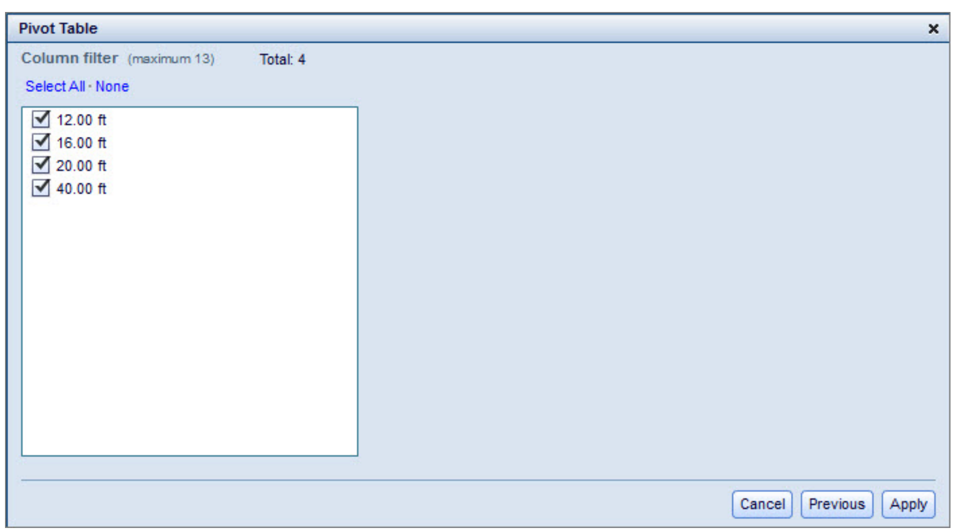
The **Pivot Table** pop-up window opens. You will build the Pivot Table report from this window. To build the Pivot Table report:

Procedure

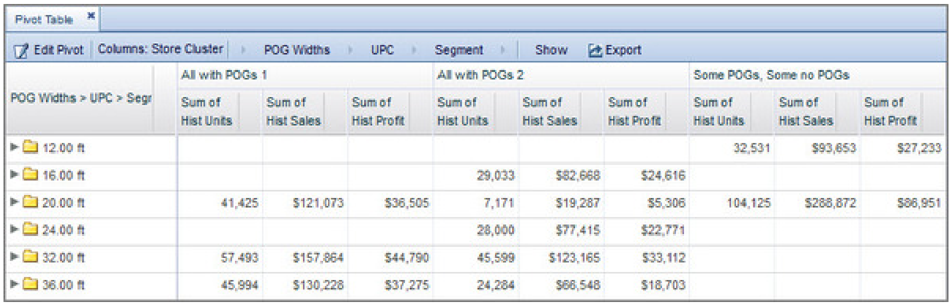
1. Select a category from the **Available Fields** box. Drag and drop the category into the **Columns** or **Rows** field.



2. Select the metrics you would like the report to contain by checking the boxes in the **Metrics** area. Checking a box in the **Hist.** column will use Historical data while checking a box under the **Opt.** column will use Optimized data.
3. Select if you want to use the **Sum**, **Avg** (Average), **Min** (Minimum), or **Max** (Maximum) from the drop-down menu. The default is **Sum**.
4. Click **Next**.
5. You will be prompted to select which columns you would like to include based on your selections from the previous screen. Depending on the number of metrics and row fields selected, the application will set a maximum limit on how many column values you can select. Select the check-boxes next to the column values you would like to include.

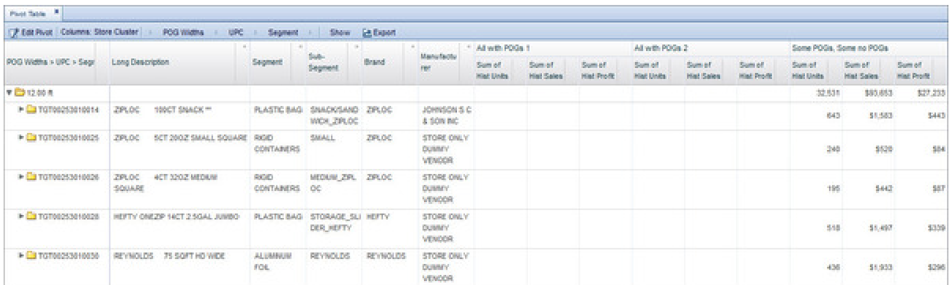


6. Click **Apply**. The Pivot Table report will be generated with the metrics you selected. The below example used **Store Cluster** for the column, **POG Widths**, **UPC**, and **Segment** for the rows, and **Units**, **Sales**, and **Profit** for the metrics.

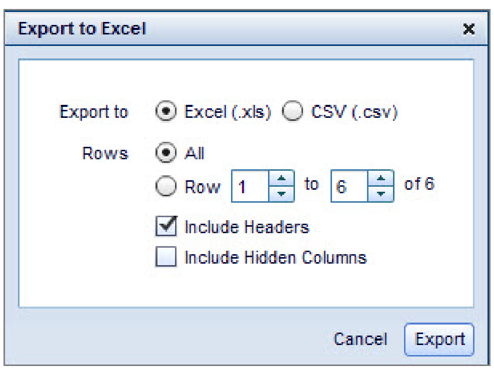


POG Widths > UPC > Segr	All with POGs 1 Sum of Hist Units	Sum of Hist Sales	Sum of Hist Profit	All with POGs 2 Sum of Hist Units	Sum of Hist Sales	Sum of Hist Profit	Some POGs, Some no POGs Sum of Hist Units	Sum of Hist Sales	Sum of Hist Profit
12.00 ft							32,531	$93,653	$27,233
16.00 ft				29,033	$82,668	$24,616			
20.00 ft	41,425	$121,073	$36,505	7,171	$19,287	$5,306	104,125	$288,872	$86,951
24.00 ft				28,000	$77,415	$22,771			
32.00 ft	57,493	$157,864	$44,790	45,599	$123,165	$33,112			
36.00 ft	45,994	$130,228	$37,275	24,284	$66,548	$18,703			

7. To go back and change any of the metrics, click **Edit Pivot**.
8. You can expand the column values by clicking on the folders. The **Long Description** column will be added, as well as the **Segment**, **Sub-Segment**, **Brand**, and **Manufacturer** in this example.



9. To collapse the expanded columns, click the folder at the top of the hierarchy.
10. You can export the Pivot Table report by clicking **Export**. The Export dialogue box opens.

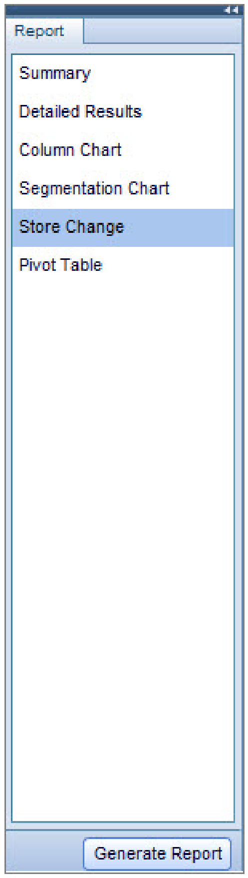


11. You can select Excel or CSV as your export format. You can also choose to export all rows by selecting the **All** option, or a selection of rows by selecting the **Row** option and entering the appropriate Row numbers in the fields. Use the check-boxes to include headers or hidden columns.
12. Click **Export**.

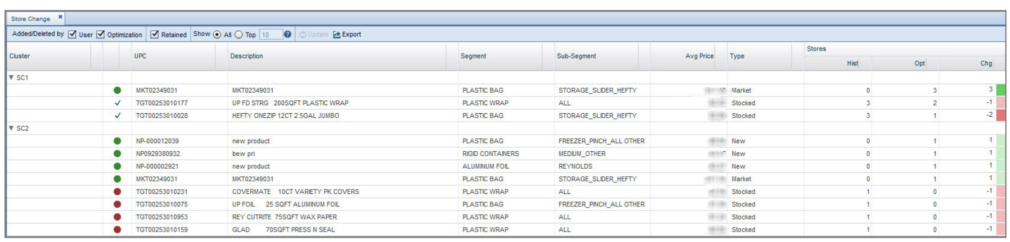
Store Change

The Store Change report displays store count changes by store cluster and product.

To view this report, select a scenario from the **Scenarios** tab, then select **Store Change** from the **Report** tab. Click **Generate Report**.



The **Store Change** report opens.



This report displays store count changes by store cluster and product. You can filter the results to include only products that you have added or deleted via rules by selecting the **User** checkbox. You can also filter the results by products that the optimization has added or deleted by selecting the **Optimization** checkbox. To remove products added or deleted by you or the optimization from view, deselect either of these check boxes, then click **Update**. If you want to display all products that have been added or deleted, select the **All** option. To display products that have been retained by you or optimization, select the **Retained** checkbox and the **User** and/or **Optimization** checkbox.

Note: Retained products will not be displayed in the report if the **Retained** checkbox is deselected.

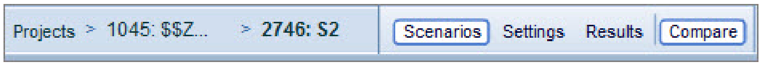
Select the **Top** option and enter a number in the field to display only the top products added or deleted by store count change. The maximum number you can input is 100. You can sort the data by different metrics by clicking any of the column headers.

Compare Scenarios

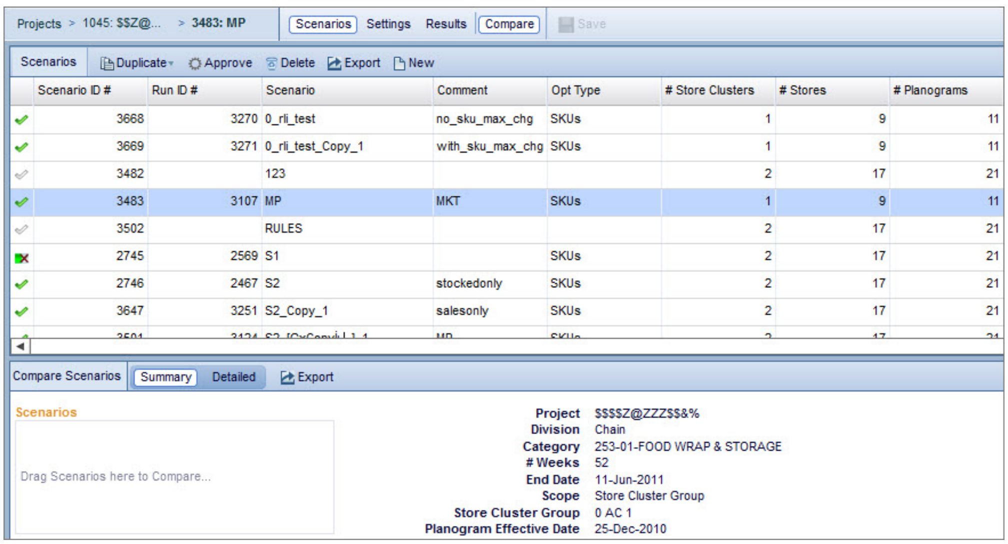
The Compare option allows you to compare various metrics of up to four scenarios.

The **Compare** option allows you to compare various metrics of up to four scenarios.

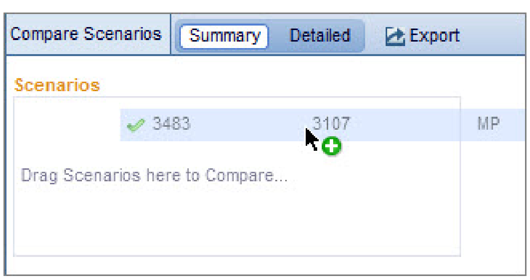
To access it, click the **Compare** tab in the Project Details navigation bar. Then, click the **Scenarios** tab.



You should now have both the **Compare** and **Scenario** panels open. To begin comparing scenarios, drag and drop scenarios from the **Scenarios** grid into the Scenarios field in the **Compare Scenarios** grid.



If a green plus sign appears when you hover the scenario you are dragging over the Scenarios box, the scenario is applicable for comparison. If a red X appears, the scenario is not applicable for comparison. Scenarios that have been optimized should be applicable.

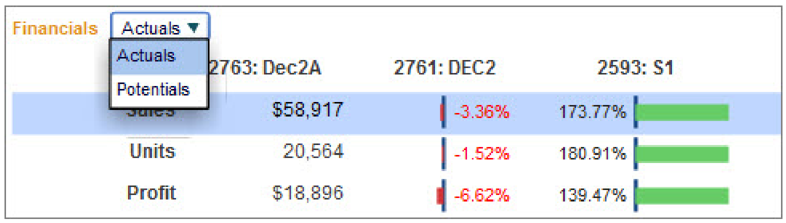


Once the scenarios have been successfully dropped into the Scenarios box, the report will be generated.

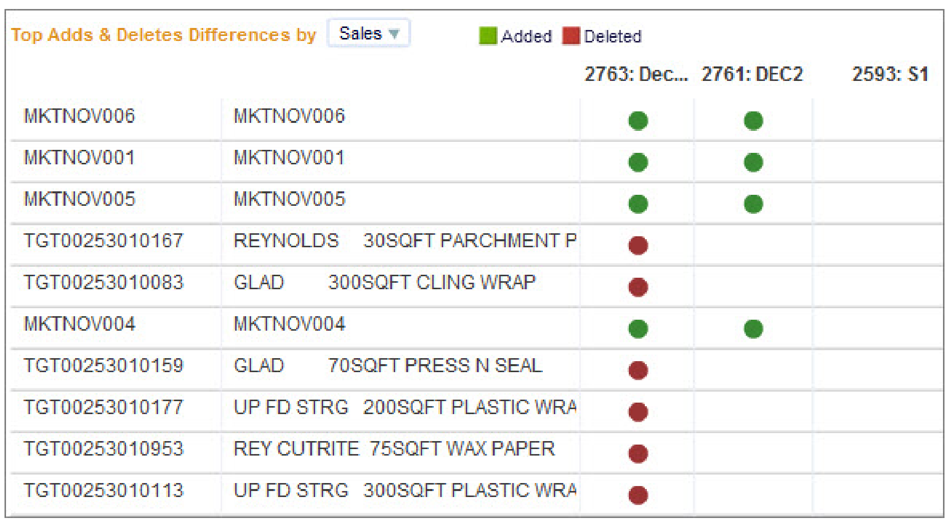
The Compare report's **Summary** area compares various information about up to four optimized scenarios in dashboard format. It contains five different areas:

- **Scenarios** box: Once you drag and drop scenarios, this area lists the scenarios that are being compared. To reorder the scenarios, click and drag them. The other report areas will update accordingly. To remove a scenario individually from the Scenarios box, drag the scenario back into the **Scenarios** grid. To remove all scenarios, click the icon with the two blue X's.

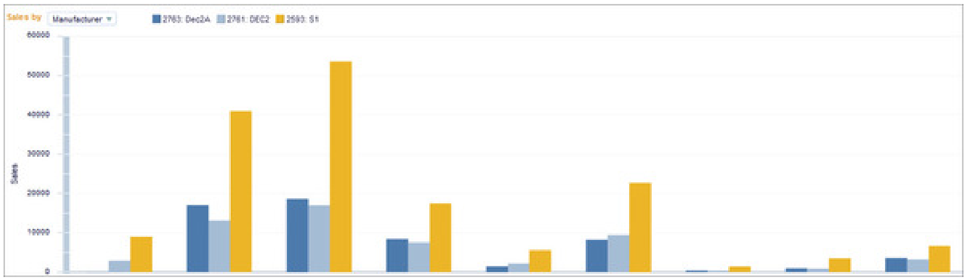
- **Summary**: Displays basic information about the scenarios. For scenarios that have not been optimized yet, such as editable and errored out scenarios, this will be the only information available in the report.
- **Financials**: Compares the Sales, Units, and Profit across scenarios. You can view the data as **Potentials** or **Actuals** by selecting either option from the dropdown menu. Added and Deleted may also be displayed if applicable. Positive values will appear green and negative red. Hovering over values will display the exact value of the percentage difference.



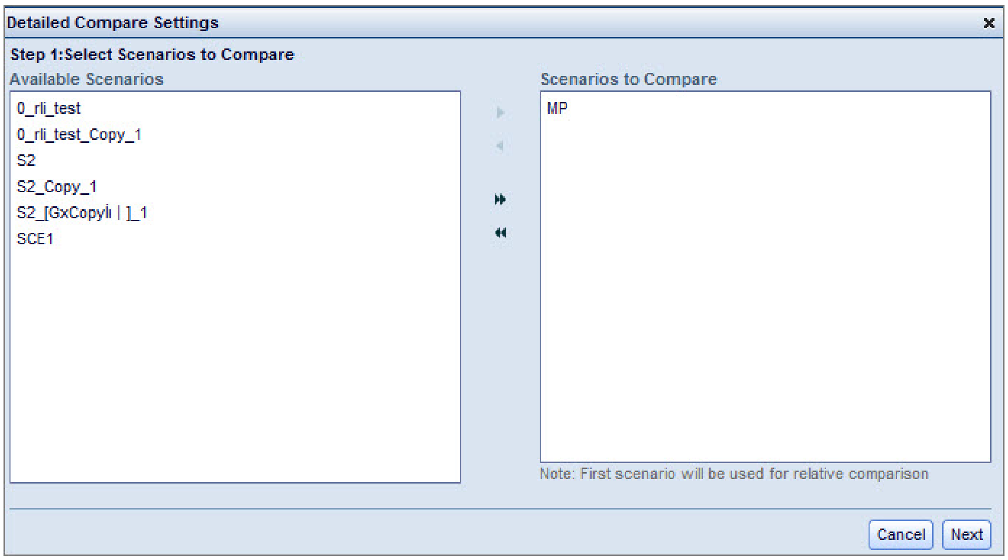
- **Top Adds and Deletes Differences**: Displays the top 10 products and the recommended product actions for each scenario. The products recommended for adding have a green circle next to them, while the products recommended for deletion have a red circle next to them. You can display the products by Sales, Units, Profit, Sales Potential, Units Potential, or Profit Potential by using the drop-down menu. Clicking the box next to Added or Deleted will hide its corresponding product actions on the chart.



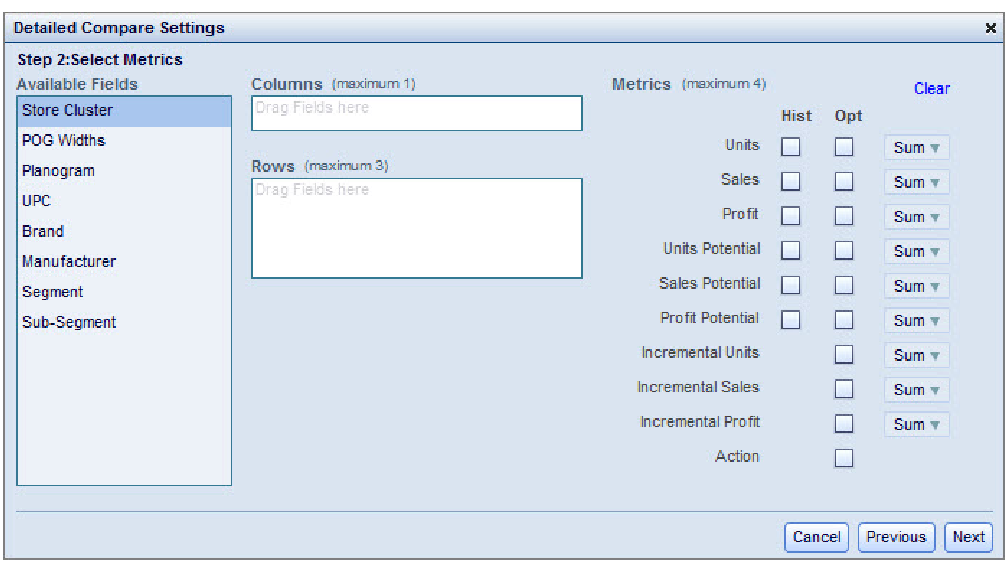
- **Bar Graph**: Displays a single financial metric across scenarios at different levels of aggregation, depending on the metrics you selected in the Financials and Top Adds and Deletes Differences sections. You can view the products by Manufacturer, Brand, Segment, or Sub-segment by opening the drop-down menu. Clicking the box next to a scenario name will hide its corresponding bar on the graph.



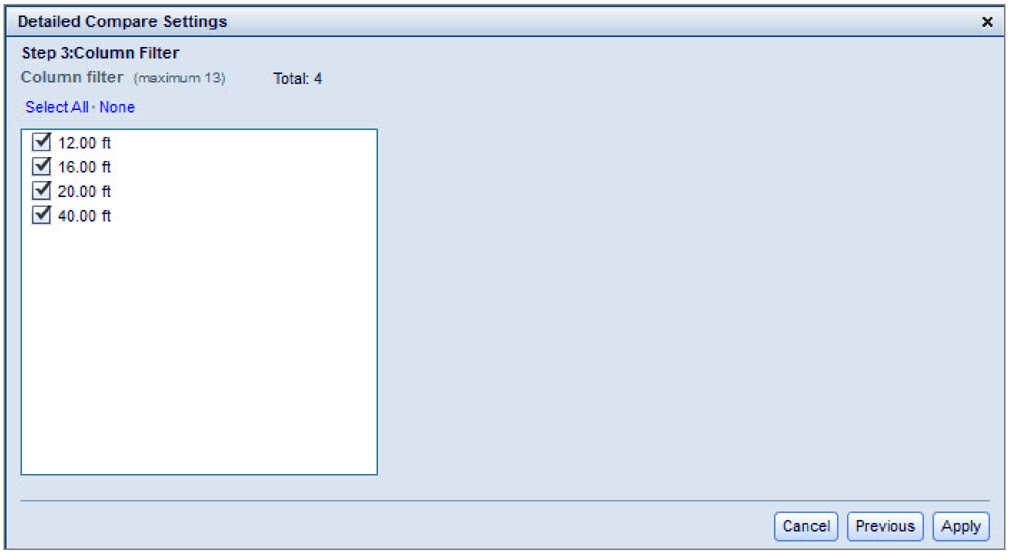
The Compare report's **Detailed** area functions much like the Pivot Table report, only you can compare the pivot table metrics between two scenarios instead of only analyzing one scenario. If you select the **Detailed** tab, Step 1 of the **Detailed Compare Settings** pop-up window opens.



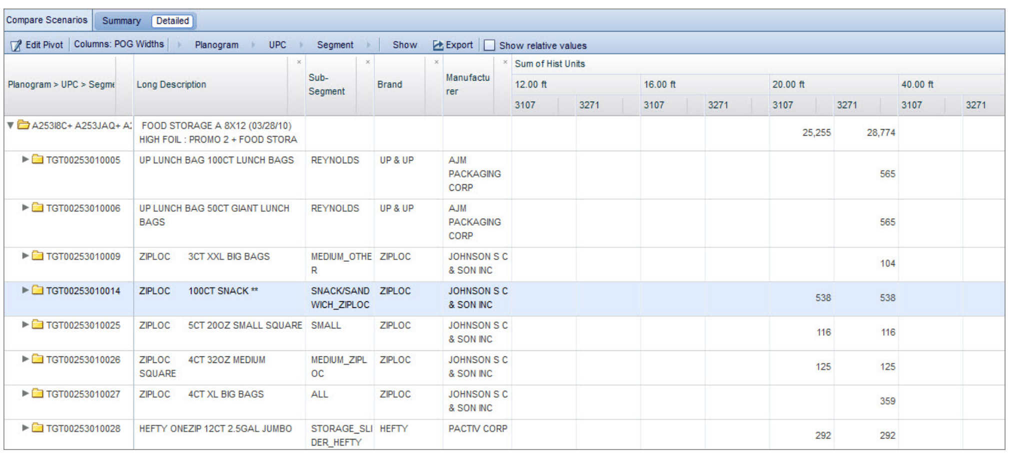
Select which scenarios to compare out of the available scenarios by double-clicking a scenario or using the arrows. Then click **Next**. The pop-up window moves on to Step 2.



Select metrics to apply to the scenarios you are comparing by checking the boxes in the **Metrics** area. Checking a box in the **Hist.** column will use Historical data while checking a box under the **Opt.** column will use Optimized data. Select if you want to use the **Sum**, **Avg.** (Average), **Min** (Minimum), or **Max** (Maximum) from the drop-down menu. The default is **Sum**. Then click **Next**. The pop-up window moves on to Step 3.



You will be prompted to select which columns you would like to include in the report based on your selections from the previous screen. Depending on the number of metrics and row fields selected, the application will set a maximum limit on how many column values you can select. Select the check-boxes next to the column values you would like to include. Click **Apply**. The comparative Pivot Table report will be generated with the scenarios and metrics you selected.

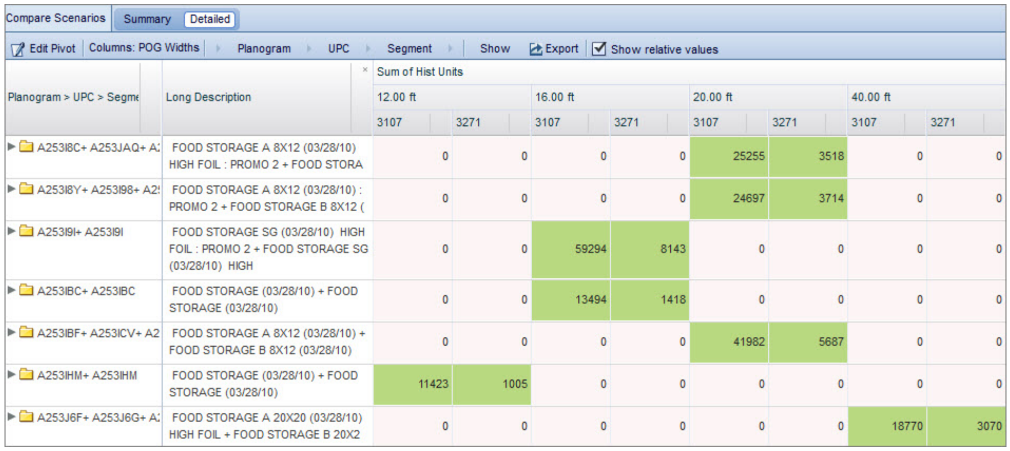


Compare Scenarios | Summary | Detailed

Edit Pivot | Columns: POG Widths | Planogram | UPC | Segment | Show | Export | Show relative values

Planogram > UPC > Segme	Long Description	Sub-Segment	Brand	Manufacturer	Sum of Hist Units 12.00 ft 3107	3271	16.00 ft 3107	3271	20.00 ft 3107	3271	40.00 ft 3107	3271
A253I8C+ A253JAQ+ A:	FOOD STORAGE A 8X12 (03/28/10) HIGH FOIL : PROMO 2 + FOOD STORA								25,255	28,774		
TGT00253010005	UP LUNCH BAG 100CT LUNCH BAGS	REYNOLDS	UP & UP	AJM PACKAGING CORP						565		
TGT00253010006	UP LUNCH BAG 50CT GIANT LUNCH BAGS	REYNOLDS	UP & UP	AJM PACKAGING CORP						565		
TGT00253010009	ZIPLOC 3CT XXL BIG BAGS	MEDIUM_OTHER	ZIPLOC	JOHNSON S C & SON INC						104		
TGT00253010014	ZIPLOC 100CT SNACK **	SNACK/SANDWICH_ZIPLOC	ZIPLOC	JOHNSON S C & SON INC					538	538		
TGT00253010025	ZIPLOC 5CT 20OZ SMALL SQUARE	SMALL	ZIPLOC	JOHNSON S C & SON INC					116	116		
TGT00253010026	ZIPLOC 4CT 32OZ MEDIUM SQUARE	MEDIUM_ZIPLOC	ZIPLOC	JOHNSON S C & SON INC					125	125		
TGT00253010027	ZIPLOC 4CT XL BIG BAGS	ALL	ZIPLOC	JOHNSON S C & SON INC						359		
TGT00253010028	HEFTY ONEZIP 12CT 2.5GAL JUMBO	STORAGE_SLIDER_HEFTY	HEFTY	PACTIV CORP					292	292		

To go back and change any of the metrics, click **Edit Pivot**. You can expand the column values by clicking on the folders. The **Long Description** column will be added, along with additional metrics depending on what you selected when building the comparative pivot report. If you select the **Show relative values** checkbox, the report will only display relative differences from the values of the first scenario to all other scenarios.



Compare Scenarios | Summary | Detailed

Edit Pivot | Columns: POG Widths | Planogram | UPC | Segment | Show | Export | Show relative values

Planogram > UPC > Segme	Long Description	Sum of Hist Units 12.00 ft 3107	12.00 ft 3271	16.00 ft 3107	16.00 ft 3271	20.00 ft 3107	20.00 ft 3271	40.00 ft 3107	40.00 ft 3271
A253I8C+ A253JAQ+ A:	FOOD STORAGE A 8X12 (03/28/10) HIGH FOIL : PROMO 2 + FOOD STORA	0	0	0	0	25255	3518	0	0
A253I8Y+ A253I98+ A2!	FOOD STORAGE A 8X12 (03/28/10) : PROMO 2 + FOOD STORAGE B 8X12 (	0	0	0	0	24697	3714	0	0
A253I9I+ A253I9I	FOOD STORAGE SG (03/28/10) HIGH FOIL : PROMO 2 + FOOD STORAGE SG (03/28/10) HIGH	0	0	59294	8143	0	0	0	0
A253IBC+ A253IBC	FOOD STORAGE (03/28/10) + FOOD STORAGE (03/28/10)	0	0	13494	1418	0	0	0	0
A253IBF+ A253ICV+ A2	FOOD STORAGE A 8X12 (03/28/10) + FOOD STORAGE B 8X12 (03/28/10)	0	0	0	0	41982	5687	0	0
A253IHM+ A253IHM	FOOD STORAGE (03/28/10) + FOOD STORAGE (03/28/10)	11423	1005	0	0	0	0	0	0
A253J6F+ A253J6G+ A:	FOOD STORAGE A 20X20 (03/28/10) HIGH FOIL + FOOD STORAGE B 20X2	0	0	0	0	0	0	18770	3070

Exporting the Compare Scenarios Report

Use this procedure to export the Compare Scenarios report for offline viewing.

About this task

You can export the Compare Scenarios report for offline viewing.

To export the Compare Scenarios report:

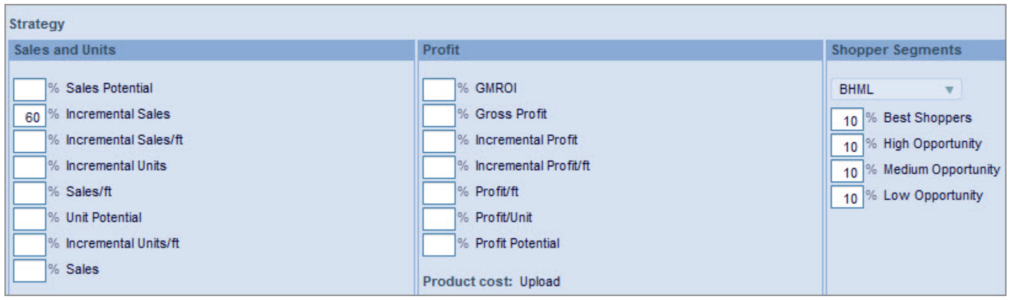
Procedure

1. Generate the Compare Scenarios report.
2. Click the **Export** button.
3. When the browser pop-up appears, select what file-type you would like the report to be saved as. The file can be exported in a visual file format such as a .png or .jpg file.
4. Select the file location for the report to be saved in.
5. Click **Save**

Product Attractiveness

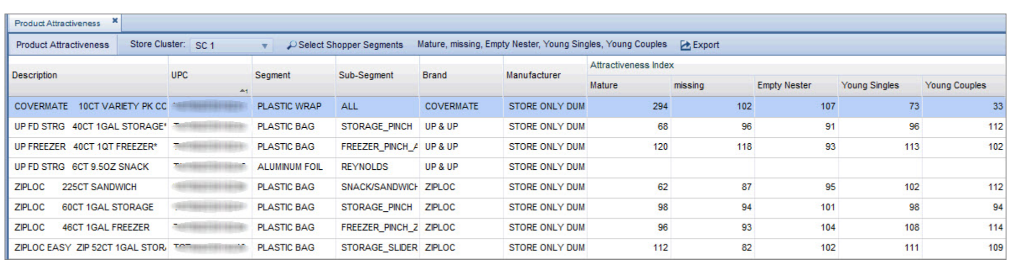
The Product Attractiveness report displays how attractive each product is to a shopper segment that you set.

The Product Attractiveness report displays how attractive each product is to a shopper segment that you set. To access the report, you must set a specific segment for a scenario. To set a shopper segment, select a scenario under the **Scenarios** tab. Then navigate to the **Shopper Segments** section under the **Strategy** tab of the **Settings** panel. Use the drop-down menu to set specific shopper segments, and fill in the blank fields to allocate weight among each segment. See "Strategy" on page 48 for more details.



Then, optimize the scenario. The **Product Attractiveness** report will appear under the **Report** tab of the **Results** panel.

Click **Generate Report**. The report opens.



Description	UPC	Segment	Sub-Segment	Brand	Manufacturer	Attractiveness Index				
						Mature	missing	Empty Nester	Young Singles	Young Couples
COVERMATE 10CT VARIETY PK CC	[illegible]	PLASTIC WRAP	ALL	COVERMATE	STORE ONLY DUM	294	102	107	73	33
UP FD STRG 40CT 1GAL STORAGE*	[illegible]	PLASTIC BAG	STORAGE_PINCH	UP & UP	STORE ONLY DUM	68	96	91	96	112
UP FREEZER 40CT 1QT FREEZER*	[illegible]	PLASTIC BAG	FREEZER_PINCH_A	UP & UP	STORE ONLY DUM	120	118	93	113	102
UP FD STRG 6CT 9.5OZ SNACK	[illegible]	ALUMINUM FOIL	REYNOLDS	UP & UP	STORE ONLY DUM					
ZIPLOC 225CT SANDWICH	[illegible]	PLASTIC BAG	SNACK/SANDWICH	ZIPLOC	STORE ONLY DUM	62	87	95	102	112
ZIPLOC 60CT 1GAL STORAGE	[illegible]	PLASTIC BAG	STORAGE_PINCH	ZIPLOC	STORE ONLY DUM	98	94	101	98	94
ZIPLOC 46CT 1GAL FREEZER	[illegible]	PLASTIC BAG	FREEZER_PINCH_Z	ZIPLOC	STORE ONLY DUM	96	93	104	108	114
ZIPLOC EASY ZIP 52CT 1GAL STOR	[illegible]	PLASTIC BAG	STORAGE_SLIDER	ZIPLOC	STORE ONLY DUM	112	82	102	111	109

The **Attractiveness Index** section of the grid displays the shopper segments that you set as columns. Under each shopper segment is a numerical value that indicates how attractive the product is to that shopper segment. The higher the number, the more attractive that product is to that segment.

The **Opt. Action** column displays whether Optimization recommends that the product be added, deleted, or retained.

1 Default

Sales		Units		Product Type	Opt Action
Hist	Opt	Hist	Opt		
$0	$469,385	0	26,992	**Market**	●
$80,156	$76,162	27,979	26,566	Stocked No Sales	✓
$80,156	$76,162	27,979	26,566	Stocked No Sales	✓
$8,603	$7,948	3,360	3,102	Stocked No Sales	✓
$3,863	$0	2,326	0	Stocked	●
$48,349	$41,198	20,332	17,323	Stocked	✓
$4,894	$0	3,175	0	Stocked	✓
$11,603	$10,671	4,890	4,497	Stocked	✓
$14,724	$13,543	6,176	5,680	Stocked	✓
$27,390	$25,622	10,744	10,044	Stocked No Sales	✓
$29,509	$0	9,843	0	Stocked	✓
$16,636	$15,691	3,635	3,428	Stocked	✓
$20,982	$17,843	8,219	6,989	Stocked	✓
$318	$299	108	101	Stocked No Sales	✓
$1,797	$1,571	523	457	Stocked No Sales	✓
$10,569	$9,762	4,902	4,528	Stocked	✓
$13,706	$12,542	6,367	5,824	Stocked	✓

To change which shopper segments the report displays, click **Select Shopper Segments**. The **Select Segments** pop-up window opens.

Select Segment(s)

	Segment	Avg Index
☑	Mature	117
☑	missing	109
☑	Empty Nester	106
☑	Young Singles	104
☑	Young Couples	102
☐	Mom with Teen	94
☐	Mom with Baby	92
☐	Mom with Tween	90

Cancel OK

Select or deselect the check-boxes to display or omit the corresponding segments in the report. The segments you select are displayed at the pane header. Additionally, they will each have their own column in the report.

You can export the Product Attractiveness report by clicking **Export**.

Chapter 5. Managing product data

Product data is established in Data Maintenance, through either direct editing in a Data Maintenance report or by importing from OpenLink or an Excel file, before your company can leverage certain IBM Omni-Channel Merchandising features.

For example, in Price Management and Price Optimization, your company must populate Size Family/Class data for each related product before you can utilize the Size Family & Size Class rule for price optimization. In Promotion Planning & Execution and Customer Trade Planning, your company must configure location group classes before you can build a promotion. In the Markdown Optimization application, Salvage Values or Out Dates are required before they can be applied in logical rules for your optimizations.

Related Topics

"Data maintenance reports"

Retail cost margins

Data maintenance reports

Data in IBM Omni-Channel Merchandising applications can be viewed or updated in reports.

All Data Maintenance reports are available at the Division or Chain level, and many are available at various aggregation levels. The reports are either populated from OpenLink, or from Excel spreadsheets that you create and import.

Related concepts:

"Price management & optimization reports"

"Promotion planning & execution reports" on page 99

"Markdown optimization reports" on page 100

"Viewing reports" on page 101

"Product analyzer utility" on page 101

"Reports" on page 101

Price management & optimization reports

Informational reports allow for the setup of groups and provide overviews of category details. After your data is imported, either through OpenLink or from Excel files, you must configure the data within the reports that support Price Management and Price Optimization rules.

For example, to use the Line rule, you define line groups in the **Line Group** report.

These are the Data Maintenance reports that must be populated to support the rules:

- **Anchor Price -** Price Drift rule
- **Anchor Class -** Anchor Class rule

- **Brand Class & Family -** Brand rule
- **Cost Class and Family** - Cost Based Pricing rule
- **Competitive Products** - Competitive rule, Compliance rule
- **Custom Relationships** - Custom Relationship rule
- **Line Group** - Line Price rule (Line Price is a golden rule in the Price application)
- **Multiple Price Points** - Multiples rule
- **Price/Cost** - Price rule - Product Group Limits
- **Product Details** - Other Class 1/Other Class 2 rule, Product to Product rule, Tiered Pricing rule
- **Product or Line Relationship** - Product or Line Relationship rule
- **Size Class & Family** - Size rule

In addition to reports that support rules used in Price Management and Price Optimization, the following general data and diagnostic reports may also be viewed in Data Maintenance:
- **IBM Omni-Channel Merchandising Categories**
- **Data Health**
- **Product DC**
- **SKU/Zone Attribute**
- **Sellable Items**
- **Sellable Items Delete History**
- **Transfer Price**
- **Unscanned Products**
- **VAT**

Exception reports allow for data validation. These reports display products for which the initial prices are not adhering to specific rules. For example, the **Line Exceptions** report shows the products that are not line grouped on the shelf, but should be line grouped according to your strategy. Examine these reports to prevent unintended results while optimizing. See "Exception reports" on page 125 for more information.

Related Topics

"Exception reports" on page 125
"Anchor price report" on page 102
"Anchor class report" on page 102
"Brand class and family report" on page 103
"Competitive products report" on page 107
"Corporate financials report" on page 108
"Cost class & family report" on page 108
"Cost configuration report" on page 110
"Custom report" on page 110
"Line group report" on page 111
"Multiple price points report" on page 114
"Product or line relationship report" on page 114
"Price/cost report" on page 115
"Product details report" on page 118
"Data health report" on page 119

Promotion planning & execution reports

The **Data Maintenance** page includes reports that you can use to help execute promotions. The reports allow you to manage a variety of data, such as product details, future cost/price and event locking defaults. You can also revise or update data to reflect vendor cost changes and competitive prices.

Discontinued products may still appear in reports. Filter the report if you do not want discontinued products to appear.

The following reports are available:

- **Alternate - Sellable Item Map** - Alternate products in each consumer unit (sellable item)
- **Brand Class & Family** - Brand Family/Brand Class information for products in Promotion Planning & Execution and Customer Trade Planning

  Note: This report is not typically used with Promotion Planning & Execution and Customer Trade Planning.
- **Competitive Products** - Competitive products and their price and cost information down to the store/SKU level
- **Data Health** - Empty values that could prevent a successful forecast, such as missing units or product values
- **Event Locking Settings** - Default number of days for the Committed and Locked statuses for all event sub-types
- **Future Cost** - Detailed future cost information down to the store/SKU level
- **Future Price** - Detailed future price information down to the store/SKU level
- **Line Group** - Line Group information for products in Promotion Planning & Execution and Customer Trade Planning

  Note: This report is sometimes used to populate PPG information, but IBM Omni-Channel Merchandising recommends that you use the promoted product group (PPG) functionality for this purpose.
- **Logistical - Sellable Item Map (Company Level)** - Logistical unit to consumer unit relationship information and preferred logistical unit for the total company
- **Logistical - Sellable Item Map (Store Level)** - Logistical unit to consumer unit relationship information and preferred logistical unit for individual location (store) level
- **Logistical Items** - Logistical unit information for products in Promotion Planning & Execution and Customer Trade Planning
- **Manufacturer** - Manufacturer for which results should be calculated (CP-only)

- **Multiple Price Points** - Price last digits, which should be rounded to multiples

  Note: This report is not typically used with Promotion Planning & Execution and Customer Trade Planning.
- **Price/Cost** - Detailed price and cost information down to the store/SKU level
- **Product Details** - All product information for items in Promotion Planning & Execution and Customer Trade Planning
- **Sellable Items** - All sellable items, as well as each product's hierarchy within its category
- **Sellable Items Delete History** - Shows all sellable items that have been deleted after data import and setup
- **Size Class & Family** - Size Family/Size Class information for products in Promotion Planning & Execution and Customer Trade Planning

  Note: This report is not typically used with Promotion Planning & Execution and Customer Trade Planning.

Related Topics

"Alternate - sellable item map report" on page 102
"Brand class and family report" on page 103
"Competitive products report" on page 107
"Data health report" on page 119
"Future cost report" on page 111
"Future price report" on page 111
"Line group report" on page 111
"Logistical - sellable item map (company level)" on page 112
"Logistical - sellable item map (store level)" on page 113
"Logistical items" on page 113
"Manufacturer report" on page 114
"Multiple price points report" on page 114
"Price/cost report" on page 115
"Product details report" on page 118
"Sellable items report" on page 123
"Sellable items delete history report" on page 123
"Size class and family report" on page 105
"Event locking settings report" on page 125

Markdown optimization reports

These are the Data Maintenance reports that must be populated to support Markdown Optimization.

- **IBM Omni-Channel Merchandising Categories**
- **Line Group**
- **Product Details**
- **Product/Store Details - Long**
- **Product/Store Details - Short**

Related Topics

"IBM Omni-Channel Merchandising categories report" on page 119

"Line group report" on page 111
"Product details report" on page 118
"Product/store details report - long" on page 120
"Product/store details report - short" on page 122

Viewing reports

To view a Data Maintenance report, choose **Data** > **Data Maintenance**.

Select a report from the **Report** drop-down menu.

Product analyzer utility

The Product Analyzer utility shows details for the selected product, such as product group information, other items in the same line price group, prices and costs for that product, competitive data, and other attributes related to that product.

In many Data Maintenance reports, you can right-click on a product at the SKU levels (SKU/store or SKU/zone) and select **View Product Relationships** to open the Product Analyzer utility (PRA). The **Product Relationships** tab in the Product Analyzer shows details for the selected product, such as product group information, other items in the same line price group, prices and costs for that product, competitive data, and other attributes related to that product.

Within the PRA utility, you can also navigate to the **Price Response Analysis** or **Promotion Response Analysis** tabs. **Price Response Analysis** graphically illustrates sensitivity to base price changes for products, Demand Groups, line groups, and categories. You can view the response and see the lift effects relative to the other products in the category or Demand Group. The product information can be used to help in determining best prices and high image items. **Promotion Response Analysis** illustrates customer responsiveness to various promotion drivers, such as advertising or display, and sensitivity to promotional price changes for products, promoted product groups and categories. See the **Product Analyzer** online help accessed from the PRA utility for more information.

You can access the PRA utility from these Data Maintenance reports:

- **Brand Class & Family**
- **Competitive Products**
- **Current Comp Retail Below Cost Exceptions**
- **Current Retail Above Comp Retail Exceptions**
- **Price/Cost**
- **Price/Cost - Basic**
- **Product Details**
- **Product Salvage Value**
- **Product Status**
- **Size Class & Family**

Reports

The Data Maintenance reports are described in detail in this section.

Alternate - sellable item map report

The **Alternate - Sellable Item Map** report displays each of the "alternate" items that belong to each consumer unit (also called "sellable item") and indicates which product in each consumer unit is the **Primary Sellable Item**.

A consumer unit is an abstracted "sales unit" which may aggregate multiple unique UPCs into what a consumer is likely to consider a single item. Often, a consumer unit will encompass differently-branded versions of the same product. For example: A 12OZ can of cola may have three different UPCs that identify the item with standard packaging, Christmas packaging, or Olympics packaging. These three UPCs can be linked by a single **Consumer Unit Code**, indicating that from a customer's perspective, the items are the same.

By default, the **Alternate - Sellable Item Map** report will not show any data. You can use the search fields to populate the report.

Not all companies use consumer unit functionality. If your company does not use consumer units, no data will be available in this report.

Anchor price report

The anchor prices displayed in the **Anchor Price** report are used by the Price Drift rule in the Price application. Anchor prices are used to constrain optimized prices.

You can set an anchor price for a product in the **Scenarios** or **Scenario Summary** page to keep the initial base price (base price used during the initial optimization) constant over subsequent category optimizations. The anchor price for the product will then display in this report.

You can also import a set of anchor prices at SKU/Store or SKU/Zone level using the **Anchor Prices** import format to populate this report. Any existing anchor prices for all products and stores in the category will be overwritten. See "Importing data" on page 137 for the required data columns in the imported file.

The **Anchor Price** report displays information such as the product description, UPC, zone, store name, current price, anchor price, and the difference between current price and anchor price. The report can be aggregated at the SKU/Store or SKU/Zone level.

Anchor class report

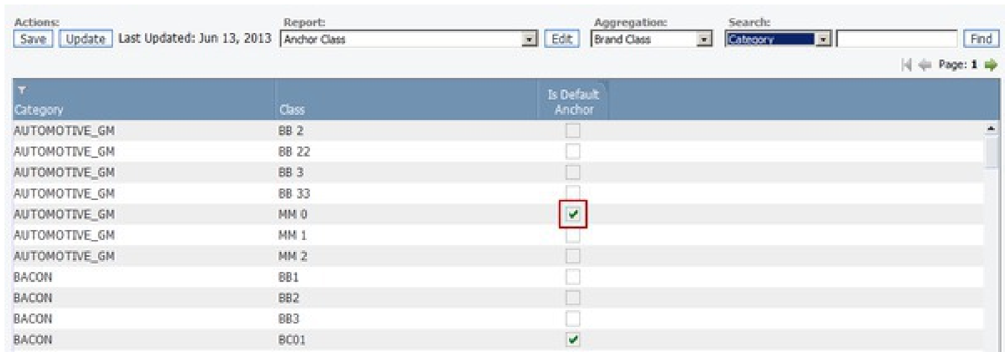
Use the **Anchor Class** report to assign the **Is Anchor** attribute to Brand classes and families.

About this task

When you define the Anchor Class rule for scenario optimizations, only the non-anchored products will move in price to adhere to the Brand rule in a Rules Based Price scenario. For example, if the anchored brand is the National brand and if there are Brand rule exceptions, then the scenario will move the prices of only the Private Label brand (since National is anchored) to enforce compliance to the Brand rule.

The **Anchor Class** report can contain the Brand families, Brand classes, categories, and the **Is Anchor** or **Is Default Anchor** attribute. Only one Brand class can be the anchor class for a Brand family when using the **Brand Class & Family** aggregation, or for a category when using the **Brand Class** aggregation.

Anchored Brand classes can also be imported into the IBM Omni-Channel Merchandising system using an Excel file. See "Importing data" on page 137 for more information. If more than one class is set as the anchor in the import file, the anchor class defined last will override the ones previously defined. The **Anchor Class** report can be updated with the most current Anchor Class information by clicking the **Update** button.



Defining Anchor Classes

When using the **Brand Class & Family** aggregation, you set the **Is Anchor** attribute for each Brand class that you want anchored in the **Anchor Class** report. You can also use the **Brand Class** aggregation to set the default anchor class for any given category.

To define anchored Brand classes:

Procedure

1. Choose **Data** > **Data Maintenance** to open the **Data Maintenance** page.
2. Choose the **Anchor Class** report from the **Report** drop-down menu. The **Anchor Class** report displays.
3. In the report, set the checkbox in the **Is Anchor** or **Is Default Anchor** column to anchor a Brand class. Only one Brand class under the same Brand family can be the anchor.

4. Click **Save**.
5. You can click **Update** to update the report with the most recently imported anchor classes.

Brand class and family report

Use the **Brand Class and Family** report to assign Brand families and Brand classes to products.

About this task

When you define the Brand rule for scenario optimizations, you create a relationship between products in the Brand classes. For example, in the Cola Brand family, you might assign Coke soda to a National Brand class and Private Label cola to a Private Label Brand class. You can define the Brand rule to ensure that the national brand colas cost more than the private label version of the colas.

The **Brand Class and Family** report displays information such as the brand, Brand family, Brand class, price, cost, UPC, and line group. Anchored Brand classes can be viewed in the report by setting the **Is Anchor** column to display in **Edit Report** (see "Anchor class report" on page 102 for more information about anchored Brand classes and the Anchor Class rule). Use the report to review current brand relationships, or set up Brand classes and families for the Brand rule used in the Price application. The report can be aggregated by SKU or Line.

Brand families and classes can also be imported into the IBM Omni-Channel Merchandising system. See "Importing data" on page 137 for the required data columns in the imported file.

In this report, you can select and right-click on a product at the SKU levels to open the **Product Relationships** tab in the Product Analyzer utility (PRA). The **Product Relationships** tab shows details for the selected product, such as Product Group information, other items in the same Line Price Group, prices and costs for that product, competitive data, and other attributes related to that product. See "Product analyzer utility" on page 101 for more information.

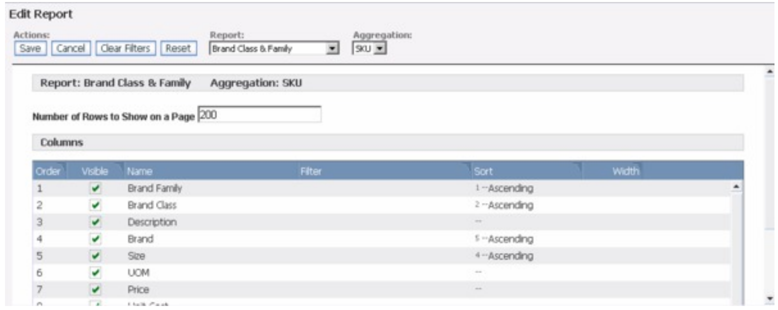
Defining Brand Family/Brand Class

You can define Brand families and Brand classes for active products in the **Brand Class and Family** report. First sort the products by brand, size, and price in the **Edit Report** page.

To define Brand families and Brand classes:

Procedure

1. Choose **Data** > **Data Maintenance** to open the **Data Maintenance** page.
2. Choose the **Brand Class and Family** report from the **Report** drop-down menu. The **Brand Class and Family** report displays.
3. Click **Edit** next to the report name. The **Edit Report** page displays.



4. Clear any existing sort values by clicking in the **Sort** column to display the drop-down textbox, and selecting **None**. Also, delete any numerical value.
5. To first sort by brand, click in the **Sort** column next to **Brand**, and enter **1**. Choose **Ascending**.
6. Next, sort by size by clicking in the **Sort** column next to **Size**, and entering **2**. Choose **Ascending**.
7. Finally, sort by price by clicking in the **Sort** column next to **Price**, and entering **3**. Choose **Ascending**.
8. Click **Save**, and return to the **Brand Class and Family** report. The data will be sorted according to the sort values. Sorting will make it easier to assign Brand classes and families.
9. Select the **SKU** aggregation level.
10. In the report, click in the **Brand Class** and **Brand Family** columns for a product to display drop-down menus. Select an existing Brand family and Brand class, or select **Custom**, and enter unique names for the Brand classes and families.
11. Click **Save**.

Related Topics

"Anchor class report" on page 102

"Product analyzer utility" on page 101

Size class and family report

Use the **Size Class and Family** report to assign Size families and Size classes to products.

About this task

When you define the Size rule for scenario optimizations in the Price application, you create a relationship between larger and smaller products in the Size classes. The Size rule will ensure the following during the optimizations:

- Larger sizes are priced higher than smaller sizes
- Larger size products offer a better value on a unit basis than the smaller products

The **Size Class and Family** report displays information such as Size family, Size class, cost, UPC, line group, and demand group. You choose a Size class from a list of Size classes that are defined in the **Size Class Definitions** page, such as XXX-SMALL or LARGE, to associate with a product. These Size classes are defined as part of Size class sets, which are used to group similar Size classes together by product category. This Size class structure enables you to have the same Size class name for different categories.

Size families and classes can also be imported into the IBM Omni-Channel Merchandising system. See “Importing data” on page 137 for the required data columns in the imported file.

In this report, you can select and right-click on a product at the SKU levels to open the **Product Relationships** tab in the Product Analyzer utility (PRA). The **Product Relationships** tab shows details for the selected product, such as Product Group information, other items in the same Line Price Group, prices and costs for that product, competitive data, and other attributes related to that product. See “Product analyzer utility” on page 101 for more information.

Defining Size Class Sets

Size class sets allow you to group related Size classes by category. For example, you might define a set named 'Set 1' for the Hosiery/Socks category to contain Size classes XXXS through XXXL, and a set named 'Main' for the Liquid Detergent category with Size classes Small, Medium, Large.

Note: The IBM Omni-Channel Merchandising standard size class naming convention, such as x-small, xx-small, etc., can be customized. Contact IBM Omni-Channel Merchandising Customer Support for more information.

You can associate the Size class set with a category in the IBM Omni-Channel Merchandising OpenLink **Category Manager** page. When you are ready to assign a Size class to a product in the **Size Class and Family** report, only the Size classes for the selected category will display in the drop-down list.

Note: You must have the **Manage Size Class Definition** permission set for your role in the **Edit Role** page to create, edit, or delete Size class sets. See “Editing user permissions” on page 186 for more information.

To define Size class sets:

1. Choose **Data** > **Size Class Definitions** to open the **Size Class Definitions** page. The page displays all existing Size class sets, their Size classes, and who last modified the set.

   Note: The **Default** Size class set is the default Size class set assigned to all categories in the **Category Manager** which do not have a user-defined Size class set. This Size class set is populated with Size classes, which can be edited.
2. Click **New Size Class Set** to define a new Size class set. Enter a unique name of the set, a description of the set, and Size classes within the set separated by commas (up to 50 size classes). The Size classes will display in the same order in the **Size Class and Family** report (with the first one at the top).
3. Click **Save** to save the Size class set and close the dialog box. The new Size class set will be added to the **Size Class Definitions** page**.**

To edit Size class sets:

1. In the **Size Class Definitions** page, right-click on a Size class set, and select **Edit**.
2. You can edit the name, description, update flag, or edit or delete the Size classes within the set.

3. Click **Save** to save your changes. In the confirmation message that appears, click **Save** to save and return to the **Size Class Definitions** page, or **Cancel** to cancel your changes and return to the editor.

To delete Size class sets:

1. In the **Size Class Definitions** page, right-click on a Size class set, and select **Delete**. If there is no category using this set, a confirmation message will appear. If there are some categories using this set, or it is the default set, then a message will appear warning that it cannot be deleted.
2. Click **OK** to close the message that appears.

Defining Size Classes and Size Families

You can define Size classes and Size families for active products in the **Size Class and Family** report. First sort the products by brand, description, and size in the **Edit Report** page.

To define Size classes and Size families:

1. Choose **Data** > **Data Maintenance** to open the **Data Maintenance** page.
2. Choose the **Size Class and Family** report from the **Report** drop-down menu. The **Size Class and Family** report displays.
3. Click **Edit** next to the report name. The **Edit Report** page displays.
4. Clear any existing sort values by clicking in the **Sort** column to display the drop-down textbox, and selecting **None**. Also, delete any numerical value.
5. To first sort by brand, click in the **Sort** column next to **Brand**, and enter **1**. Choose **Ascending**.
6. Sort by description by clicking in the **Sort** column next to **Description**, and entering **2**. Choose **Ascending**.
7. Sort by size by clicking in the **Sort** column next to **Size**, and entering **3**. Choose **Ascending**.
8. Click **Save**, and return to the **Size Class and Family** report. The data will be sorted according to the sort values. Sorting will make it easier to assign Size families and classes.
9. Select the **SKU** aggregation level.
10. In the report, click in the **Size Family** column for a product to display a drop-down menu. Select an existing Size family, or select **Custom**, and enter a unique Size family name.
11. Click in the **Size Class** column to choose a Size class from the drop-down list.
12. Click **Save**.

Related Topics

"Product analyzer utility" on page 101

Competitive products report

The **Competitive Products** report displays all competitive products, by competitor, at the zone or store level. Use the **Competitive Products** report to view and edit the average price of your product, and compare it with the average price of a competitor's product.

The competitor prices displayed in the **Competitive Products** report are used by the Competitive and Compliance rules in the Price application.

You can click **Delete Comp Data** to delete outdated or inaccurate competitive product information in this report by one or more categories, divisions, zones, store numbers, and competitor. Competitive information older than a specified date will be deleted. The information will be "soft-deleted" until you permanently delete the information in the Task Scheduler, but will not be available in competitive rules in either case.

You can also delete competitive information for a particular product by right-clicking on the product row and selecting **Delete**.

To view anomalies in this report, you can sort by the following:
- Sort ascending by Comp Price at the SKU/Store level to ensure that no 0 or .01 competitive prices exist.
- Sort descending by Comp Price to view large relative competitive information versus the base price.

In this report, you can select and right-click on a product at the SKU levels to open the **Product Relationships** tab in the Product Analyzer utility (PRA). The **Product Relationships** tab shows details for the selected product, such as Product Group information, other items in the same Line Price Group, prices and costs for that product, competitive data, and other attributes related to that product. See "Product analyzer utility" on page 101 for more information.

Related Topics

"Product analyzer utility" on page 101

Corporate financials report

Use the **Corporate Financials** report to view and edit corporate financial information that is used for ABC cost calculations. You must have the **ABC Reporting and Administration** permission to view the report.

The report includes the following columns:
- **Revenue** - Amount of sales collected
- **Profit Before Tax** - Revenue, less variable costs, fixed costs, and ABC costs
- **Overhead** - All operating expenses, other than supply-chain costs
- **DC Cost of Capital** - The opportunity cost of capital used to calculate the carrying costs for inventory
- **Name** - The name of the corporation. This column is hidden by default, and must be set to display in the **Edit Report** page.

Cost class & family report

Use the **Cost Class & Family** report to assign Cost families and Cost classes to products.

About this task

After defining the Cost families, you auto-generate the Cost classes in this report. The order of Cost classes (tiers) is determined at the Line/Chain/Mode level by default. For example, Cost Class 1 would consist of the products in Line Group 1 with the lowest mode cost, Cost Class 2 would consist of the products in Line Group 2 with the next highest mode cost, and so on. Contact your IBM

Omni-Channel Merchandising Representative for more information about configuring the level for determining the Cost class tiers. Cost families and Cost classes must be in the same division.

Note: You can specify which cost field to use (**Cost**, **Cost1**, **Cost2** or **Cost3**) for calculating the cost class order in the **Price Update Configuration** report in the **Manage Categories** page.

When you define the Cost Based Pricing rule for scenario optimizations in the Price application, you create a relationship between products in the Cost classes within a Cost family. The rule allows you to set the difference in unit GM or retail price between products by their cost amounts. For example, "For each Cost family, the retail price of each higher cost class product must be between $.05 and $1.00 above that of the next lower cost class product.

The **Cost Class & Family** report displays information such as the Cost family, Cost class, product description, price, Line Mode Cost (current), Line Mode Cost (on generate date), unit cost, Cost1, UPC, and line group. Use the report to review current cost relationships, or set up Cost classes and families for the Cost Based Pricing rule. The report can be aggregated by SKU or Line.

Cost families can also be imported into the IBM Omni-Channel Merchandising system. See "Importing data" on page 137 for the required data columns in the imported file.

Defining Cost Family/Cost Class

You can define Cost families and Cost classes for active products in the **Cost Class & Family** report. First sort the products by Cost family or brand, and then cost in the **Edit Report** page.

To define Cost families and Cost classes:

Procedure

1. Choose **Data** > **Data Maintenance** to open the **Data Maintenance** page.
2. Choose the **Cost Class & Family** report from the **Report** drop-down menu. The **Cost Class & Family** report displays.
3. Click **Edit** next to the report name. The **Edit Report** page displays.
4. Clear any existing sort values by clicking in the **Sort** column to display the drop-down textbox, and selecting **None**. Also, delete any numerical value.

5. If you have already imported some Cost families in the report, first sort by Cost family, click in the **Sort** column next to **Cost Family**, and enter **1**. Choose **Ascending**.
6. You can sort by brand by clicking in the **Sort** column next to **Brand**, and entering **2**. Choose **Ascending**.
7. Next, sort by cost by clicking in the **Sort** column next to **Unit Cost**, and entering **3**. Choose **Ascending**.
8. Click **Save**, and return to the **Cost Class & Family** report. The data will be sorted according to the sort values. Sorting will make it easier to assign Cost classes and families.
9. In the report, click in the **Cost Family** column for products to enter unique names for the Cost families.
10. You can click **Populate Mode Cost** to update the Line Mode Cost (current) column.
11. Click **Generate Cost Classes** to auto-generate the Cost classes based on your configurations. The Cost classes last generated mm/dd/yyyy in the report summary will update.
12. Click **Save**.

Cost configuration report

Use the **Cost Configuration** report to assign the cost type (**Cost**, **Cost1**, **Cost2**, **Cost3**) to a category at SKU/Chain, SKU/Division, and Line/Zone levels. You must have the **Manage Cost Configuration** permission set to edit or import the cost types in this report.

The cost types defined for products will be the default costs used in optimized and Rules Priced scenarios, as well as Price Updates.

You may have imported different types of costs such as Vendor List, Inventory Billing Costs (IBC), or new manufacturer costs that are used in different divisions or zones. For example, if Tulsa is the only division which uses a different cost, you could define a cost type at the SKU/Chain level and then expand to the Tulsa division to define its particular cost type.

Cost configurations only need to be set up for exceptions to the scenario level default in the **Manage Categories** page. If costs are not defined for a set of products in the **Cost Configuration** report, then the scenario action will refer to the default configuration in the **Manage Categories** page.

The cost types can also be imported to this report using the **Cost Configuration - SKU/Chain**, **Cost Configuration - SKU/Division**, or **Cost Configuration - Line/Zone** import data type. See "Data File Formats" on page 139 for the required data formats in the import file.

Custom report

Use the **Custom** report to create specialized views of data across different store and product dimensions.

A basic results report can be customized using available fields. For example, to view results at the SKU/Chain level, sorted by Brand and Volume, you can set up the template in this report.

Custom relationships report

Use the **Custom Relationships** report to view and edit the products, relationship types, custom families, and custom classes used for the **Custom Relationship** rule in the Price application.

The rule sets price relationships between a product relationship type that you define, such as count of envelopes. For example, 500 envelopes must be priced at least 30% above 100 envelopes, within a custom family.

You must first import the product relationship types, custom families and custom classes into the IBM Omni-Channel Merchandising system. See "Importing data" on page 137 for the required data columns in the imported file.

Future cost report

The **Future Cost** report shows future costs and effective dates that are used in promotions.

The future data is imported via the IBM Omni-Channel Merchandising OpenLink application in the Price/Cost file. The costs may be modified in this report, but the planned dates cannot be changed once imported. If no values were loaded, the report will be blank.

It is critical to know the correct costs for the dates that you are planning promotions. For example, a Maintain Margin rule for an incorrect cost would yield an incorrect promoted price and faulty financial analysis.

Promotion Planning & Execution supports the business logic for handling future data, and indicates on various reports and pages that future data is being used in the forecasted results.

Future price report

The **Future Price** report shows future prices and effective dates that are used in promotions.

The future data is imported via the IBM Omni-Channel Merchandising OpenLink application in the Price/Cost file. The prices may be modified in this report, but the planned dates cannot be changed once imported. If no values were loaded, the report will be blank.

It is critical to know the correct prices for the dates that you are planning promotions. For example, a 25% discount off an incorrect base price would yield an incorrect promoted price and faulty financial analysis.

Promotion Planning & Execution supports the business logic for handling future data, and indicates on various reports and pages that future data is being used in the forecasted results.

Line group report

The **Line Group** report displays all products in the category sorted by current line price structures.

About this task

Use this report to create, edit, and view product information by line group for each product in the category that you chose as your default category. A line price group consists of products that are always priced the same, such as boxes of Jello or six packs of soda. All flavors of Jello are always the same price, so Jello products would be grouped together in a line price group.

All products with the same line group value will be priced the same during an optimization. The information in this report is used by the Line Price rule used in the Price application.

If a line group has items at different initial price points (for example, five products are included in the line group, where three are $1.20 and two are $.99), the Price application will take the volume weighted average (for example, $1.10) to create an initial price as the basis for optimization.

It is a good idea to line price products with free incremental volume (for example, 16 oz plus 3 oz free) with the same base product (for example, 16 oz) to ensure that an optimization will keep prices constant.

Defining Line Groups

You can define line groups for active products in the **Line Group** report. First sort the products by brand, price, and size in the **Edit Report** page.

To define line groups:

Procedure

1. Choose **Data** > **Data Maintenance** to open the **Data Maintenance** page.
2. Choose the **Line Group** report from the **Report** drop-down menu. The **Line Group** report displays.
3. Click **Edit** next to the report name. The **Edit Report** page displays.
4. Clear any existing sort values by clicking in the **Sort** column to display the drop-down textbox, and selecting **None**. Also, delete any numerical value.
5. To first sort by brand, click in the **Sort** column next to **Brand**, and enter **1**. Choose **Ascending**.
6. Sort by price by clicking in the **Sort** column next to **Price**, and entering **2**. Choose **Ascending**.
7. Sort by size by clicking in the **Sort** column next to **Size**, and entering **3**. Choose **Ascending**.
8. Click **Save**, and return to the **Line Group** report. The data will be sorted according to the sort values. Sorting will make it easier to assign line groups.
9. In the report, click in the **Line** column for a product to display a drop-down menu. Select an existing line group, or select **Custom**, and enter a unique line group name.
10. Click **Save**.

Logistical - sellable item map (company level)

The **Logistical - Sellable Item Map (Company Level)** report displays the relationships between logistical units (also called "logistical items") and consumer units (also called "sellable items") at the overall company level.

From this report, you can view the following details for each consumer unit to logistical unit relationship: **Sellable Item Key**, **Logistical Item Key**, **Pack**, **Is Preferred Logistical**, **Logistical Item Rank**, **Last Updated**, and **Last Updated By**. The preferred/default logistical unit is defined using the **Logistical Item Rank** field. If a logistical unit is the preferred/default, a checkmark will show in the **Is Preferred Logistical** field.

By default, this report will not be populated. Use the search fields to populate the report.

Relationships defined for an individual location/store in the **Logistical - Sellable Item Map (Store Level)** report override the company-level information.

Some companies do not use logistical units. If your company has not loaded logistical unit data, the **Logistical - Sellable Item Map (Company Level)** report will not populate.

Logistical - sellable item map (store level)

The **Logistical - Sellable Item Map (Store Level)** report displays the relationships between logistical units (also called "logistical items") and consumer units (also called "sellable items") at the individual store/location level.

From this report, you can view the following details for each consumer unit to logistical unit relationship: **Sellable Item Key**, **Location**, **Logistical Item Key**, **Pack**, **Is Preferred Logistical**, **Logistical Item Rank**, **Last Updated**, and **Last Updated By**. The preferred/default logistical unit is defined using the **Logistical Item Rank** field. If a logistical unit is the preferred/default, a checkmark will show in the **Is Preferred Logistical** field.

By default, this report will not be populated. Use the search fields to populate the report.

Relationships defined for an individual location/store in the **Logistical - Sellable Item Map (Store Level)** report override the company-level information.

Some companies do not use logistical units. If your company has not loaded logistical unit data, the **Logistical - Sellable Item Map (Store Level)** report will not populate.

Logistical items

The **Logistical Items** report displays all logistical units loaded for your company and details for each logistical unit. Some companies do not use logistical units. If your company has not loaded logistical unit data, the **Logistical Items** report will not populate.

A logistical unit (also called a "logistical item") indicates how a product is shipped to the retailer, i.e., pallet, case, display, etc. When adding an allowance to a promotion, users can select a specific logistical unit for a product, or allow the system to automatically choose the default. Calculations for metrics like gross margin use logistical unit details such as case pack size.

In the **Logistical Items** report, you can view the following details for each logistical unit: **Logistical Item Key**, **Name**, **Description**, **Case UPC**, **Pack**, **Manufacturer**, **Is Mixed**, **Is One Time Buy**, **Item Packaging Type**, **Store Receiving Type**, **Last Updated By**, and **Last Updated On**. Ranking and default/preferred logistical unit are defined in the **Logistical - Sellable Item Map (Company Level)** and **Logistical - Sellable Item Map (Store Level)** reports.

By default, the **Logistical Items** report will not be populated. Use the search fields to populate the report.

Manufacturer report

The **Manufacturer** report should only be used once during the initial set-up of Customer Trade Planning. To view this report, you must have the **Manage Manufacturer Organization** permission.

This report allows you to select the manufacturer for whom results metrics such as **Mfg. Gross Margin** and **Mfg. Total Unit Volume** should be calculated. Generally, only one manufacturer should be selected. Multiple manufacturers should only be selected if your product data contains multiple names for the same manufacturer, i.e., Pepsi, Pepsi, Inc., and Pepsi Inc. When multiple manufacturers are selected, manufacturer results metrics will sum the values for all selected manufacturers.

Multiple price points report

Use the **Multiple Price Points** report to view and edit the multiple price points available in a category.

A multiple price point is the price and multiple amount for multiple products, such as 3 for $1. For example, if the product is 3 for $1, you would enter **3 for $1** in this column. The information in this report is used by the Multiples rules used in the Price application.

The report displays the lowest new price that is assigned the multiple price point, the highest new price that is assigned the multiple price point, and the multiple price value, such as **3 for $2.00**.

Product or line relationship report

Use the **Product or Line Relationship** report to view and edit the products or line groups and relationship type (multiplier or relative) and value used for the **Product or Line Relationship** rule used in the Price application.

The **Product or Line Relationship** rule sets the price of the second product or line group in a pair based on a multiplier or relative value applied to the last optimized price of the first product or line group (the "driver"), as shown in these equations:

Price of UPC(2) = Price of UPC(1) x Multiplier Value

Price of UPC(2) = Price of UPC(1) + Relative Value

Prices in Line(2) = Prices in Line(1) x Multiplier Value

Prices in Line(2) = Prices in Line(1) + Relative Value

Examples of how to use this rule include:

- The everyday price of a bonus bag of candy must be exactly 50% of the everyday price of a regular bag of candy.
- The everyday price of a multi-pack of six cans of soda must be exactly six times the everyday price of one can of soda.
- The everyday price of a bonus pack of a bottle of wine and wine glass must be exactly the everyday price of the wine plus a flat amount (the flat amount is the relative value).
- The everyday prices in a private label group of pudding cups must be exactly 30% of the everyday prices in a name brand group of pudding cups.

The report displays UPC(1), UPC(2) at the SKU aggregation, or Line(1), Line(2) at the Line aggregation as well as the relationship type and value applied to the first product or line group. You select the relationship type of the value (**Multiplier** or **Relative**) in the **Relationship Type** column. The value that you enter in the **Value** column for a **Multiplier** relationship type must be a numeric value greater than zero.

You can permanently delete all line relationships for all categories, or product relationships by selected category, by clicking **Delete All**. Deleting existing relationships is useful before importing a new set of product or line relationship data.

Products and values can also be imported into the IBM Omni-Channel Merchandising system. See “Importing data” on page 137 for more information about importing the Product to Product Relationship or Line to Line Relationship data types from an Excel file.

Price/cost - basic report

The **Price/Cost - Basic** report is an abridged version of the **Price/Cost** report with fewer columns. This report may load faster on your system than the **Price/Cost** report. You can use it to view or edit the current price and cost of a product by SKU, store, or zone before running optimizations.

If you have multiple costs available, you can edit the report to set the **Cost 1** or **Cost 2** fields to display additional cost types. You can also set the manufacturer of the product to display from the **Edit Report** page.

You can also set a product as pre-priced for all stores in the **Preprice** column, or locked in the **Locked Price** column (indicated by a lock icon) for specific stores or zones. See “Price/cost report” for more information about locking prices.

You can override costs if inaccuracies exist, but subsequent data imports from OpenLink may overwrite manual cost changes in Price Management and Price Optimization. You should update in-house legacy systems

In this report, you can select and right-click on a product at the SKU levels to open the **Product Relationships** tab in the Product Analyzer utility (PRA). The **Product Relationships** tab shows details for the selected product, such as Product Group information, other items in the same Line Price Group, prices and costs for that product, competitive data, and other attributes related to that product. See “Product analyzer utility” on page 101 for more information.

Related Topics

“Price/cost report”

“Product analyzer utility” on page 101

Price/cost report

Use the **Price/Cost** report to view or edit the current price and cost of a product by store, zone, or line before running optimizations. You can sort this report by cost and price to check for data anomalies.

About this task

You can override costs if inaccuracies exist, but subsequent data imports from OpenLink may overwrite manual cost changes in Price Management and Price Optimization. You should update in-house legacy systems.

The report displays information such as the product description, UPC, zone, size, price, and unit cost. If you have multiple costs available, you can edit the report to set the **Cost 1** or **Cost 2** fields to display additional cost types. You can also set the manufacturer of the product to display at the SKU levels from the **Edit Report** page.

CP users can view costs for their manufactured products in the **Mfg. Cost** column at the SKU/Zone level, if their costs have been imported through a data load. Costs for other products are calculated using a Gross Margin ratio or other percentage.

You can also set a product as pre-priced for all stores in the **Preprice** column, or locked in the **Locked Price** column (indicated by a lock icon) for specific stores or zones. See "Price/cost report" on page 115 for more information about locking prices.

In this report, you can select and right-click on a product at the SKU levels to open the **Product Relationships** tab in the Product Analyzer utility (PRA). The **Product Relationships** tab shows details for the selected product, such as Product Group information, other items in the same Line Price Group, prices and costs for that product, competitive data, and other attributes related to that product. See "Product analyzer utility" on page 101 for more information.

Using Price Lock

To freeze the price of a product in specific stores or zones, use the Price Lock feature to support the stop or lock price movement of products at the store or zone level.

Prices are locked for one of two reasons:
- The price of a product needs to remain constant in one zone, but can move for other zones
- The price of a product needs to remain constant in one store, but can move for other stores

When locking the price of a product for a single store and that store is in a pricing zone, the Price Lock feature should be used in conjunction with the **Zone Override** field. This will freeze the price of one store and allow other stores in the zone to change.

For example:

Pre-optimization

Product	Store	Zone	Base Price	Locked and Zone Override?
16 oz soda	1	1	1.49	No
16 oz soda	2	1	1.49	No

16 oz soda	3	1	1.49	**Yes**

Post-optimization

Product	Store	Zone	Base Price	Locked and Zone Override?
16 oz soda	1	1	1.29	No
16 oz soda	2	1	1.29	No
16 oz soda	3	1	1.49	**Yes**

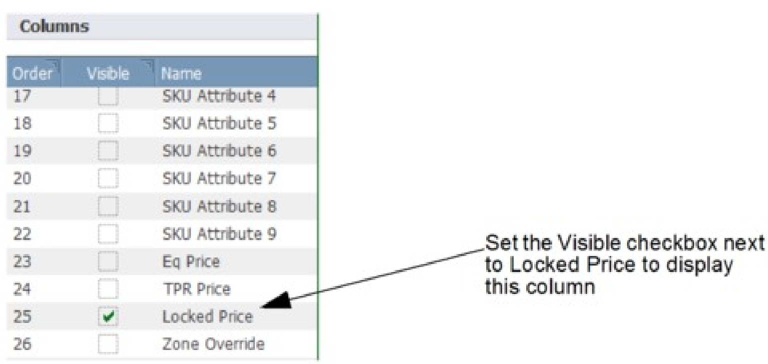
Because store #3 is locked and overrides the zone rule, the price does not move and store #3 can have a different price than other stores in the zone.

Note: If prices for a particular product in a particular store need to be exempt from the zone rules for pricing, then the Zone Override feature can be used in isolation of Price Lock. Simply choose the store within the zone that should receive an override, and then use unique price rules such as Price Product Group Limits, which can be used to apply pricing to a specific product in a specific store.

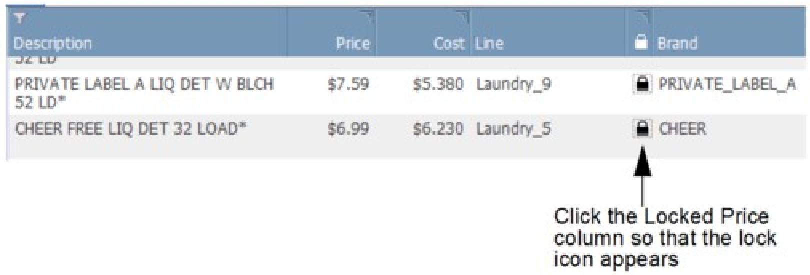
To price lock products:

Procedure

1. Choose **Data** > **Data Maintenance** to open the **Data Maintenance** page.
2. Choose the **Price/Cost** report from the **Report** drop-down menu. The **Price/Cost** report displays.
3. Click **Edit** next to the report name. The **Edit Report** page displays.
4. Set the **Visible** checkbox next to **Locked Price** to display the **Locked Price** column in the report. Set the same checkbox next to **Zone Override** to display the column in the report.



5. Click **Save**.
6. In the **Price/Cost** report, scroll to the right until the **Locked Price** column is visible.
7. For each product that you want to price lock, click in the **Locked Price** column so that the lock icon appears in the checkbox. The price will not adjust during the optimizations.



8. If you are locking prices at store level and the store is in a pricing zone, set the **Zone Override** checkbox so that the prices in the other stores in the zone change.

   Related Topics

   "Price/cost report" on page 115

   "Product analyzer utility" on page 101

Product details report

Use the **Product Details** report to view or edit the product characteristics. The report displays information such as the UPC, price, cost, line group, Brand class/family, Size class/family, Other class/family, and tier class/family at the SKU and Line aggregation levels.

At the SKU level, you can enter names of the class and family for each product. Anchored Brand classes can be viewed in the report by setting the **Is Anchor** column to display in **Edit Report** (see "Anchor class report" on page 102 for more information about anchored Brand classes and the Anchor Class rule). Prices and costs are volume-weighted averages.

If you have multiple costs available, you can edit the report to set the **Cost 1** or **Cost 2** fields to display additional cost types.

You can also set a product as pre-priced for all stores in the **Preprice** column, or view locked prices in the **Locked Price** column (indicated by a lock icon) for specific stores or zones. See "Price/cost report" on page 115 for more information about locking prices.

If you are a CP user, you can also use the **Product Details** report to view and update a product's **EQC Factor** (equivalent or "statistical" case).

In this report, you can select and right-click on a product at the SKU levels to open the **Product Relationships** tab in the Product Analyzer utility (PRA). The **Product Relationships** tab shows details for the selected product, such as Product Group information, other items in the same Line Price Group, prices and costs for that product, competitive data, and other attributes related to that product. See "Product analyzer utility" on page 101 for more information.

Related Topics

"Anchor class report" on page 102

"Price/cost report" on page 115

"Product analyzer utility" on page 101

IBM Omni-Channel Merchandising categories report

Use the **IBM Omni-Channel Merchandising Categories** report to view and edit the names of categories.

The report shows the IBM Omni-Channel Merchandising category and the customer category.

Data health report

Use the **Data Health** report to view any empty values that could prevent a successful optimization, for example, missing cost or price.

Use this report if you receive an error when you rules base price or optimize a scenario. The report will list products that are missing key information, such as equivalent units or product values. You choose an aggregation from the **Aggregation** drop-down menu to view the missing information.

Note: If products found on the **Data Health** report should be included in an optimization, contact your IBM Omni-Channel Merchandising Implementation Manager.

Product status report

Use the **Product Status** report to update the product status (active or discontinued) of products at the SKU/Store or SKU/Zone level. You can update the status in this report instead of loading new product files.

The report displays information such as the UPC, price, unit cost, product status, locked price, line group, brand class/family, and size class/family.

To change a product from active to discontinued status, click the **Prod. Status** column next to the product to display a "d" symbol, and then click **Save**. Click the "d" symbol to remove the symbol and change the product to active status.

Note: Discontinued products are filtered out of this report by default, but can be viewed by editing the **Product Status** filter in the **Edit Report** page.

In this report, you can select and right-click on a product at the SKU levels to open the **Product Relationships** tab in the Product Analyzer utility (PRA). The **Product Relationships** tab shows details for the selected product, such as Product Group information, other items in the same Line Price Group, prices and costs for that product, competitive data, and other attributes related to that product. See “Product analyzer utility” on page 101 for more information.

Related Topics

“Product analyzer utility” on page 101

Product status - time series report

If your company uses Time Series Product Status, this report will allow you to see when specified product statuses take effect by UPC, enabling you to plan your promotional activities before product become active or are sold in stores.

Each row represents a single status change for the UPC, indicating the effective date for that status change, as well as the product status that will take effect at the specified time. Each of these relationships is imported via OpenLink, as specified in "Time series product status" on page 176.

To configure Product Status information, navigate to **Data** > **Product Status Mapping**. This report allows you to create new Product Statuses or update existing statuses.

Product DC report

Use the **Product DC** report to view or edit product information by distribution center.

The report displays information such as the distribution center name, the days of inventory available for a given product at that distribution center, UPC, size, and line group.

Product salvage value report

Use the **Product Salvage Value** report to view or edit the product characteristics. The report displays information such as the UPC, price, cost, line group, brand class/family, size class/family, other class/family, and tier class/family at the SKU and Line aggregation levels.

At the SKU level, you can enter names of the class and family for each product. Prices and costs are volume-weighted averages.

The report also shows the Salvage Value percentage for each product, which is the percentage of the cost that the product is worth at the Out Date if it is not sold.

In this report, you can select and right-click on a product at the SKU levels to open the **Product Relationships** tab in the Product Analyzer utility (PRA). The **Product Relationships** tab shows details for the selected product, such as Product Group information, other items in the same Line Price Group, prices and costs for that product, competitive data, and other attributes related to that product. See "Product analyzer utility" on page 101 for more information.

Related Topics

"Product analyzer utility" on page 101

Product/store details report - long

Use the **Product/Store Details - Long** report to view or edit the product characteristics. You must have the Edit Critical Data permission to edit the columns.

The report displays information such as the UPC, price, cost, line group, brand class/family, and size class/family at the SKU/Zone, SKU/Store, Line/Store, and Line/Zone aggregation levels. Prices and costs are volume-weighted averages. For an abridged version of this report with only the SKU/Store aggregation, see "Product/store details report - short" on page 122.

The **Markdown Coefficient Code** column indicates whether modeling coefficients (such as markdown elasticity, seasonality, lifecycle, sales intercept) were borrowed from another similar product-location. A **1** in this column indicates that the coefficients were obtained from modeling; a **2** indicates that the coefficients were borrowed. A **3** indicates model coefficients with very low volume or no data in the recalibration period; a **4** indicates coefficients that could be unreliable. Stranded inventory in mature stores, or products in new stores that have scanned fewer than two times during the modeling period, do not have sufficient transaction history to be assigned coefficients during the modeling process. So that these product-locations get markdown recommendations, Markdown Optimization assigns coefficients from other product-locations. The forecasts and recommendations may not be as accurate because the average values of the borrowed coefficients are used.

By managing data in the **Markdown Price Lock** column, you can lock a specific item so that is not included in any **Markdown Plan** or **Scenario**, meaning that its price will not be affected by any optimization that you chose to employ. For example, a new version of a popular item was released recently. Your store still has the older version in its inventory and would like to sell it at a discounted price, but you do not want to discount the price of the new version of this item. By using **Markdown Price Lock**, you can lock the price of the new version of the item so that **Markdown Optimization** will not recommend any new prices for it. This feature is only available for Markdown Optimization at this time.

At the SKU/Store level, you can also view or edit the following Markdown-specific columns:

- **Markdown Start Date** - The date that the markdown starts for the product-location.
- **End Of Life Date** - The date on which the "natural" demand for the product falls to a value very close to zero. This date is defined during the modeling process and cannot be manually overridden in this report.
- **Out Date** - The final date that the product is available to sell on the store shelf. It must be earlier than the End of Life date.
- **Inventory** - Units available to sell at a location as of the inventory date. This value can be manually overridden.
- **Inventory Date -** The date on which the inventory amount is applicable.
- **Average Weekly Unit Sales** - The weekly sales volume over the last 13 weeks, or the configured time period.
- **Markdown Optimization Status** (not currently used) - The level of product markdown at the store level (Null (blank) = not on markdown; 0 = approved for markdown but not yet started; n = an integer (such as 1,2,3) indicating the iteration markdown level).
- **Customer Markdown Code** - A customer-defined flag that is used to signal Markdown Optimization that the product-location is a markdown candidate (available if received through IBM Omni-Channel Merchandising IBM OpenLink). The product picker can be configured to use this field.
- **Weeks of Supply (WOS)** - Indicator of the number of weeks of supply that are available to sell, if the product remains at the current price. It is defined as (Current Total Inventory in Units / Average Weekly Rate of Sale). You can use it to estimate available inventory at the current price.
- **Markdown Price Lock** - By selecting or clearing the check boxes in this column you can lock or unlock items.

Note: The **Inventory**, **Out Date**, **Markdown Start Date**, **Current Shelf Price**, and **Base Price** columns can also be updated in this report by importing an Excel file with Markdown data and current prices. See “Data File Formats” on page 139 in the Markdown Optimization online help or user guide for more information.

You can use the **Advanced Filter** feature for searching and filtering report items in the **Product/Store Details - Long** report. The **Advanced Filter** is a drop-down list of all of the values within each report column. You can select one or more values to include in the filter. This list is accessible from the left-click context menu for each column heading.

Related Topics

"Product/store details report - short"

Product/store details report - short

The **Product/Store Details - Short** report is an abridged version of the **Product/Store Details - Long** report. Use this version for a snapshot of price, cost, markdown, and inventory information at the SKU/Store aggregation. You must have the **Edit Critical Data** permission to edit the columns.

Because this version displays fewer columns of data at one aggregation, it may load faster than the **Product/Store Details - Long** report (see "Product/store details report - long" on page 120).

You can view or edit the following Markdown-specific columns:

- **Markdown Start Date -** The date that the markdown starts for the product-location.
- **End Of Life Date** - The date on which the "natural" demand for the product falls to a value very close to zero. This date is defined during the modeling process and cannot be manually overridden in this report.
- **Out Date** - The final date that the product is available to sell on the store shelf. It must be earlier than the End of Life date.
- **Inventory** - Units available to sell at a location as of the inventory date. This value can be manually overridden.
- **Inventory Date -** The date on which the inventory amount is applicable.
- **Average Weekly Unit Sales** - The weekly sales volume over the last 13 weeks, or the configured time period.
- **Markdown Optimization Status** (not currently used)- The level of product markdown at the store level (Null (blank) = not on markdown; 0 = approved for markdown but not yet started; n = an integer (such as 1,2,3) indicating the iteration markdown level).
- **Customer Markdown Code** - A customer-defined flag used to signal Markdown Optimization that the product-location is a markdown candidate (available if received through IBM Omni-Channel Merchandising OpenLink). The product picker can be configured to use this field.

Note: The **Inventory**, **Out Date**, **Markdown Start Date**,**Base Price** and **Current Shelf Price** columns can also be updated in this report by importing an Excel file with Markdown data and current prices. (The **Inventory**, **Out Date**, and **Markdown Start Date** columns are hidden by default). See "Data File Formats" on page 139 in the Markdown Optimization online help or user guide for more information.

You can use the **Advanced Filter** feature for searching and filtering report items in the **Product/Store Details - Short** report. The **Advanced Filter** is a drop-down list of all of the values within each report column. You can select one or more values to include in the filter. This list is accessible from the left-click context menu for each column heading (see Searching within report columns for more information).

Related Topics

“Product/store details report - long” on page 120

Sellable items report

The **Sellable Items** report displays all items by category, allowing you to review available products, as well as the relevant hierarchy of each product and its demand group characteristics. Use the **Last Scanned Date** value to see when the item was last sold according to imported data.

Deleting Products

Old products that are no longer needed for attributing can be deleted from the system either individually or in batch. Deleting large amounts in batch is useful for improving system performance. Deleted items are shown in the **Sellable Items Delete History** report.

Products can be deleted individually by right-clicking on a product in the report, and selecting **Delete**. To delete a batch of products, prepare a list of UPCs under a 'UPC' column header in a spreadsheet file, and import the file by selecting the **Bulk Delete** button in the report. The products in the file that are not currently being utilized in IBM Omni-Channel Merchandising, such as scenarios, pricing actions, promotions, markdown plans, or the Master Calendar, will be deleted from the system.

Note: You must have the **Enable Sellable Item Rename and Delete** permission to rename or delete items.

Sellable items delete history report

The **Sellable Items Delete History** report shows all items that have been deleted using the **Sellable Items** report.

For more information, see “Sellable items report.”

SKU/zone attribute report

Use the **SKU/Zone Attribute** report to assign pre-defined attributes (such as **Not Notable**, **Partially Notable, Notable**, **Ultra Notable)** at the SKU/Zone level. Notability defines the "role" a product plays in a given store.

About this task

For example, the same product can be assigned as **Notable** in one zone, and **Partially Notable** in a different zone. After assigning the attributes to products by zone, you can apply different CPIs to the sets of SKU/Zones.

A IBM Omni-Channel Merchandising Administrator will work with you to define levels of enumerated notability codes and attributes. The following example illustrates how you might assign the notability attributes to products and zones in this report.

Product	Store	Zone	Notability Attribute
Prod_A	Store 111	Zone 000	**Ultra Notable**
Prod_A	Store 222	Zone 000	**Ultra Notable**
Prod_A	Store 333	Zone 000	**Ultra Notable**
Prod_B	Store 444	Zone 000	**Notable**

Prod_B	Store 555	Zone 000	**Notable**
Prod_B	Store 666	Zone 000	**Notable**
Prod_C	Store 444	Zone 000	**Partially Notable**
Prod_C	Store 555	Zone 000	**Partially Notable**
Prod_A	Store 111	Zone 111	**Notable**
Prod_A	Store 222	Zone 111	**Notable**
Prod_A	Store 333	Zone 111	**Notable**
Prod_B	Store 444	Zone 111	**Not Notable**
Prod_B	Store 555	Zone 111	**Not Notable**

To assign SKU/Zone attributes:

Procedure

1. Choose **Data** > **Data Maintenance** to open the **Data Maintenance** page.
2. Choose the **SKU/Zone Attribute** report from the **Report** drop-down menu. The **SKU/Zone Attribute** report displays the products, zones, zone groups, and attributes.
3. For each product, click in the **Attribute** column to choose a SKU/Zone attribute from the drop-down list. The attributes will be assigned at the SKU/Zone level, and available to choose from in the **New CPI** and **Multiple CPIs** dialog boxes.

Transfer price report

The **Transfer Price** report displays metrics related to transfer prices and supports franchise pricing strategies. You can view this report using the **SKU/Zone** or **SKU/Store** aggregation. In order to view this report, you must have the **Franchise Pricing** permission.

The **Transfer Price** report uses the following metrics in addition to standard price metrics:

Metric	Description
Corporate GM%	Gross margin percentage to the franchiser *(Transfer Price - Cost) / Transfer Price*
Corporate GM$	Gross margin amount to the franchiser *Transfer Price - Cost*
Franchise GM%	Gross margin percentage to the franchisee *(Current Retail Price - Transfer Price) / Current Retail Price*
Franchise GM$	Gross margin amount to the franchisee *Current Retail Price - Transfer Price*

Franchise Store	Indicates if the store is a franchise (SKU/Store aggregation) Count of franchise stores in the zone (SKU/Zone aggregation)
Transfer Price	Price at which the corporate office sells the product to the franchisee
Transfer Price Effective Date	Date on which current transfer price took effect

Event locking settings report

Use the event locking settings report shows the default number of days for the Committed status and Locked status for all event sub-types.

Events in Promotion Planning & Execution can have time frames associated with the typical production cycle or lead time required to execute the event, such as creating a flyer. After the committed and locked time frame windows elapse, regular users cannot continue to edit these events. Only power users would be able to unlock and edit events that have passed into the restricted time frame for lockdown.

Users with the **Create Basic Events** permission can view and modify the number of days. These default numbers appear in all locations of the **Days for Committed/Locked Status** fields in the application.

Unscanned products report

Use the **Unscanned Products** report to view or edit products that are in the imported product file, but are missing price, cost, TPR, status, or POS information. You can review the products to ensure that new products are scanning (or not scanning) as expected.

Unscanned products are typically new products added to the item file for logistics or buying purposes, but are not on the shelf. Once a product has more than one week POS, the product will be removed from the list.

The **Unscanned Products** report shows the product description, UPC, and identification code assigned to the client (the user-interface application installed at your site).

VAT report

The **VAT** report shows the current VAT rates for your products at the SKU/Store level. It shows the price, cost, VAT rate, UPC, store, and zone.

Exception reports

Exception reports highlight data that is not following rules already established in the **Rules** page.

Review these reports to see the exceptions before running optimizations. If many exceptions exist, it may be costly to bring a specific category in line with the desired optimization rules. You can re-review the reports post-optimization to troubleshoot abnormal price changes.

For example, the Size rule is added to the **Rules** page stating that larger sizes must be priced 5% higher than smaller sizes while larger sizes must be a 5% better value on a per unit basis. The **Size Exceptions** report will show those products in Size Family/Class relationships which are not adhering to the rule.

If you want to make changes to items in the reports, it is best to make the changes in the relevant informational report, such as the **Brand Class and Family** report. If changes are made within an exception report at the SKU/Store level, the change will apply to only the SKU/Store and will not be propagated to the entire zone (creating another exception). You would aggregate the informational report at the Line/Zone or SKU/Zone level (if store level uniqueness does not exist).

Note: Exceptions will only display if corresponding rules have been set to **Active** in the **Rules** page (for example, no data will be displayed in the **Size Exceptions** report if the Size rule is not set to **Active** in the **Rules** page).

These are the exception reports:

- **Brand Exceptions** - Use this report to view or edit products that fall outside the Brand rules that you created. Exceptions will only appear if the Brand rule is active and spans the correct group.

  A "gap" column will be highlighted in yellow if product exceptions exist in the Brand classes compared in the Brand rule. The gap is the relationship between the products in the first and second classes in the rule. For example, **Price % GAP** is calculated as:

  [Price(1) - Price(2)) / Price(2)]

  The specific gap column (such as **Price % Gap, Price $ Gap, Eq Price % Gap, Unit GM Gap($), Unit GM Gap(%), GM% Gap)** is based on the parameters used in the Brand rule definition. For example, if the Brand rule is set with the $ range and retail price, the **Price $ GAP** columns will be highlighted if exceptions exist with the retail price gap between Brand classes specified in the Brand rule; if the Brand rule is set with the % range and retail price, the **Price % GAP** column will be highlighted in yellow if exceptions exist. The columns are available at the SKU/Store, SKU/Zone, and SKU/Chain aggregations.
- **Current Comp Retail Below Cost Exceptions** - Use this report to view or edit products with competitive prices that are below cost. The **Comp Profit** column shows the difference between the retailer's cost for the product and the competitor's price (Comp Profit = Compl/Comp Price - Unit Cost). The report is filtered based on this column, and is set to show values that are less than zero by default.
- **Current Retail Above Comp Retail Exceptions** - Use this report to view or edit products that are currently not competitive, since the current prices are above the competitive prices. This report is filtered based on the **Cur to Comp Price Diff %** column, and is set to show values greater than zero by default.
- **Current Retail Below Cost Retail Exceptions** - Use this report to view or edit products that are currently selling below cost. The **Current to Cost Diff$** column shows the difference between a product's cost and current price (Current to Cost Diff$ = Current Price - Unit Cost). The report is filtered on this column and is set to show values less than zero by default.
- **Custom Relationship Exceptions** - Use this report to view products that fall outside the Custom Relationship rule that you created. Exceptions will only appear if the Custom Relationship rule is active and spans the correct group.

  The retail price for an individual product or the group price for the Custom class will be highlighted in yellow to indicate the exceptions, based on how you defined your comparison in the Custom Relationship rule.

- **Line Exceptions** - Use this report to view or edit products whose prices do not match the rest of the products in the line group at a single store. This report lets you run a pre-optimization diagnostic analysis of line exceptions for active products. Exceptions will only appear if the Line Price rule is active and spans the correct group.
- **Other1 Exceptions** - Use this report to view or edit products that fall outside Other Class 1 rules that you created. Exceptions will only appear if the Other Class 1 rule is active and spans the correct group.

  The **Price % GAP** column will be highlighted in yellow if exceptions exist with the retail price gap between Other 1 classes specified in the Other Class 1 rule, and the **Eq Price % GAP** column will be highlighted if exceptions exist with the equivalent price gap between Other 1 classes in the rule.
- **Other2 Exceptions** - Use this report to view or edit products that fall outside Other Class 2 rules that you created. Exceptions will only appear if the Other Class 2 rule is active and spans the correct group.

  The **Price % GAP** column will be highlighted in yellow if exceptions exist with the retail price gap between Other 2 classes specified in the Other Class 2 rule, and the **Eq Price % GAP** column will be highlighted if exceptions exist with the equivalent price gap between Other 2 classes in the rule.
- **Product or Line Relationship Exceptions** - This report displays results of products in product-pairs, or line groups in pairs whose base or current prices did not conform to the Product or Line Relationship rule. Chain level summary information is included. Exceptions will only appear if the Product or Line Relationship rule is active and spans the correct group. The existing **Product to Product Relationship Exceptions** report in Scenario Results show the exceptions to the Product or Line Relationship rule after the scenario exceptions.

  The aggregations in the report are the following:
  - Line to Line - Zone
  - Line to Line - Store
  - Product to Product - Zone
  - Product to Product - Store

  The Product or Line Relationship rule sets the price of the second product/line group in a pair based on a multiplier or relative value applied to the price of the first product/line group, as shown in these equations:

  Price of UPC(2) = Price of UPC(1) x Multiplier Value

  Price of UPC(2) = Price of UPC(1) + Relative Value

  Prices in Line(2) = Prices in Line(1) x Multiplier Value

  Prices in Line(2) = Prices in Line(1) + Relative Value

  You can modify the Product or Line Relationship rule, or modify the products and values in the Data Maintenance **Product or Line Relationship** report.
- **Size Exceptions** - Use this report to view or edit products that fall outside the Size rules you created. Exceptions will only appear if the Size rule is active and spans the correct group.

  The **Price Per UOM % GAP** column will be highlighted in yellow if exceptions exist with the retail price per unit of measure (UOM) gap between Size classes specified in the Size rule.
- **Unit GM$ Compliance Exceptions** - Use this report to view products that fall outside the Unit Gross Margin$ rule that you created. The exceptions will be created if the Unit Gross Margin$ rule conflicts with other compliance rules. Exceptions will only appear if the Unit Gross Margin$ rule is active, the rule is set as a compliance rule, and it spans the correct group.

- **Zone Exceptions** - Use this report to view or edit products that fall outside the Price Zone rules you created. Exceptions will only appear if the Price Zone rule is active and spans the correct group.

To see information about multiple types of exceptions, navigate to **Data** > **Export** and select **Data Maintenance Exception Summary - SKU/Zone** from the **Report** drop-down menu. The exported spreadsheet contains counts of each type of exception in your chosen categories.

For individual exception reports, navigate to **Data** > **Export** and select **Data Maintenance Exceptions - SKU/Zone**. This will export a zip file with an exception report for each selected category. See "Exporting data" on page 181 for more information on exporting reports.

Note: Information found in the exported **Data Maintenance Exception Summary - SKU/Zone** report can also be viewed within the product interface as a scheduled report. To set up this scheduled report, navigate to **Admin** > **Task Scheduler** and create a new task. Select **Scheduled Reports** in the **Task Type** drop-down menu and **Data Maintenance Exception Summary Report** in the **Task Definition** drop-down menu.

Editing cost margins

Use this procedure to edit cost margins.

About this task

In the **Retail Cost Margin** page, imported cost margin % values can be edited and applied to one or more levels in a hierarchy: Category, Manufacturer, Brand, Product. Products will inherit the cost margins from the levels above unless they are overwritten.

Users can also override the cost margin values at a product level. Once a cost margin is overwritten at a lower level, it does not change even if the cost margins at higher levels are modified.

Procedure

1. Choose **Data** > **Retail Cost Margin** to open the **Retail Cost Margin** page.
2. You can edit the cost margin percentage in the **Cost Margin %** column for one or more levels in the hierarchy.
3. To override the cost margin values at product level, right-click on a category, and select **Update Product Level Margins**. The **Product Cost Margin Summary** page appears. The products with the category, division, manufacturer, and brand attributes will inherit the cost margin. Cost margins can also be specified for each product.
4. Click **Save** to save your changes and return to the **Retail Cost Margin** page.
5. To prevent the cost margin from being used in the calculations, set the checkbox in the **Use Cost Margin** column. For example, you may want to use the cost of the particular item that is imported through IBM Omni-Channel Merchandising OpenLink instead.
6. To manually schedule a cost calculation in the Task Scheduler, right-click on a line item in the page, and select **Schedule Cost Margin Calculation.** The Task Scheduler opens with the **Schedule Cost Margin Calculation** task automatically selected.

Chapter 6. Task scheduler

The Task Scheduler is used to manage automated tasks in the IBM Omni-Channel Merchandising services.

A task is a IBM Omni-Channel Merchandising procedure or workflow with well-defined inputs, outputs, and dependencies. Examples of tasks are modeling jobs, imports, exports, Product Status Resolver activity, and automated Price Updates. Tasks can be scheduled with start times and dates, as well as frequencies. You can also view a history of task executions.

Related Topics

"Creating new tasks"

"Editing tasks" on page 135

"Deleting tasks" on page 135

"Viewing task execution history" on page 136

Creating new tasks

Use this procedure to create new tasks. New tasks can be created and scheduled in the **Task Scheduler** page.

Procedure

1. Choose **Admin** > **Settings** > **Task Scheduler** to open the **Task Scheduler** page. The page lists all tasks by task type, task definition and description, the latest start date, the latest run status (Scheduled, Started, Running, Finished, Error), the next start date, the task status (Active, Inactive, Completed), and the user who started the task.

   Note: If the Task Scheduler service is not available, you will see an error message and will be unable to create tasks. Contact your IBM Omni-Channel Merchandising Representative for assistance.
2. Click **New Task** to open the **New Task** dialog box.
3. To define a task, select one of the following **Task Types** and **Task Definitions,** and then input the relevant **Task Details**:

Task Type...	With this Task Definition	With these Task Details
Import	**Staging Import** - Import data using the IVA framework. **Rapids** - Import bulk data using the Rapids framework.	**Description** - A description of the task used as an identifier. **Data Type** - (Applicable to Staging Import and Rapids) The type of data to be imported. **Active/Inactive** - (Common for all tasks) The schedule for the task is active if this checkbox is set. If it is cleared, the Task Scheduler will not execute the task. **Post Import Action/Simple Action** - Describes the action after the data is imported: **Approve** - Brings the imported data into the database. **Validate** - Stops after the import process after data validation.

Task Type...	With this Task Definition	With these Task Details
Export	**Promotion Forecast Export** - Exports the forecasts for unit volume at the store, product, week level. **MC Performance Detail Export** - Exports the performance details from the Master Calendar. **Enhanced MC Performance Detail Export** - Exports the performance details that belong to promotions on the Public Calendar. **Enhanced Event Details Export** - Exports the events and associated details that belong to promotions on the Public Calendar. **Event Details Export** - Exports the events and associated details that include stores and LGCs. **Promotion TPM Export** - Exports promotion details for integration with SAP TPM. **Markdown Price Export** - Exports recommended prices to stores when a scenario has been approved for implementation. **Campaign Details Export** - Not currently in use. **Package Details Export** - Exports the packages and associated details that include package header information, location groups, product groups, and product group details. **Display Planning Export** - Exports all Display Plan information from the Display Planning feature. **Custom Export** - Exports customized data types, such as Product to Product and Line to Line relationships. This is primarily used by IBM Omni-Channel Merchandising Technical Services. **Price Scenario Export** - Exports details of a Price Update. This export includes all fields from the All Prices report. **Assortment Export** - Exports Planogram-Cluster Product data, a configurable set of product attributes and metrics, Date Approved, and Cluster Details (Stores). Also includes an optional Cluster-Store file that lists the mappings of stores to clusters. Exports all scenarios that have been marked for approval.	**Description** - A description of the task used as an identifier. **Active/Inactive** - (Common for all tasks) The schedule for the task is active if this checkbox is set. If it is cleared, the Task Scheduler will not execute the task. **Export Task Definition** - Customized export task definitions. **Incremental export or full export** - Incremental exports will export only elements that have changed since the last export. Full export will export all elements. **Aggregate at geography level or national level** - Level at which forecasts are exported. **Export File Directory** - Directory where the exported file is stored. **Export File Compression Threshold** - Threshold for compression specified in bytes. Exported files that are bigger than the threshold are compressed and stored in the export directory. **Markdown Only:** **Export Recommendation Period** - Exports recommended prices from either the current week or the current to last week. **Price Recommendation** - Exports all price recommendations or only the price recommendations which changed from the previously exported prices. **Export Markdown Price Threshold** - A threshold value for exporting new recommended prices compared to the previously exported recommended prices. For example, a value of 0.10 means that the difference between the previous and current recommendations should be at least 10 cents. Exclude Already Exported Recommendation - If set to Yes, excludes any recommended prices that have already been exported. If set to **No**, any recommended prices that have already been exported will be re-exported.
Price Delivery	**Base Price Delivery** - Base prices for stores and products at the division level. **Base Price Delivery (zone level)** - Base prices at the zone level. **Express Pricing** - Exports express prices directly to stores outside of the regular scenario process. **Express Pricing (zone level)** - Reads from zone-level export tables to produce an express price export file **Transfer Price** - Produces an export file containing transfer prices **Base and Transfer Price** - Produces an export file containing base prices and transfer prices **Custom Delivery** - Used internally.	**Description** - A description of the task used as an identifier. **Active/Inactive** - (Common for all tasks) The schedule for the task is active if this checkbox is set. If it is cleared, the Task Scheduler will not execute the task. **Division** - The division for the process.

<table>
<tr><th>Task Type...</th><th>With this Task Definition</th><th>With these Task Details</th></tr>
<tr><td>Scenario and Data Maintenance</td><td>Price Scenario Delete - Deletes unused and outdated scenarios in Everyday Price Optimization and Everyday Price Management.

Competitor Data Delete - Clears out old competitor data from the database that is older than a specified number of days.

Scenario Archive - Archives scenarios that are older than a specified number of days to improve system performance (180 days is recommended). The following types of scenarios are not included in the archive:
• Production scenarios
• The last scenario run for a category-division
• Scenarios marked as “Keep”
• Permanently deletes scenarios that are in Pending Delete status (Scenario Purge)</td><td>Description - A description of the task used as an identifier.

Active/Inactive - (Common for all tasks) The schedule for the task is active if this checkbox is set. If it is cleared, the Task Scheduler will not execute the task.

Category - The category for the process.

Division - The division for the process.

Competitor - The specific competitor(s) for the competitor data soft delete.

Older Than (# of days) - The number of days (taken from the scenario run date) after which the data will be deleted.</td></tr>
<tr><td>Price Maintenance</td><td>Price Update - Runs a process that looks for data changes and then executes a Price Update. These are the primary types of data changes that can trigger a Price Update:
• New vendor costs
• New competitive information
• New Compliance
• New products
• New VAT rates
• Zone structure

Recalculate - Recalculates scenarios for which IBM Omni-Channel Merchandising has auto-imported price override data. These scenarios have a status of Recalculate! Optimized prices have been changed and belong to the category and division selected for the task.

Rules Price - Schedules the rules pricing process for Rules Based Pricing scenarios, detecting changes and automatically running rules pricing.

Price Approval - marks all scenarios as Approved for Export if they have not been exported, and are visible on the Production Price Approval screen. To be notified when products are automatically approved, subscribe to the Automated Price Approval Task Status alert.</td><td>Description - A description of the task used as an identifier.

Active/Inactive - (Common for all tasks) The schedule for the task is active if this checkbox is set. If it is cleared, the Task Scheduler will not execute the task.

Category - The category for the process. Categories can be multi-selected using Ctrl-click, or Shift-click to select multiple adjacent categories.

Division - The division for the process.

Data Type (Optional) - The data files that must be loaded via IBM Omni-Channel Merchandising OpenLink before a Price Update is run. If a data file for a category/division fails to load, an email notification is sent. The process will run for the category/divisions with successfully loaded data.</td></tr>
<tr><td>Product Status Calculation</td><td>Product Status Resolver - Runs the PSR process to impute the status at the store-product level based on the sales history.

Product Statistics Summary- Runs a process to calculate various Summary Statistics from the sales data.

Opt Product Statistics - Runs a process to calculate the average price and cost at the product level, and the active products with modeling coefficients at the store level. This should be run prior to linking stores.</td><td>Description - A description of the task used as an identifier.

Active/Inactive - (Common for all tasks) The schedule for the task is active if this checkbox is set. If it is cleared, the Task Scheduler will not execute the task.

Category - The category for the process. Categories can be multi-selected using Ctrl-click, or Shift-click to select multiple adjacent categories.</td></tr>
<tr><td>Workflow</td><td>OpenLink Workflows - Workflows to automatically load the data, such as product, cost, and location, in the correct sequences.

OpenLink Auto Data Load - Allows inbound data to be loaded automatically soon after the data files arrive at a pre-configured frequency. This workflow eliminates the need to schedule data load processes or other workflows based on the time when data files are expected to arrive.

Note: You must have the Enable OpenLink Auto Data Loading permission to enable this task.</td><td>Description - A description of the task used as an identifier.

Active/Inactive - (Common for all tasks) The schedule for the task is active if this checkbox is set. If it is cleared, the Task Scheduler will not execute the task.

Workflow - The workflow for the process.

Poll Interval (in minutes) - The frequency at which the workflow will search the file system for new data files. It is recommended that the poll interval be set at 10 minutes or greater.

Poll Duration (in hours) - The length of time that the workflow will poll for new data files. This parameter is used to confine all data loads to a fixed time frame.</td></tr>
</table>

Task Type...	With this Task Definition	With these Task Details
Modeling	**Modeling Task** - Runs a modeling job.	**Description** - A description of the task used as an identifier. **Active/Inactive** - (Common for all tasks) The schedule for the task is active if this checkbox is set. If it is cleared, the Task Scheduler will not execute the task. **Product Category** - The category for the process. **Base Modeling Job** - Modeling job associated with the product category. Every recurrence will be a copy of the base modeling job.
Optimization	**Markdown Re-optimization** - Runs a Markdown re-optimization.	**Description** - A description of the task used as an identifier. **Active/Inactive** - (Common for all tasks) The schedule for the task is active if this checkbox is set. If it is cleared, the Task Scheduler will not execute the task. **Category** - The category for the process. **Division** - The division for the process.

Task Type...	With this Task Definition	With these Task Details
Others	**Notification Summary** - Accumulates email messages and sends them to users in batch either daily or weekly. **Event Time Based Locking** - Runs a process that locks events that have exceeded their lock thresholds. **Model Health Calculation** - Runs a model health calculation for all categories. This updates the Model Health report. **TLog MBI Calculation** - Runs a calculation for the market basket metrics. This updates the MBI metrics in the Market Basket Insights report in the home page and in the Promotion Optimization product picker. It uses transaction log data that has been pre-processed and validated by IBM Omni-Channel Merchandising OpenLink. This task should be configured to run once a week. **CompPrice Rollover** - Loads competitive prices from Competitive Price History datastore into zone-level competitive price entries. **Auto-Assign New Products** - Runs a process for assigning existing Demand Groups to new products in IBM Omni-Channel Merchandising OpenLink. You can run it for all categories (default), or for one or more selected categories in the Category drop-down menu. **Margin Based Cost Calculation** - Runs a process for calculating costs from user-defined cost margins for products. **Markdown Plan Scenario Purge** - Permanently deletes Markdown plans and scenarios that have been soft-deleted in Markdown Optimization. **Expand Store Distribution** - Copies modeling coefficients for new products from existing stores to new stores so that they can receive forecasts across the full set of stores in the Promotion Optimization application. New products have no history in the new stores for estimating the modeling coefficients used for the forecasts. Note: You must have the Enable Copy Coefficients Across Stores Task permission to enable this task. **Expand Store Distribution for CP** - Copies modeling coefficients for new products from existing locations to new locations so that they can receive forecasts in the Promotion Optimization application. Note: You must have the **Enable Copy Coefficients Across Stores Task** permission to enable this task. **Collision Detection** - Used to run collision detection checks on a regular basis, validating that there are no collisions between items on the Team and Public Calendars. **Data Import Monitor** - Checks recent data imports to be sure that they fall within expected ranges for size and load time. It also checks for abnormal data loads and missing files, sending an alert as appropriate if there are errors. **Display Plan Validation** - Checks to make sure that Display Plan characteristics do not collide, providing alerts as appropriate if there are errors. **Event Validation** - Detects whether collisions occur between events created in Event Planning, providing alerts as appropriate if there are errors. **Marketing Calendar Aggregation** - Pre-aggregates forecast and actual data for events created in Event Planning, making those calculations available during future planning.	**Description** - A description of the task used as an identifier. **Active/Inactive** - (Common for all tasks) The schedule for the task is active if this checkbox is set. If it is cleared, the Task Scheduler will not execute the task. **Category** - (Applicable to Auto-Assign DGs) The categories for which Demand Groups will be assigned to their new products. **Markdown Only:** **Date Type** - If Plan Start Date is chosen, all plans with a Plan Start Date earlier than the specified Cutoff Date value will be deleted. If Plan End Date is chosen, all plans with a Plan End Date earlier than the specified Cutoff Date value will be deleted. **Cutoff Date** - The cut off date (in MM/DD/YYYY format) for deleting the plans. All plans with either a Plan Start Date or Plan End Date earlier than this date will be deleted.

Task Type...	With this Task Definition	With these Task Details
Promotion Data Maintenance	**Promotion Purge** - Permanently deletes promotions that have been soft-deleted in Promotion Management and Optimization. **Auto Predict Promotions** - You can choose to automatically predict promotions by date range, calculation status, workflow status, and category. You can specify the schedule on which you would like the auto-prediction to run. You can also re-predicts promotions to apply updates such as re-modeling of categories or re-calibration of models. This task will re-predict promotions that satisfy certain conditions. In the Task Scheduler, enable promotions that are on the Public Calendar to qualify for auto-prediction using the following conditions: • Select promotions to auto-predict by workflow status. You can select any combination of the following statuses: – Draft – On Public Calendar – On Team Calendar – On Team and Public Calendar • Define a time window for the dates of promotions that will be auto-predicted. For example, you can specify an auto-prediction of all promotions set to begin between six and eight weeks from today's date. This would prevent auto-prediction for promotions set to begin within the next six weeks. • Set the end date and time to end an auto-prediction. The Promotion Task Scheduler options are controlled through the system settings. Contact your IBM representative for more information about the system settings. **UEF Allocation Purge** - Permanently deletes UEF allocations that have been soft-deleted in Promotion Management and Optimization. **Location Group Class Purge** - Permanently deletes Location Group Classes that have been soft-deleted in Promotion Management and Optimization. **Promoted Price Conflict Report** - Runs the Promoted Price Conflict Report. **Update Product Count** - Updates product count to reflect the most current count. **Promotion PosDaily Purge** - Permanently deletes Daily POS data that has been soft-deleted in Promotion Management and Optimization. **Promotion Product Category Purge** - Permanently deletes Product Categories that have been soft-deleted in Promotion Management and Optimization.	

4. You can schedule a task to occur once at a specified time, time zone, and on a specified date, or you can create a recurring schedule by specifying the frequency of recurrence, the time of the recurrences, and the range of recurrences.

   These are the **Range of Recurrence** options:
   - **No end** - The task will recur forever (default).
   - **End after** - The task will complete and will no longer be active after the specified number of occurrences.
   - **End by** - The task will complete and will no longer be active after the specified date. The end by date should not be earlier than the start date.

A recurrence has the following restrictions to prevent unused tasks from slowing system performance:
- The recurrence of a custom task cannot be greater than 59 minutes.
- The recurrence of an hourly task cannot be greater than 23 hours.
- The recurrence of a daily task cannot be greater than 6 days.
- The recurrence of a monthly task cannot be greater than 11 months.

Note that there is no recurrence limitation for Weekly and Yearly tasks.

Note: A weekly task will only execute on one day per week, for example, every Monday. If you must schedule a weekly task to run on more than one day of the week, a task for each day must be created.

5. Click **Save** when you are done entering the task details. The new task will appear in the **Task Scheduler** page.

Related tasks:

"Approve for Export" on page 70

Related Topics

"Editing tasks"

Deleting tasks

Use this procedure to delete tasks.

About this task

An existing task can be deleted if it is scheduled to start or it has already started. The task will be removed from the **Task Scheduler** page.

Procedure

1. Choose **Admin** > **Settings** > **Task Scheduler** to open the **Task Scheduler** page.

   Note: If the Task Scheduler service is not available, you will see an error message and will be unable to delete tasks. Contact your IBM Omni-Channel Merchandising Representative for assistance.
2. Select a task.
3. Select **Delete**.
4. Click **Yes** in the confirmation message that appears. The deleted task is removed from the **Task Scheduler** page.

Editing tasks

Use this procedure to edit tasks.

About this task

An existing task can be edited if the task status is **Active**. You edit a task in the **Task Scheduler** page.

Procedure

1. Choose **Admin** > **Settings** > **Task Scheduler** to open the **Task Scheduler** page.

Note: If the Task Scheduler service is not available, you will see an error message and will be unable to edit tasks. Contact your IBM Omni-Channel Merchandising Representative for assistance.

2. Select a task, right-click, and select **Details** to open the **Edit Task** dialog box.
3. You can edit your selections for the **Task Type** and **Task Definition**. You cannot change the start date of a schedule for a task if the task was executed one or more times. The number of occurrences cannot be less than or equal to the number of times that the task has already executed on the schedule.
4. Click **Save** when you are done with your edits. The edited task will appear in the **Task Scheduler** page.

Viewing task execution history

Use this procedure to view a task execution history.

About this task

You can view a history of the task executions, including the start time, job status, and the user who started the task.

Procedure

1. Choose **Admin** > **Settings** > **Task Scheduler** to open the **Task Scheduler** page.
2. Select a task.
3. Select **Execution History** to open the **Task Execution History** dialog box. The summary at the top shows the task type, description, task definition, and frequency of the task. All the executions of the task are listed, including the start time, run status, and the user who started the task.

Chapter 7. Importing and exporting data

Data can be imported into the IBM Omni-Channel Merchandising services and exported to an Excel file to review or edit. You can also track the status of all imports and exports.

Related Topics

"Importing data"

"Data File Formats" on page 139

"Checking import status" on page 180

"Exporting data" on page 181

"Checking export status" on page 182

"Deleting an export" on page 182

Importing data

Use this procedure to import data. Data is imported into the IBM Omni-Channel Merchandising services in one of three ways.

Procedure

1. Received through the IBM Omni-Channel Merchandising OpenLink application. This is the most common method for importing new data. Customers send their data (in text **.txt** files) to IBM Omni-Channel Merchandising each week (through FTP) for sales, locations, products, competitive prices, and product cost changes. This data is received in IBM Omni-Channel Merchandising OpenLink, which uses automated validations to ensure data cleanliness. There is very little manual, or user, intervention in these files. The imported files are monitored using the **Import Dashboard** report in IBM Omni-Channel Merchandising OpenLink.

   Larger sets of data should be sent through IBM Omni-Channel Merchandising OpenLink to take advantage of automated data accuracy screening. IBM Omni-Channel Merchandising OpenLink is a tool used to prevent inaccurate or corrupted data from entering the applications. The data is put into a standard format and then validated. The validation checks for errors, and flags the errors. The errors are fixed, and validation is run again. The final output from this process is clean and accurate data.

   Note: When new vendor costs or competitive prices come in through IBM Omni-Channel Merchandising OpenLink and exceed thresholds, they are sent to the **New Data Approval** page in the pricing application and must be manually approved.
2. Directly into IBM Omni-Channel Merchandising services using Excel Spreadsheets or DB IV formats, such as Microsoft Access. This is usually done after your data has been imported for editing purposes, or for importing small amounts of new data. Note that importing data directly from an Excel spreadsheet mitigates IBM Omni-Channel Merchandising OpenLink automated data validations. See "Using Excel spreadsheets" on page 138 for more information.

Note: When data is imported using a IBM Omni-Channel Merchandising service other than IBM Omni-Channel Merchandising OpenLink, the only validation is to see if the data file conforms to the standard format. As a result, you can potentially import invalid or bad data. Make sure you check the data thoroughly before importing through a IBM Omni-Channel Merchandising service. You will typically export data from the application, edit the data, and then import it back in.

3. Directly into the IBM Omni-Channel Merchandising **Data Maintenance** page using editable fields in **Data Maintenance** reports. For example, if you receive new vendor cost or new competitive data which requires immediate implementation, the new data can be entered directly into the **Price/Cost** or **Competitive Products** report in the **Data Maintenance** page. See "Data maintenance reports" on page 97 for more information.

Related Topics

"Using Excel spreadsheets"

Using Excel spreadsheets

Using Excel spreadsheets is a quick and easy method for importing records directly into IBM Omni-Channel Merchandising services.

After you manually input records in an Excel spreadsheet, you import the spreadsheet. The data is viewable in the **Data Maintenance** reports and other reports, such as **Product Groups** or **Store Groups**.

Data can be inserted, which adds new data to the database, or it can be updated, which changes data already in the database.

You may not have access to all data imports. You may only be able to import specific sets of data, or none at all. You must have the **Import data to applications** user permission to import data from an Excel file into the application.

Related Topics

"Creating a spreadsheet example"

Creating a spreadsheet example

Example of an excel spreadsheet.

In an Excel spreadsheet, you enter the column names and data as described in the table in "Data File Formats" on page 139. In most cases, you will create a separate spreadsheet for each data type, such as Store Groups. After it is complete, you import it into IBM Omni-Channel Merchandising services to populate the reports, as described in "Importing data" on page 137.

The following example shows the spreadsheet data columns for the Multiple Price Points data type. In this case, any price between .48 and .52 would automatically recommend 2 for $1.00. IBM Omni-Channel Merchandising will automatically calculate the per-selling-unit price point as .50.

ProductCategory	MinUnitPrice	MaxUnitPrice	Multiple	PricePoint
Coffee 1	0.48	0.52	2	1

Related Topics

"Data File Formats"

"Importing data" on page 137

Additional spreadsheet tips

Here are some additional tips for creating spreadsheets.

- Category names used in the spreadsheet must match the category names in the pricing application, including cases (upper and lower case). Check the category names in IBM Omni-Channel Merchandising (**Edit** > **Data Maintenance**, choose the **IBM Omni-Channel Merchandising Categories** report) before importing.
- Enter the field names in the top row of the data file. The top row of data is ignored during import.
- Every column must be present in the data file. If you are not importing a column, leave it empty, but still include it in the file.
- Records can be deleted by placing a blank in the column.
- Custom formatted data cells will not import.
- Many of the field names are followed by another name in parenthesis (Store Number (CustomerLocationKey)). The name without parentheses is the name of the field that appears in the IBM Omni-Channel Merchandising service. The name in the parentheses is the actual field name that appears in the database. If there are no parentheses following the name, it is the name used in the database, as well as the service.

Data File Formats

Each data type has a specific set of fields that the file must contain. Also, the column order must be in a specific order.

Each data type that you can import is listed in the table below with the required fields, column order, unique key, and type of import that can occur (update data, insert new data, or both). For example, for some data types, only new data can be inserted. Records that are currently in a IBM Omni-Channel Merchandising service will not be updated for those data types. The IBM Omni-Channel Merchandising service that requires the data type is also included.

Some fields require a single quote (') before the value to save it in text format in Excel. When you enter a code such as UPC code "000012345678", Excel tries to clean up the data by removing the leading zeros. The resulting value would be "12345678". This would fail in the IBM Omni-Channel Merchandising system because each character is required for UPC codes. Fields that require a single quote (') before the value are noted in the table.

Data Type	Available Actions	IBM Omni-Channel Merchandising Service
Ad execution defaults - product group	Update default headline copy, body copy and images for an existing product group	• Promotion Planning & Execution
Ad execution defaults - promoted product group	Update default headline copy, body copy and images for an existing promoted product group	• Promotion Planning & Execution
Anchor class	Update existing records	• Price Management • Price Optimization
Anchor price	Update existing records	• Price Management • Price Optimization
Anchor price by zone	Update existing records	• Price Management • Price Optimization
Base cost1	Update existing records	• Price Management • Price Optimization
Base cost1 by zone	Update existing records	• Price Management • Price Optimization
Base cost2	Update existing records	• Price Management • Price Optimization
Base cost2 by zone	Update existing records	• Price Management • Price Optimization
Base cost3	Update existing records	• Price Management • Price Optimization
Base cost3 by zone	Update existing records	• Price Management • Price Optimization
Base costs	Update existing records	• Price Management • Price Optimization • Markdown Optimization • Promotion Planning & Execution • Customer Trade Planning
Base costs by zone	Update existing records	• Price Management • Price Optimization • Promotion Planning & Execution • Customer Trade Planning
Base prices	Update existing records	• Price Management • Price Optimization • Markdown Optimization • Promotion Planning & Execution • Customer Trade Planning

Data Type	Available Actions	IBM Omni-Channel Merchandising Service
Base prices by zone	Update existing records	• Price Management • Price Optimization • Markdown Optimization • Promotion Planning & Execution • Customer Trade Planning
Base to Bonus Products Map	Update existing records	• Price Management • Price Optimization
Brand class and family	Update existing records	• Price Management • Price Optimization
Brand rule override	Update existing records	• Price Management • Price Optimization
Category group	Update existing records	• Price Management • Price Optimization
Category-zone competitors	Insert new records Update existing records	• Price Management • Price Optimization
Competitive prices	Insert new records Update existing records	• Price Management • Price Optimization • Promotion Planning & Execution • Customer Trade Planning
Comp prices by zone	Insert new records Update existing records	• Price Management • Price Optimization • Promotion Planning & Execution • Customer Trade Planning
Comp prices by zone - line	Insert new records Update existing records	• Price Management • Price Optimization
Cost configuration - line/zone	Update existing records	• Price Management • Price Optimization
Cost configuration - SKU/chain	Update existing records	• Price Management • Price Optimization
Cost configuration - SKU/division	Update existing records	• Price Management • Price Optimization
Cost family	Update existing records	• Price Management • Price Optimization
Cost margin (for CP customers)	Update existing records	• Price Management • Price Optimization • Customer Trade Planning

Data Type	Available Actions	IBM Omni-Channel Merchandising Service
Current prices	Update existing records	• Price Management • Price Optimization • Markdown Optimization
Current prices by zone	Update existing records	• Price Management • Price Optimization • Markdown Optimization
Custom relationships	Update existing records	• Price Management • Price Optimization
Express price overrides by store - SKU	Update existing records	• Price Management • Price Optimization
Express price overrides by zone - line	Update existing records	• Price Management • Price Optimization
Express price overrides by zone - SKU	Update existing records	• Price Management • Price Optimization
Last digits	Insert new records Update existing records	• Price Management • Price Optimization
Line prices	Update existing records	• Price Management • Price Optimization • Promotion Planning & Execution • Customer Trade Planning
Line to line relationship	Update existing records	• Price Management • Price Optimization
Line to line relationship by zone	Update existing records	• Price Management • Price Optimization
Location group class assignment	Update existing records	• Promotion Planning & Execution • Customer Trade Planning
Location group class store mappings	Update existing records	• Promotion Planning & Execution • Customer Trade Planning
Locked prices	Update existing records	• Price Management • Price Optimization
Locked prices by division	Update existing records	• Price Management • Price Optimization
Locked prices by zone	Update existing records	• Price Management • Price Optimization
Markdown data	Update existing records	• Markdown Optimization
Multiple price points	Insert new records	• Price Management • Price Optimization

Data Type	Available Actions	IBM Omni-Channel Merchandising Service
Other class and family1	Update existing records	• Price Management • Price Optimization
Other class and family2	Update existing records	• Price Management • Price Optimization
Pre-prices flag	Update existing records	• Price Management • Price Optimization • Promotion Planning & Execution • Customer Trade Planning
Price overrides	Update existing records	• Price Management • Price Optimization
Price overrides - line	Update existing records	• Price Management • Price Optimization
Price overrides by zone	Update existing records	• Price Management • Price Optimization
Price overrides by zone - line	Update existing records	• Price Management • Price Optimization
Product group	Insert new records	• Price Management • Price Optimization • Markdown Optimization • Promotion Planning & Execution • Customer Trade Planning
Product link	Update existing records	• Price Management • Price Optimization • Promotion Planning & Execution • Customer Trade Planning
Product status	Update existing records	• Price Management • Price Optimization • Markdown Optimization • Promotion Planning & Execution • Customer Trade Planning
Product status by zone	Update existing records	• Price Management • Price Optimization • Markdown Optimization • Promotion Planning & Execution • Customer Trade Planning
Product to product relationship	Update existing records	• Price Management • Price Optimization

Data Type	Available Actions	IBM Omni-Channel Merchandising Service
Product to product relationship by zone	Update existing records	• Price Management • Price Optimization
Promoted product group - LU	Create new promoted product groups Add new logistical units to existing product groups	• Promotion Planning & Execution
Promoted product group - SU	Create new promoted product groups Add products to existing promoted product groups	• Promotion Planning & Execution
Size class and family	Update existing records	• Price Management • Price Optimization
SKU attributes	Update existing records Update existing records with null values	• Price Management • Price Optimization
SKU/Zone attribute	Update existing records with a maximum of six (6) attributes	• Price Management • Price Optimization
Store attributes	Update existing records Update existing records with null values	• Price Management • Price Optimization
Store group	Insert new records	• Price Management • Price Optimization • Markdown Optimization • Promotion Planning & Execution • Customer Trade Planning
Store price zone	Update existing records	• Price Management • Price Optimization • Markdown Optimization
Tier class and family	Update existing records	• Price Management • Price Optimization
Transfer prices by store	Add or modify transfer price for an existing UPC	• Price Management • Price Optimization
Transfer prices by zone	Add or modify transfer price for an existing UPC	• Price Management • Price Optimization
Zone exception	Update existing records	• Price Management • Price Optimization
Zone group assignment	Insert new records Update existing records	• Price Management • Price Optimization • Markdown Optimization

Data Type	Available Actions	IBM Omni-Channel Merchandising Service
Zone override	Update existing records	• Price Management • Price Optimization
Zone-location mapping	Update existing records	• Price Management • Price Optimization • Markdown Optimization

ABC product direct costs

ABC product direct costs data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before value 20 digit UPC code
Customer Location Key	Required, use single quote (') before value Store number or identifier
Distribution Center Key	Required, unique key, use single quote (') before value Distribution center number or identifier
AvgWklyCase	Average number of weekly cases handled by a distribution center
BagCost	Total shopping bag cost for a product in a distribution center's region
Checkout Cost Per Pkg	Cost per package to complete a checkout
DC Inv Cost Per Pkg	Inventory cost per package at a distribution center
DC Labor Cost Per Pkg	Labor cost per package at a distribution center, given the receiving method
SumOfAvgWklyCase	Sum of the average number of weekly cases handled by the distribution center
Count Location	Number of distribution centers
AvgOfDCInvDays	Average number of inventory days
AvgOfCaseCube	Average number of case cubes
DC Space	Calculation of inventory days and number of case cubes
DC Cube	Average amount of space occupied by a given cube at the distribution center
DC Space Cost Per Store	Calculates the space cost of servicing a store depending on the product storage type
HQ Inv Proc	Invoice processing cost divided by product case pack
AvgDeliveryFreq	Average of the location delivery frequency
AvgCaseCube	Average of product case cube
Location Cube	Calculation of product case cube, average weekly case, and location delivery frequency

Ad execution defaults - product group

Ad Execution Defaults - Product Group data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
Product Group Name	Required; if the product group specified does not exist, the row does not import. Name of product group
Product Group Code	20 character maximum Code for the product group
Category ID	Identification number for the product category
Headline Copy	Required; if left blank, IBM Omni-Channel Merchandising deletes any existing default. Default headline copy for the product group
Body Copy	Required; if left blank, IBM Omni-Channel Merchandising deletes any existing default. Default body copy for the product group
Image 1	Required; if left blank, IBM Omni-Channel Merchandising deletes any existing default. Default image for the product group
Image 2	Required; if left blank, IBM Omni-Channel Merchandising deletes any existing default. Default image for the product group
Image 3	Required; if left blank, IBM Omni-Channel Merchandising deletes any existing default. Default image for the product group

Ad execution defaults - promoted product group

Ad execution defaults - promoted product group data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
Product Group Name	Required; if the promoted product group specified does not exist, the row does not import. Name of promoted product group
Product Group Code	20 character maximum Code for the product group
Headline Copy	Required; if left blank, IBM Omni-Channel Merchandising deletes any existing default. Default headline copy for the promoted product group

Data Column (in order from first to last)	Description
Body Copy	Required; if left blank, IBM Omni-Channel Merchandising deletes any existing default. Default headline copy for the promoted product group
Image 1	Required; if left blank, IBM Omni-Channel Merchandising deletes any existing default. Default image for the product group
Image 2	Required; if left blank, IBM Omni-Channel Merchandising deletes any existing default. Default image for the product group
Image 3	Required; if left blank, IBM Omni-Channel Merchandising deletes any existing default. Default image for the product group

Anchor class

The imported set of brand families and brand classes populates the **Anchor Class** report. Only one brand class under the same brand family can be the anchor class. If more than one brand class is set as the anchor in the import file, the anchor class defined last will override the ones previously defined. Anchor class data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
Product Category (ProductCategory)	Required Product category to which the competitor data will apply
Brand Family (BrandFamily)	Use single quote (') before the value Brand family name
Brand Class (BrandClass)	Use single quote (') before the value Brand class name
IsAnchor	**1** means the brand class is anchored; **0** means the brand class is not anchored

Anchor price

The imported set of anchor prices populates the **Anchor Price** report. Any existing anchor prices for all products and stores in the category will be overwritten. Anchor price data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code

Data Column (in order from first to last)	Description
Store Number (CustomerLocationKey)	Required, use single quote (') before the value Store number or identifier
Anchor Price	Anchor prices are a set of prices for a category that you can create a Price Drift rule against. This rule constrains the price to be within a certain range from the anchor price.

Anchor price by zone

The imported set of anchor prices populates the **Anchor Price** report. Any existing anchor prices for all products and stores in the category will be overwritten. Anchor price by zone data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Division	Required Division name
Zone	Required Zone name
Anchor Price	Anchor prices are a set of prices for a category that you can create a Price Drift rule against. This rule constrains the price to be within a certain range from the anchor price.

Base cost1

Base Cost1 data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Store Number (CustomerLocationKey)	Required, use single quote (') before the value Store number or identifier
Base Cost1	Unit cost of product (user-defined)

Base cost1 by zone

Base Cost1 by zone data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Division	Required Division name
Zone	Required Zone name
Base Cost1	Unit cost of product (user-defined)

Base cost2

Base Cost2 data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Store Number (CustomerLocationKey)	Required, use single quote (') before the value Store number or identifier
Base Cost2	Unit cost of product (user-defined)

Base cost2 by zone

Base Cost2 by zone data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Division	Required Division name
Zone	Required Zone name
Base Cost2	Unit cost of product (user-defined)

Base cost3

Base Cost3 data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Store Number (CustomerLocationKey)	Required, use single quote (') before the value Store number or identifier
Base Cost3	Unit cost of product (user-defined)

Base cost3 by zone

Base Cost3 by zone data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Division	Required Division name
Zone	Required Zone name
Base Cost2	Unit cost of product (user-defined)

Base costs

Base Costs data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Store Number (CustomerLocationKey)	Required, use single quote (') before the value Store number or identifier
Avg Unit Cost (UnitCost)	Unit cost of product

Base costs by zone

Base Costs by zone data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code

Data Column (in order from first to last)	Description
Division	Required Division name
Zone	Required Zone name
Avg Unit Cost (UnitCost)	Unit cost of product

Base prices

Base Prices data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Store Number (CustomerLocationKey)	Required, use single quote (') before the value Store number or identifier
Multiple	Required Multiple amount; for example, if product is 3 for $1, you would enter **3** in this column.
MultiplePrice	Required Multiple price; for example, if product is 3 for $1, you would enter 1 in this column.

Base prices by zone

Base Prices by zone data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Division	Required Division name
Zone	Required Zone name
Multiple	Required Multiple amount; for example, if product is 3 for $1, you would enter **3** in this column.
MultiplePrice	Required Multiple price; for example, if product is 3 for $1, you would enter 1 in this column.

Brand class and family

Brand class and family data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Brand Class (BrandClass)	Use single quote (') before the value Brand class name
Brand Family (BrandFamily)	Use single quote (') before the value Brand family name

Brand rule override

Brand rule override data columns and descriptions are listed here.

Use this import to override brand rules for specific product pairs.

Data Column (in order from first to last)	Description
Name	Required, use single quote (') before the value Name of the brand rule you are overriding for these two products
Description	Description of the rule
Product Category (ProductCategory)	The specific product category to which the products belong. To specify "all categories," use null.
Parent Brand Rule (ParentBrandRule)	Name of the parent brand rule (found in the Price Rules page)
LeftUPC	Required 20 digit UPC code
RightUPC	Required 20 digit UPC code
Brand Rule % Lower (MinValue)	Required Lower bound amount for the price range
Brand Rule % Upper (MaxValue)	Upper bound amount for the price range

Category group

Category group data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
Category Group	Use single quote (') before the value Category Group name
Product Category (ProductCategory)	Product category in the Category Group

Category-zone competitors

Category-zone competitors data columns and descriptions are listed here.

You must first enter the competitor names in the **Competitors** page before importing.

Data Column (in order from first to last)	Description
Division	Required Division Name
Product Category (ProductCategory)	Required Product category to which the competitor data will apply
Zone Group	Zone group name
Zone	Required Zone name
Primary Competitor (Primary Comp)	Required, unique key Primary competitor name or ID
Secondary Competitor (Secondary Comp)	Required, unique key Secondary competitor Name or ID
Tertiary Competitor (Tertiary Comp)	Required, unique key Tertiary competitor name or ID

Competitive prices

You must enter the competitor names in the **Competitors** page before importing. This data set is also used for the compliance prices. Competitive prices data columns and descriptions are listed here.

If the prices are blank in the Excel file, and the records exist for the given UPC/Store/Competitor, IBM Omni-Channel Merchandising deletes the competitive information from the application upon import. A warning message will alert you that the records will be deleted.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Store Number (CustomerLocationKey)	Required, unique key, use single quote (') before the value Customer store number or identifier • Multiple (SuggestedMultiple)- multiple amount. For example, if product is 3 for $1, you would put 3 in this column. • MultiplePrice • (PriceType)- SHELF or 0. Use a single quote (') before the type. • StartDate - effective start date of the competitive price you are importing

Data Column (in order from first to last)	Description
Competitor (CompetitorKey)	Required, unique key Competitor Name or ID
Multiple (SuggestedMultiple)	Multiple amount; for example, if product is 3 for $1, you would put 3 in this column.
MultiplePrice	Multiple price; for example, if product is 3 for $1, you would enter 1 in this column.
(PriceType)	Use single quote (') before the value Enter SHELF or 0
StartDate	Effective start date of the competitive price you are importing

Comp prices by zone

You must enter the competitor names in the **Competitors** page before importing. Comp prices by zone data columns and descriptions are listed here.

If the prices are blank in the Excel file, and the records exist for the given UPC/Division/Zone/Competitor, then the competitive information will be deleted from the application upon import. A warning message will alert you that the records will be deleted.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Division	Required Division name
Zone	Required Zone name
Competitor (CompetitorKey)	Required, unique key Competitor name or ID
Multiple (SuggestedMultiple)	Multiple amount; for example, if product is 3 for $1, enter 3 in this column.
MultiplePrice	Multiple price; for example, if product is 3 for $1, enter 1 in this column.
StartDate	Effective start date of the competitive price you are importing

Comp prices by zone - line

You must enter the competitor names in the **Competitors** page before importing. Comp prices by zone - line data columns and descriptions are listed here.

If the prices are blank in the Excel file, and the records exist for the given UPC/Line/Division/Zone/Competitor, then the competitive information is deleted from the application upon import. A warning message alerts you that the records will be deleted.

Data Column (in order from first to last)	Description
Product Category (ProductCategory)	Required Product category to which the competitor data will apply
Line (LineGroup)	Use single quote (') before the value Name of the line group
Division	Required Division name
Zone	Required Zone name
Competitor (CompetitorKey)	Required, unique key Competitor name or ID
Multiple (SuggestedMultiple)	Multiple amount; for example, if product is 3 for $1, enter 3 in this column.
MultiplePrice	Multiple price; for example, if product is 3 for $1, enter 1 in this column.
StartDate	Effective start date of the competitive price you are importing

Cost configuration - line/zone

Cost configuration - line/zone data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
Product Category (ProductCategory)	Required Product category to which the cost type will apply
Division	Required Division name
Line (LineGroup)	Required, use single quote (') before the value Name of the line group
Zone	Required Zone name

Data Column (in order from first to last)	Description
Cost Source	Cost source used for the product at the SKU/chain level

Cost configuration - SKU/chain

Cost configuration - SKU/chain data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Cost Source	Cost source used for the product at the SKU/chain level

Cost configuration - SKU/division

Cost configuration - SKU/division data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Division	Required Division name
Cost Source	Cost source used for the product at the SKU/division level

Cost family

Cost family data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Cost Family (CostFamily)	Use single quote (') before the value Cost family name

Cost margin

This table is for CP customers only. Cost margin data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
Product Category (ProductCategory)	Required Product category name

Data Column (in order from first to last)	Description
Division	Required Division name
Manufacturer	Required Manufacturer name or asterisk (*) for the wildcard character
Brand	Required Brand name or asterisk (*) for the wildcard character
Cost Margin	Required Cost margin percentage value; for example, 5.0%
Use Cost Margin	Required Enter 0 if you do not want to use the entered cost margin until later; enter 1 to use the cost margin

Current prices

Cost prices data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Store Number (CustomerLocationKey)	Required, use single quote (') before the value Store number or identifier
Multiple	Multiple amount; for example, if product is 3 for $1, enter 3 in this column.
CurrentPrice	Individual product price or multiple price If entering multiples prices, enter the total price for the number of products entered in the Multiple column. For example, if product is 3 for $1, enter 1 in this column.

Current prices by zone

Current prices by zone data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code

Data Column (in order from first to last)	Description
Division	Required Division name
Zone	Required Zone name
Multiple	Multiple amount; for example, if product is 3 for $1, enter 3 in this column.
CurrentPrice	Individual product price or multiple price If entering multiples prices, enter the total price for the number of products entered in the Multiple column. For example, if product is 3 for $1, enter 1 in this column.

Custom relationships

This import creates product relationships that are specific to your company. Users can then utilize these relationships to create Custom Relationship rules to use in pricing actions. Custom relationships data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
Relationship Type	Required User-defined field to set the type of relationship
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Custom Family	User-defined custom family name
Custom Class	User-defined custom class name

Note: To delete a Custom Relationships record from the application, re-import the data with the Custom Family and Custom Class fields blank.

Express price overrides by store - SKU

Express® price overrides by store - SKU data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
(Express Pricing RunID)	Required, unique key Express pricing run ID; this ID is located in the Express Pricing page for each run and appears automatically if you export first. Do no alter this column.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Store Number (CustomerLocationKey)	Required, use single quote (') before the value Store number or identifier
Override Multiple	Multiple amount associated with the override price; for example, if product is 3 for $1, enter 3 in this column.
Override Price	Required Override price that will be used as the Express Price
Override Cost	Required
Price Effective Date	Effective start date of the override price you are importing

Express price overrides by zone - line

Express price overrides by zone - line data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
(Express Pricing RunID)	Required, unique key Express pricing run ID; this ID is located in the Express Pricing page for each run and appears automatically if you export first. Do no alter this column.
Product Category (ProductCategory)	Required Product category name
Line (LineGroup)	Required, use single quote (') before the value Line group name
Division	Division name
Zone	Required Zone name
Override Multiple	Multiple amount associated with the override price; for example, if product is 3 for $1, enter 3 in this column.
Override Price	Required Override price that will be used as the Express Price
Override Cost	Override cost
Price Effective Date	Effective start date of the override price you are importing

Express price overrides by zone - SKU

Express price overrides by zone - SKU data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
(Express Pricing RunID)	Required, unique key Express pricing run ID; this ID is located in the Express Pricing page for each run and appears automatically if you export first. Do no alter this column.
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Zone	Required Zone name
Override Multiple	Multiple amount associated with the override price; for example, if product is 3 for $1, enter 3 in this column.
Override Price	Required Override price that will be used as the Express Price
Price Effective Date	Effective start date of the override price you are importing

Last digits

Last digits data columns and descriptions are listed here.

Use this import to set specific last digits for prices.

Data Column (in order from first to last)	Description
Name	Required, use single quote (') before the value
Description	Description of the rule
Product Category (ProductCategory)	The specific product category to which the products belong. To specify "all categories," use null.
Multiple	Required Multiple amount; for example, if product is 3 for $1, enter 3 in this column.
Last Digits (LastDigitsString)	Use single quote (') before the value Last digits that prices are allowed to end in; for example, 95, 45

Line prices

Line prices data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Line (LineGroup)	Use single quote (') before the value Line group name

Line to line relationship

Line to line relationship data columns and descriptions are listed here.

This imports line group to line group relationship data used for the Product or Line Relationship rule.

Data Column (in order from first to last)	Description
Product Category (ProductCategory)	Required Product category to which the Product or Line Relationship rule will apply
Line(1)	Line group name
Line(2)	Line group name
Relationship Type	Enter Multiplier or Relative. • Multiplier: The value is multiplied with the optimized price of Line(1). • Relative: The value is added to the optimized price of Line(2). If the Relationship Type field is blank in the import file, the relationship will not appear in IBM Omni-Channel Merchandising. If the relationship already exists, IBM Omni-Channel Merchandising will delete it.
Relationship Value	Numeric value (greater than zero for multipliers) used to determine the new price of Line(2), as in the following calculations: • *Price of Line(2) = Price of Line(1) * Multiplier Value* • *Price of Line(2) = Price of Line(1) + Relative Value*

Line to line relationship by zone

This imports line group to line group relationship data by zone used for the Product or Line Relationship rule. Line to line by zone relationship data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
Product Category (ProductCategory)	Required Product category to which the Product or Line Relationship rule will apply
Zone	Required Zone name
Line(1)	Line group name
Line(2)	Line group name
Relationship Type	Enter Multiplier or Relative. • Multiplier: The value is multiplied with the optimized price of Line(1). • Relative: The value is added to the optimized price of Line(2). If the Relationship Type field is blank in the import file, the relationship will not appear in IBM Omni-Channel Merchandising. If the relationship already exists, IBM Omni-Channel Merchandising will delete it.
Relationship Value	Numeric value (greater than zero for multipliers) used to determine the new price of Line(2), as in the following calculations: • *Price of Line(2) = Price of Line(1) * Multiplier Value* • *Price of Line(2) = Price of Line(1) + Relative Value*

Location group class assignment

Contact an Integration Services representative for assistance updating location groups.

Location group class store mappings

Contact an Integration Services representative for assistance updating location groups.

Locked prices

This import locks the prices of all UPCs listed in the file. Locked prices data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Division	

Data Column (in order from first to last)	Description
Zone (Name)	Use single quote (') before the value Name of the store zone (found in Data Maintenance > Store Zone report)
Store Number (CustomerLocationKey)	Required, unique key, use single quote (') before the value Store number or identifier
Locked Override (Is UserLocked)	Locks the price; use 0 to unlock and 1 to lock. A lock icon appears next to locked prices in the IBM Omni-Channel Merchandising user interface.

Note: For divisional customers, a fifth data column is required, labeled **Division**.

Locked prices by division

This import locks the prices of all UPCs listed in the file. Locked prices by division data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Division	Required Division name
Locked Override (Is UserLocked)	Locks the price; use 0 to unlock and 1 to lock. A lock icon appears next to locked prices in the IBM Omni-Channel Merchandising user interface.

Locked prices by zone

This import locks the prices of all UPCs listed in the file. Locked prices by zone data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Division	Required Division name

Data Column (in order from first to last)	Description
Zone	Required Zone name
Locked Override (Is UserLocked)	Locks the price; use 0 to unlock and 1 to lock. A lock icon appears next to locked prices in the IBM Omni-Channel Merchandising user interface.

Markdown data

Markdown data data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Store Number (CustomerLocationKey)	Required, unique key, use single quote (') before the value Customer store number or identifier
Customer OutDate	Final date that the product is available to sell on the store shelf
Mkd StartDate	Date that the markdown starts for the product-location (MM/DD/YYYY format)
Customer MkdCode	10 character maximum Indicator of product status; for example, C is candidate for markdown and M is one or more markdowns have occurred.
Inventory	Units available to sell at a location as of the inventory date
Inventory Date	Date on which the inventory amount is applicable (MM/DD/YYYY format)

Multiple price points

Multiple price points columns and descriptions are listed here.

Data Column (in order from first to last)	Description
Product Category (ProductCategory)	Specific product category into which IBM Omni-Channel Merchandising will insert the multiple price point
Minimum Unit Price (MinUnitPrice)	Lowest new price that is assigned the multiple price point
Maximum Unit Price (MaxUnitPrice)	Highest new price that is assigned the multiple price point
Multiple	Multiple amount; for example, if product is 3 for $1, enter **3** in this column.

Data Column (in order from first to last)	Description
Price Point (PricePoint)	Price value; for example, if the product is 3 for $1, enter **$1** in this column.

Other class and family1

Other class and family1 data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Other1 Class (Other1Class)	Use single quote (') before the value Class name
Other1 Family (Other1Family)	Use single quote (') before the value Family name

Other class and family2

Other class and family2 data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Other2 Class (Other2Class)	Use single quote (') before the value Class name
Other2 Family (Other2Family)	Use single quote (') before the value Family name

Pre-priced flag

Pre-priced flag data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
PrePrice (IsPrePriced)	Required 0 means the product is not pre-priced; 1 means the product is pre-priced

Price overrides

This imports a file that overrides a scenario's optimized prices. Typically, you will export the **Price Overrides** report. Price overrides data columns and descriptions are listed here.

See “Exporting data” on page 181, make price changes, and import the file back into IBM Omni-Channel Merchandising.

Data Column (in order from first to last)	Description
(ScenarioRunID)	Required, unique key Scenario ID; this ID is contained in the URL on the Scenario Details page and appears automatically if you export first. Do not alter this column.
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Store Number (CustomerLocationKey)	Required, unique key, use single quote (') before the value Store number or identifier
Multiple (OverOptMultiple)	Multiple associated with the override price; do not alter this column.
Manual Override (OverOptMultiplePrice)	Required Override price that will replace the optimized price
Price Effective Date	Effective start date of the override price you are importing
Transfer Price Override Multiple	Multiple associated with the override transfer price - visible only to Franchise Pricing users.
Transfer Price Override	Override transfer price specified for the UPC - visible only to Franchise Pricing users.

Related Topics

“Exporting data” on page 181

Price overrides - line

This imports a file that overrides a scenario's optimized prices. Typically, you will export the **Price Overrides** report. Price - line overrides data columns and descriptions are listed here.

See “Exporting data” on page 181, make price changes, and import the file back into IBM Omni-Channel Merchandising.

Data Column (in order from first to last)	Description
(ScenarioRunID)	Required, unique key Scenario ID; this ID is contained in the URL on the Scenario Details page and appears automatically if you export first. Do not alter this column.
Line (LineGroup)	Use single quote (') before the value Line group name
Store Number (CustomerLocationKey)	Required, unique key, use single quote (') before the value Store number or identifier
Multiple (OverOptMultiple)	Multiple associated with the override price; do not alter this column.
Manual Override (OverOptMultiplePrice)	Required Override price that will replace the optimized price
Price Effective Date	Effective start date of the override price you are importing
Transfer Price Override Multiple	Multiple associated with the override transfer price - visible only to Franchise Pricing users.
Transfer Price Override	Override transfer price specified for the Line Group - visible only to Franchise Pricing users.

Related Topics

"Exporting data" on page 181

Price overrides by zone

This imports a file that overrides a scenario's optimized prices. Typically, you will export the **Price Overrides** report. Price overrides by zone data columns and descriptions are listed here.

See "Exporting data" on page 181, make price changes, and import the file back into IBM Omni-Channel Merchandising.

Data Column (in order from first to last)	Description
(ScenarioRunID)	Required, unique key Scenario ID; this ID is contained in the URL on the Scenario Details page and appears automatically if you export first. Do not alter this column.
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Zone	Required Zone name
Multiple (OverOptMultiple)	Multiple associated with the override price; do not alter this column.
Manual Override (OverOptMultiplePrice)	Required Override price that will replace the optimized price
Price Effective Date	Effective start date of the override price you are importing
Transfer Price Override Multiple	Multiple associated with the override transfer price - visible only to Franchise Pricing users.
Transfer Price Override	Override transfer price specified for the UPC/Zone - visible only to Franchise Pricing users.

Related Topics

"Exporting data" on page 181

Price overrides by zone - line

This imports a file that overrides a scenario's optimized prices. Typically, you will export the **Price Overrides** report. Price overrides by zone - line data columns and descriptions are listed here.

See "Exporting data" on page 181, make price changes, and import the file back into IBM Omni-Channel Merchandising.

Note: IBM Omni-Channel Merchandising is also able to configure automatic loading of override prices at the Line/Zone aggregation level via OpenLink. For details, consult your IBM Omni-Channel Merchandising representative.

Data Column (in order from first to last)	Description
(ScenarioRunID)	Required, unique key Scenario ID; this ID is contained in the URL on the Scenario Details page and appears automatically if you export first. Do not alter this column.
Line (LineGroup)	Use single quote (') before the value Line group name
Zone	Required Zone name
Multiple (OverOptMultiple)	Multiple associated with the override price; do not alter this column.
Manual Override (OverOptMultiplePrice)	Required Override price that will replace the optimized price
Price Effective Date	Effective start date of the override price you are importing
Transfer Price Override Multiple	Multiple associated with the override transfer price - visible only to Franchise Pricing users.
Transfer Price Override	Override transfer price specified for the Line/Zone - visible only to Franchise Pricing users.

Related Topics

"Exporting data" on page 181

Product group

Product group data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Name	Required, 50 character maximum Product group name

Product link

Product link data columns and descriptions are listed here.

IBM Omni-Channel Merchandising does not create product links upon import if the following errors occur. The errors will appear in the **Import Status** dialog box. See "Checking import status" on page 180.

- The new product UPC and mature product UPC are invalid
- The mature product does not have any modeling coefficients

Data Column (in order from first to last)	Description
New Product UPC	Required, unique key, use single quote (') before the value 20 digit UPC code of new product
Mature Product UPC	Required, unique key, use single quote (') before the value 20 digit UPC code of mature product
Link Type	• LINEEXT: Line extension; the new product will be introduced as an extension of an existing line group that includes the mature product. • DIRECTREP: Direct replacement; the new product will be replacing the mature product in the assortment. • null; the new product will not be extending an existing line group or replacing the mature product.
Estimated Weekly Volume	Estimated weekly volume for the new product when the mature product is discontinued
Incremental Volume Percentage	Estimated incremental volume percentage for the new product when the mature product is discontinued

Related Topics

"Checking import status" on page 180

Product status

Product status data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Store Number (CustomerLocationKey)	Required, use single quote (') before the value Store number or identifier
Prod Status (pIncPrd)	Status of the product; **1** means the product is active; **0** means the product is discontinued.

Product status by zone

Product status by zone data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Division	Required Division name
Zone	Required Zone name
Prod Status (pIncPrd)	Status of the product; **1** means the product is active; **0** means the product is discontinued.

Product to product relationship

This imports product to product relationship data used for the Product or Line Relationship rule. Product to product relationship data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC(1)	Required, unique key, use single quote (') before the value 20 digit UPC code
UPC(2)	Required, unique key, use single quote (') before the value 20 digit UPC code
Relationship Type	Enter Multiplier or Relative. • Multiplier: The value is multiplied with the optimized price of UPC(1). • Relative: The value is added to the optimized price of UPC(1). If the Relationship Type field is blank in the import file, the relationship will not appear in IBM Omni-Channel Merchandising. If the relationship already exists, IBM Omni-Channel Merchandising will delete it.
Relationship Value	Numeric value (greater than zero for multipliers) used to determine the new price of UPC(2), as in the following calculations: • *Price of UPC(2) = Price of UPC(1) * Multiplier Value* • *Price of UPC(2) = Price of UPC(1) + Relative Value*

Product to product relationship by zone

This imports product to product relationship data used for the Product or Line Relationship rule. Product to product relationship by zone data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
Division	Required Division name
Zone	Required Zone name
UPC(1)	Required, unique key, use single quote (') before the value 20 digit UPC code
UPC(2)	Required, unique key, use single quote (') before the value 20 digit UPC code
Relationship Type	Enter Multiplier or Relative. • Multiplier: The value is multiplied with the optimized price of UPC(1). • Relative: The value is added to the optimized price of UPC(1). If the Relationship Type field is blank in the import file, the relationship will not appear in IBM Omni-Channel Merchandising. If the relationship already exists, IBM Omni-Channel Merchandising will delete it.
Relationship Value	Numeric value (greater than zero for multipliers) used to determine the new price of UPC(2), as in the following calculations: • *Price of UPC(2) = Price of UPC(1) * Multiplier Value* • *Price of UPC(2) = Price of UPC(1) + Relative Value*

Promoted product group - LU

Promoted product group - LU data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
Product Group Name	Required, 50 character maximum Promoted product group name; if the specified name does not exist, IBM Omni-Channel Merchandising creates a new promoted product group.

Data Column (in order from first to last)	Description
Product Group Code	20 character maximum Unique code for the promoted product group
Logistical Item Identifier	30 character maximum Logistical unit code; if a logistical unit you select (or a UPC linked to that logistical unit) already belongs to another promoted product group, IBM Omni-Channel Merchandising ignores the row.

Promoted product group - SU

Promoted product group - SU data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
Name	Required, 50 character maximum Promoted product group name; if the specified name does not exist, IBM Omni-Channel Merchandising creates a new promoted product group.
Code	20 character maximum Unique code for the promoted product group
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code; if a UPC you select already belongs to another promoted product group, IBM Omni-Channel Merchandising ignores the row.

Size class and family

Size class and family data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Size Class (SizeClass)	Use single quote (') before the value Size class name; allowable size class formats are size classes defined for the category. If the classes have not yet been defined, use the defaults (XXX-LARGE, XX-LARGE, X-LARGE, LARGE, MEDIUM, SMALL, X-SMALL, XX- SMALL XXX-SMALL) which you can later update in IBM Omni-Channel Merchandising.
Size Family (SizeFamily)	Use single quote (') before the value Size family name

SKU attributes

SKU attribute data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Attribute0	SKU attribute name; if left blank, you can assign an attribute to a product in the Data Maintenance > SKU/Zone Attribute report after the import. The report contains 10 attribute fields (Attribute<0-9>). Your company may choose not to use these fields or to only use some of them.

SKU/Zone attribute

SKU/Zone attribute data columns and descriptions are listed here.

A maximum of six attributes can be defined.

Note: You must first contact IBM Omni-Channel Merchandising Support before importing your own attributes to replace the system default CPI attributes (Ultra Notable, Notable, Partially Notable, Not Notable, Undefined1, Undefined2).

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Division	Required Division name
Zone Group	Required Zone group name
Zone	Required Zone name
CPI Attribute	Enter one of the following or leave blank: • Ultra Notable • Notable • Partially Notable • Not Notable • Undefined1 • Undefined2

Data Column (in order from first to last)	Description
Attribute0	SKU/zone attribute name; if left blank, you can assign an attribute to a product in the Data Maintenance > SKU/Zone Attribute report after the import. The report contains 5 attribute fields (Attribute<0-4>). Your company may choose not to use these fields or to only use some of them.

Store attributes

Store attributes data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
Store Number (CustomerLocationKey)	Required, use single quote (') before the value Store number or identifier
Level1 Descr	This report contains **Level<1-12> Descr** columns. Each column holds the description for a different store attribute. These attributes are only used for reporting purposes. Your company may choose not to use them or to use only some of the fields.
Level1 Code	This report contains Level<*1-12*> Code columns. Each column holds the code for a different store attribute. This code relates to the description field. These attributes are only used for reporting purposes. Your company may choose not to use them or to use only some of the fields.
Attribute1	Company defined store attribute; this value is optional and used only for reporting purposes. The import contains four attribute fields (Attribute<1-4>).

Store group

Store group data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
Store Number (CustomerLocationKey)	Required, use single quote (') before the value Store number or identifier
Name	Required, unique key, use single quote (') before the value Store group name
Division	Division name

Store price zone

Store price zone data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
Division	Division name
Store Number (CustomerLocationKey)	Required, unique key, use single quote (') before the value Store number or identifier
Name	Required, use single quote (') before the value Store group name

Tier class and family

Tier class family data columns and descriptions are listed here.

You must have the **Manage Tiered Pricing** permission to import tier classes and families. See "Price permissions" on page 199.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Tier Class (TierClass)	Use single quote (') before the value Tier class name
Tier Family (TierFamily)	Use single quote (') before the value Tier family name

Time series product status

Time series product status data columns and descriptions are listed here.

Time Series Product Status enables you to specify effective dates for each Product loaded into IBM Omni-Channel Merchandising. For more information about applying effective dates, please contact your IBM Omni-Channel Merchandising representative.

Data Column (in order from first to last)	Description
UPC (ProductUPC)	Required, unique key, use single quote (') before the value 20 digit UPC code
Location Key (LocationKey)	The unique location, location group, or location group class key
Status Code (StatusCode)	Status code for the product status, as defined in the **Data** > **Product Status Mapping** report
Effective Date (EffectiveDate)	Date at which the specified status code will become effective for the UPC, in mm/dd/yyyy format

Transfer prices by store

You must have the **Franchise Pricing** permission to import transfer prices. Transfer prices by store data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Store Number	Use single quote (') before the value Store number or identifier
Transfer Multiple	Required Multiple amount; for example, if product is 3 for $1, you would enter **3** in this column.
Transfer Price	Required Price at which the item is sold to a franchisee; if you use multiples pricing, enter the price for the number of units in the Transfer Multiple field.

Transfer prices by zone

You must have the **Franchise Pricing** permission to import transfer prices. Transfer prices by zone data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Division	Required Division name
Zone	Required Zone name
Transfer Multiple	Required Multiple amount; for example, if product is 3 for $1, you would enter **3** in this column.
Transfer Price	Required Price at which the item is sold to a franchisee; if you use multiples pricing, enter the price for the number of units in the Transfer Multiple field.

Zone exception

Zone exception data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Division	Division name
Zone (Name)	Store zone
Store Number (CustomerLocationKey)	Use single quote (') before the value Store number or identifier
Zone Override (IsZoneException)	Enter 0 if the product does not have a zone override; enter 1 if the product has a zone override.

Zone group assignment

Zone group assignment data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
Product Category (ProductCategory)	Product category to which the zone group will apply
Division	Division name
Zone Group	Zone group name

Zone override

This imports a file that overrides a scenario's optimized prices. Typically, you will export the **Price Approval** report. Zone override data columns and descriptions are listed here.

See "Exporting data" on page 181, make the price changes, and import the file back into IBM Omni-Channel Merchandising.

Data Column (in order from first to last)	Description
(ScenarioRunID)	Required, unique key Scenario ID; this ID is contained in the URL on the Scenario Details page and appears automatically if you export first. Do not alter this column.
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Zone	Required Zone name
Multiple (OverOptMultiple)	Multiple associated with the override price; do not alter this column.

Data Column (in order from first to last)	Description
Manual Override (OverOptMultiplePrice)	Required Override price that will replace the optimized price
Price Effective Date	Effective start date of the override price you are importing

Related Topics

"Exporting data" on page 181

Zone-location mapping

This import maps locations to zones. If the zone does not exist, a new zone will be created after import. Also, if the zone is set to empty/null in the import file, the current mapping will be deleted, meaning that the store will be unassigned from any zones. Zone-location mapping data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
Division	Required Division name
Zone Group	Required Zone group name
Zone (Name)	Store zone
Store Number (CustomerLocationKey)	Required, use single quote (') before the value Store number or identifier

Importing data files

Use this procedure to import data files. You must have the **Import data to applications** user permission to import data from a local file into the applications.

About this task

Data can be imported into IBM Omni-Channel Merchandising services using the **Import** dialog box.

Procedure

1. Choose **Data** > **Import** to open the **Import** dialog box.
2. Select the type of data that you are importing from the **Data Type** drop-down menu.
3. Enter a description of the file in the **Description** text box. This will help you identify the type of data you are importing. Use descriptions that tell you what

category you are importing, or the types of edits you made, for example. The description will be the best way for you to find your file in the **Import Status** dialog box.

4. Enter the file name in the **Upload File** section. Make sure your file name contains 8 characters or less. The import will fail if it contains more characters.
5. Click **Import**.
6. When the import data process completes, the **Import Status** dialog box opens with your import listed.

Related Topics

"Checking import status"

Checking import status

You will only be able to view your data imports. The **View all imports** user permission enables administrators to view imports of all users. Use this procedure to check import file status.

About this task

When a data file is imported into a IBM Omni-Channel Merchandising service, the import process checks for the valid number of columns, the correct type of data (text or numeric in the appropriate records), the required fields, and if the records are allowed to be inserted or updated.

You can check the status in the **Import Status** dialog box. The data file will either be in the queue to be imported, in the process of being imported, completed, or have errors. If the file has errors, you must fix the errors in your original file, and then re-import.

Procedure

1. Choose **Data** > **Import Status**. The **Import Status** dialog box opens.

   Each import is listed with a numeric ID, file name (typically your username), status, and the description that you typed in when you imported the file.

   The status is one of the following:

   - **Pending** - The file is in the queue, waiting for import to begin.
   - **Importing** - The file is being imported.
   - **Finished** - The file is successfully imported and can be viewed in the appropriate pages (product group data appears in the **Product Group** page, for example).
   - **Error** - The file was not imported successfully. Check the import log to view the errors. To view the import log, click on the file name (the underlined link). The **Import Log** dialog box opens. All of the errors are listed on this dialog box per line. If there are errors, you can go to the correct line in your original file, fix the error, and then start a new import.
2. Once imports are done, you can delete them from the **Import Status** dialog box to reduce clutter. To delete an import, right-click on the import, and select **Delete**. A dialog box appears asking if you are sure that you want to delete; click **Yes**. The page refreshes and your import is deleted.

Exporting data

You must have the **Export data to applications** user permission to export data from the applications. Use this procedure to export data.

About this task

Data can be exported from IBM Omni-Channel Merchandising services to edit in Excel, or to review. You can export data files, such as product groups, and reports, such as Data Maintenance reports.

Procedure

1. Choose **Data** > **Export**. The **Export** dialog box opens.
2. Select the type of data that you want to export from the **Report** drop-down menu.
3. Enter a description of the file in the **Description** text box using up to 8 characters. This will help you identify the type of data that you are exporting, and will be the best way for you to find your file in the **Export Status** page.
4. Select the file type that you want exported: Excel 97-2003 (*.xls*), Excel 2007 (*.xlsx*), or CSV. CSV format is recommended for exporting large amounts of data (above 130,000 records), since performance may vary with different memory configurations on your computer. You can click the **Get Record Count** button to view the total number of records that are in the report before exporting. The following describes the formatting of report fields when exported to a CSV file:
   - Double quotes are not appended to fields, unless they need to be used for the delimiter (a comma appearing in one of the numeric fields, for example, as a decimal separator).
   - All numeric/decimal number types will show a minimum of two decimal places and a maximum of three. For IBM Markdown Optimization, five digits are allowed before the decimal point.
   - Currency fields are displayed based on the locale Decimal and thousands separators are based on the locale.
   - All dates are displayed in short format (mm/dd/yy or dd/mm/yy) and are formatted per locale If the date needs to be displayed with the time, it will be displayed in short format Large CSV files should be opened using Notepad or another text editor, instead of Excel. If you must use Excel to view the CSV file, import the file into the Excel application.
5. Select the division that you want to export from the **Division** drop-down menu. The **Division** drop-down menu will only display if the report requires a division for exporting. You can select multiple divisions using Shift-click or Ctrl-click for certain reports.
6. Select the product category that you want to export from the **Export Category** drop-down menu. The **Export Category** drop-down menu will only display if the report requires a product category for exporting. You can select multiple categories using Shift-click or Ctrl-click, or select **All Categories** for certain reports.
7. Select the store group that you want to export from the **Export Store Group** drop-down menu. The **Export Store Group** drop-down menu will only display if the report requires a store group for exporting.
8. Click **Export**. The **Export Status** dialog box opens, and your export is listed.

Checking export status

Use this procedure to check data export status, after a data export has started. You will only be able to view your data exports. The **View all exports** user permission enables administrators to view exports of all users.

About this task

Procedure

Choose **Data** > **Export Status**. The **Export Status** dialog box opens.
Each export is listed with a numeric ID, file name (typically your username), status, and the description that you typed in when you imported the file.
The status is one of the following:

- **Exporting** - The file is being exported.
- **Finished** - The file is successfully exported. You can view the file by clicking on the file name (underlined link). The file will open in an Excel browser window. You can print, edit, or save the file from this window.
- **Error** - The file was not exported successfully.

Once exports are done, you can delete them from the **Export Status** dialog box to reduce clutter.

Deleting an export

Use this procedure to delete an export.

Procedure

1. Right-click on the export.
2. Select **Delete**. A dialog box opens asking if you are sure you want to delete.
3. Click **Yes**. The page refreshes and your export is deleted.

Chapter 8. User administration

If you have administrator privileges, you can set up new users and assign user permissions and roles.

User permissions define:
- Type of user
- Applications that can be accessed
- Product categories that are viewed within the applications
- Associated roles

You can request a report of your organization's recent user permission and role assignments and changes from IBM Omni-Channel Merchandising Customer Support, if you need to track this type of information.

If you try to access the **Users** page without the appropriate permissions, an **Access Denied** warning message will appear.

Related Topics

"Editing users" on page 185
"Creating new users"
"Editing user permissions" on page 186
"Managing user roles" on page 189
"Subscribing to alerts" on page 207

Creating new users

Use this procedure to create new users.

About this task

You can add new users at any time. You assign users to the IBM Omni-Channel Merchandising applications, roles with permissions for performing specific tasks within the applications, companies (organizations), and access to instances.

Users can also be subscribed to receive alert notifications when jobs have started or completed. See "Editing users" on page 185.

Procedure

1. Click the **Home** tab to open the IBM Omni-Channel Merchandising home page.
2. Click **User Management** in the secondary navigation bar to open the **User Management** page. The page displays all users with their profile information. You can also filter the users by company name, user name, email address, or set a checkbox to also include users that have not been assigned to roles or applications.
3. Click **Create User** to create a new user in the **Create New User** dialog box.

4. Enter the user's log in name, default password, and then re-enter the password. The user will have the opportunity to change their default password.

   The password must meet the following requirements:

   - At least eight characters
   - At least one character/letter and one number (0 - 9)
   - At least one symbol (!@#$%^*_+-={}[]:;?|) (recommended, but not required)
5. Click **Next**. You can also restrict a user from accessing IBM Omni-Channel Merchandising by changing the user profile from active status (the default setting) to inactive status.
6. Fill in the user's profile information such as their first and last name, email address, city, state, and time zone. The first and last name, email address, phone number, country, city and zip code are required.
7. Click **Next**. If the **Next** button does not display, click in a field other than the last entered field to refresh the screen). Assign the user to a company (organization) by selecting a company name in the **Available Companies** panel, and clicking the forward arrows to move it to the **Assigned Company Access** panel. A user can be assigned to more than one company. You can also click **Select All** to move all of them at once.
8. Click **Next**.
9. Assign an instance to the user by selecting an instance name in the **Available Instances** panel, and clicking the forward arrows to move it to the **Assigned Instance Access** panel. A user can be assigned to more than one instance. You can also click **Select All** to move all of them at once.
10. Click **Next**.
11. Select the IBM Omni-Channel Merchandising applications available for the instance. The applications include the following:
    - Assortment
    - CP Promotion
    - Promotion
    - IBM Omni-Channel Merchandising home page
    - Reporting (highly graphical reports to supplement the application reports)
    - OpenLink
    - Markdown
    - MRA (Product Analyzer)
    - Price
    - Deal Management
    - Allowance Billing
12. Click **Create**. The user will be added to the **User Management** page. The user information can later be edited by clicking the **Details** link in the **User Management** page, and clicking the pencil icon next to each sub-section such as User Details, Company Access, and Applications in the **Details** page.

    Note: To change a user's username or email address, the user's status needs to be set as inactive, and then a new user profile needs to be created with the updated information. Users, however, can change their own passwords from the **My Account** page.

13. To enable the user to use the features in the IBM Omni-Channel Merchandising applications, you must assign the user permissions and roles in the **User Permissions** page. See "Editing user permissions" on page 186 for more information.

Related Topics

"Editing users"

"Editing user permissions" on page 186

"Managing user roles" on page 189

"Subscribing to alerts" on page 207

Editing users

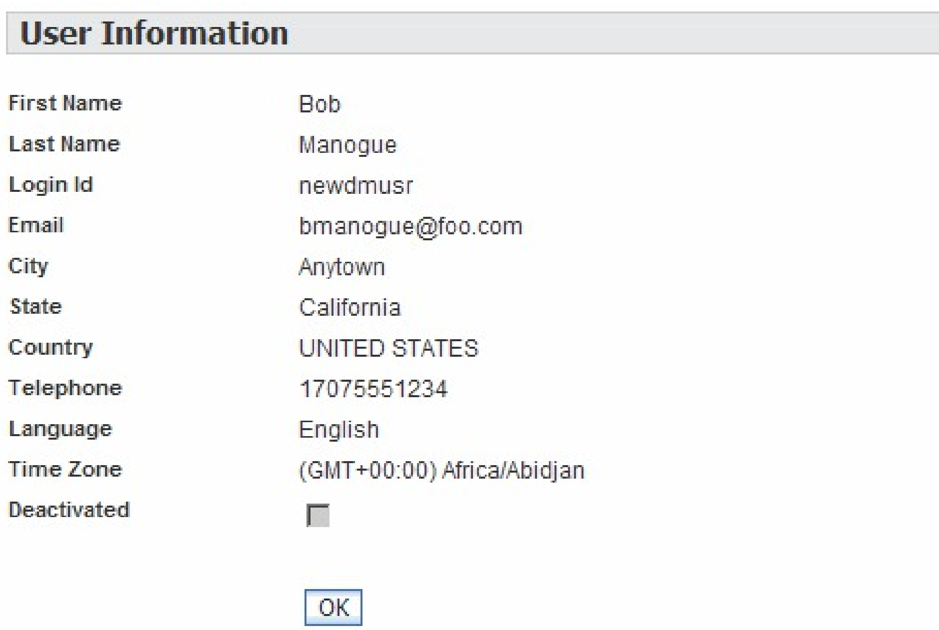
Use this procedure to edit users.

About this task

All users are listed in the **Users** page. From this page, you can view the user profile information and assign permission details. You can also subscribe users to receive alerts when events or activities in the applications have been initiated or completed.

Procedure

1. Choose **Admin** > **Access** > **Users** to open the **Users** page.
2. To view a user's profile information, right-click on a user's name, and select **View Profile**.



3. To assign user permissions for using the IBM Omni-Channel Merchandising services, select the user in the **Users** page, and select **Edit User Permission** in the right-click context menu. See "Editing user permissions" on page 186 for more information about permissions.

4. You can view all the user's permissions, including roles and categories by selecting **View Permission Details** in the right-click context menu.
5. To subscribe a user to receive alerts, select **Edit Alert Subscriptions** in the right-click context menu. See “Subscribing to alerts” on page 207 for more information about alerts.

Related Topics

“Editing user permissions”

“Subscribing to alerts” on page 207

Editing user permissions

Use this procedure to edit user permissions.

About this task

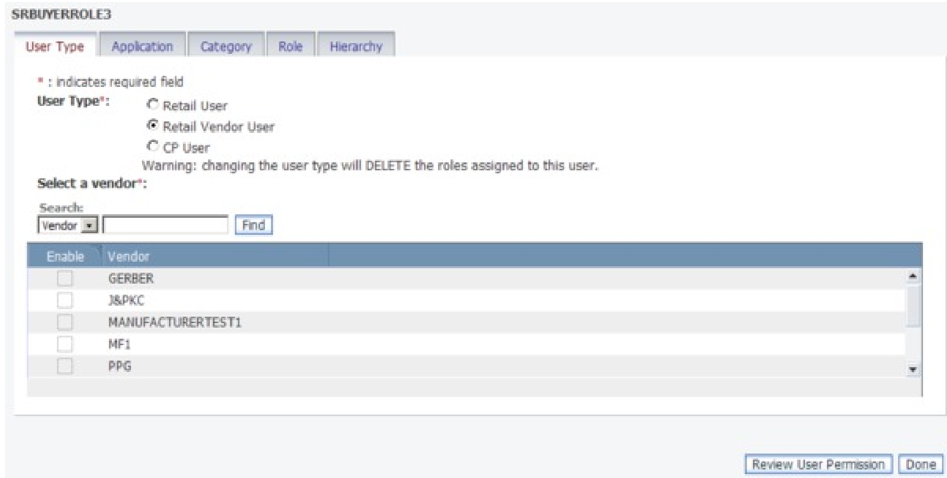
User permissions are assigned to a retail user, retail vendor user, and CPG user. User permissions define the IBM Omni-Channel Merchandising applications a user can access, the product categories the user sees within the applications, and roles with permissions for performing specific tasks within the applications.

Every user in a IBM Omni-Channel Merchandising application must be assigned to one or more roles with specific permissions, and set up with other information such as categories, based on their responsibilities in the organization. For example, a category manager might only have access to eight permissions, and only two or three categories in the organization.

Procedure

1. Choose **Admin** > **Access** > **Users** to open the **Users** page.
2. Select the user in the **Users** page, and select **Edit User Permission** in the right-click context menu. The **User Permissions** page opens.
3. Select one of the following user types in the **User Type** panel:
   - Retail user
   - Retail Vendor user
   - CP user

   Note: Changing the user type will delete any roles that have been assigned to the user.
4. If you selected **Retail Vendor user**, select the **Enable** checkbox next to the vendor name.



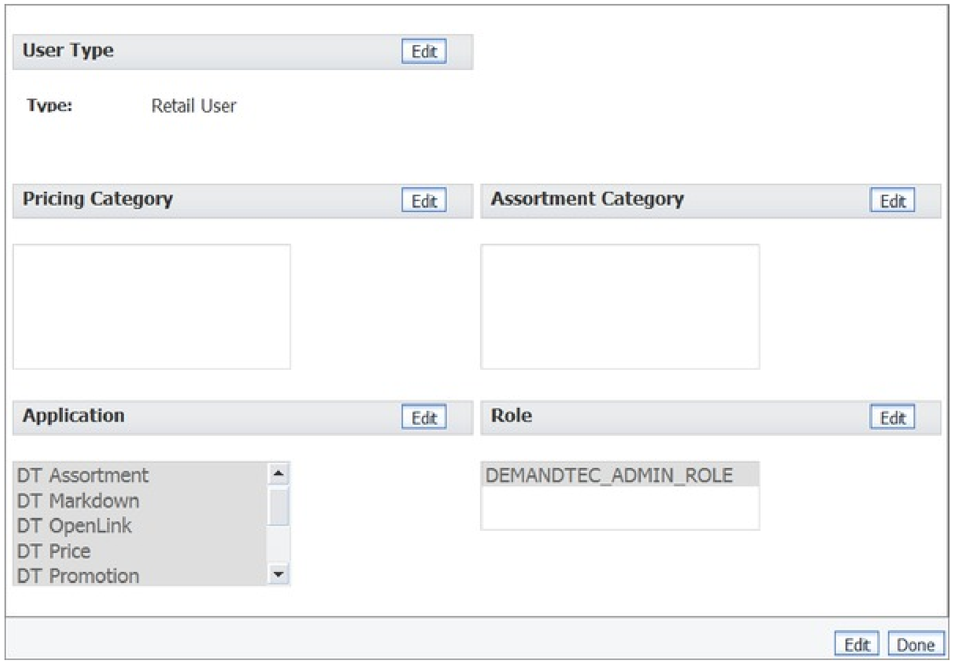
5. If you selected **CP user**, select the associated retailer account.
6. Select the **Application** tab, and set each IBM Omni-Channel Merchandising application that the user can access.
7. Select the **Category** tab, and select one of the following **Category Access** options. The user will be able to perform the assigned functions for only the selected categories.
   - **All Categories (including categories added in the future)** - Allows the user access to all categories in your company, including any newly added categories.
   - **Selected Categories -** Allows the user access to only the categories that you select. Click **Check All** to select all categories in the list at once.
8. If the user is using a merchandising product hierarchy, select the **Hierarchy** tab to assign access to the products in the hierarchy. Set the checkbox next to the products for which the user can access in the IBM Omni-Channel Merchandising applications. If a checkbox is set, the user will have access to that level and below by default.

These are some additional tips for enabling access to the products:

- Enabling access to parent node X gives the user access to all of X's child nodes
- Enabling access to all child nodes of Y does not automatically give access to parent node Y

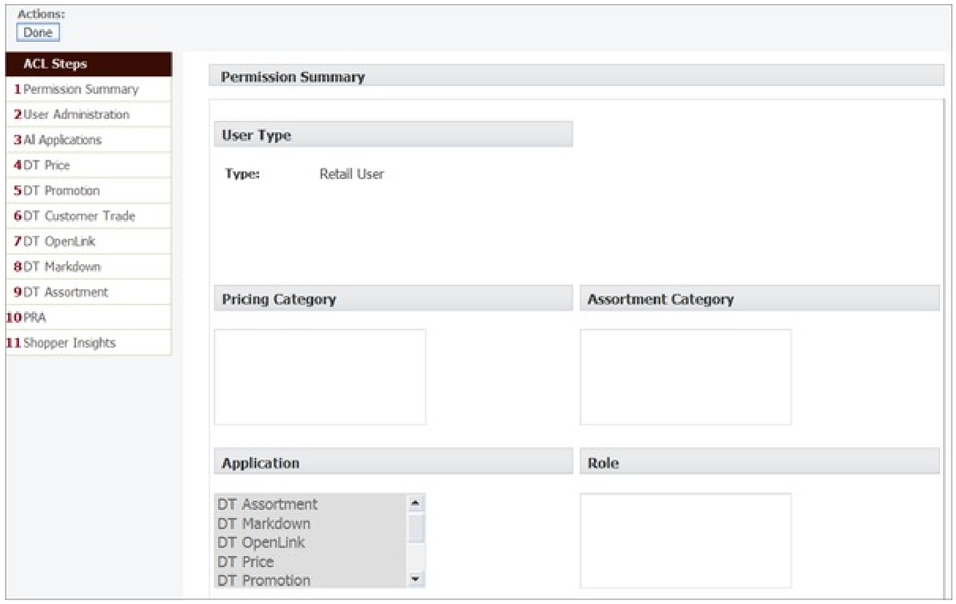
Note: The system setting platform.admin.display.hierarchy under IBM Omni-Channel Merchandising Properties must be set to true for the **Hierarchy** tab to display.

9. Next, select the **Role** tab to set the roles for the user in the **Role** section. See "Managing user roles" on page 189 for detailed information about roles.
10. Click **Review User Permission** to review all of your selections, or click **Done** to save your settings. The user will have the assigned permissions and categories after logging on to the IBM Omni-Channel Merchandising application.



A warning message will list any missing settings in each panel. You can click **Back** to close the message and continue to edit the sections with missing information, or click **Save** to save the current settings and return to the **Users** page. The **Users** page will display the roles, categories, and applications assigned to each user.

11. You can also review the assigned permissions and roles for a user in read-only mode by right-clicking, and selecting **View Permission Details** in the **Users** page. The **User Permission and Role Details** page appears.



Related Topics

"Managing user roles"

Managing user roles

The IBM Omni-Channel Merchandising applications include default roles with set permissions that you can assign to a user.

See "Default IBM Omni-Channel Merchandising roles" on page 190 for a table of all of the default roles and their permissions by application. The permissions are defined in "Managing user roles."

You can create new roles specifically for your organization, and assign certain permissions to each role. This allows you to quickly assign or change permissions for users. See "Creating roles" on page 206 and "Editing roles" on page 206. If you modify permissions for roles, the permissions for all associated users are automatically changed.

Before assigning roles to users, you can view those users already assigned to specific roles from the **Roles** page.

Related Topics

"Default IBM Omni-Channel Merchandising roles" on page 190

"Managing user roles"

"Creating roles" on page 206

"Editing roles" on page 206

"Viewing users assigned to a role" on page 207

"Editing user permissions" on page 186

Default IBM Omni-Channel Merchandising roles

The following table includes the default IBM Omni-Channel Merchandising roles and their permissions. These default roles and permissions can be modified, if you have administrative privileges.

Role	Application Permissions
Merchant	Price • Approve optimization • Edit critical data • Edit store zone structure • Edit default rules • Edit data • Edit other scenario • Edit other optimization • Edit scenario • Export to store • Export to client • Import data • Optimize • Select scenario
	Promotion • Edit Promotion • Optimize Promotion • Edit critical promotion data • Export promotion data • View Promotion Administration Detail • Manage basic events • Commit category plan • Create category plan • Predict category plan • Edit Promotion Administration Detail
Category Administrator	Price • Approve optimization • Edit data • Edit other scenario • Select scenario • Export to store • Export to client • Import data • Optimize
	Promotion • Edit Promotion Administration Detail
	Administration • Administer task scheduler
Sr. Category Administrator	Price • Approve optimization • Edit critical data • Edit data • Edit other scenario • Edit other optimization • Edit scenario • Export to store • Export to client • Import data • Optimize • Select scenario
	Promotion • Edit Promotion Administration Detail
	Administration • Administer task scheduler

Role	Application Permissions	
Technical Administrator	Administration • Administer organization • Edit users • Edit permissions • Administer task scheduler	• Administer job scheduler • View jobs • OpenLink admin
Pricing Analyst	Price • Approve optimization • Export to store • Export to client	
Promotion Manager	Promotion • Edit Promotion • Optimize Promotion • Edit critical promotion data • Export promotion data • Manage basic events	• Commit category plan • Create category plan • Predict category plan • Manage basic event implementation • Manage ad zones • View Promotion Administration Detail
Promotion Category Administrator	Promotion • Edit Promotion • Optimize Promotion • Edit critical promotion data • Manage basic events	• Commit category plan • Create category plan • Predict category plan • View Promotion Administration Detail
Promotion Vendor	Promotion • Promotion vendor	
DT PRA Analytics	Price Response Analysis • Access Price Response Analysis	Promotion Response Analysis • Access Promotion Response Analysis

Role	Application Permissions	
Training	Administration • Edit users • Edit permissions • Administer job scheduler	
	Price • Approve optimization • Edit critical data • Edit store zone structure • Edit default rules • Edit data • Edit other scenario	• Edit other optimization • Edit scenario • Export to store • Export to client • Import data • Optimize
	Promotion • Edit Promotion • Optimize Promotion • Edit critical promotion data • Export promotion data • Promotion vendor	• View Promotion Administration Detail • Edit Promotion Administration Detail
CPG Account Executive- Lite	Price • Export to client	
	Promotion • Edit Promotion • Optimize Promotion • Edit critical promotion data • Export promotion data	• View manufacturer metrics • Create category plan • Predict category plan • View Promotion Administration Detail
CPG Account Executive- Power®	Price • Export to client	
	Promotion • Edit Promotion • Optimize Promotion • Edit critical promotion data • Export promotion data • Manage basic event implementation • View Promotion Administration Detail	• Commit category plan • View manufacturer metrics • Manage basic events • Create category plan • Predict category plan

Role	Application Permissions
CPG Executive	Price (read-only) • Export to client
	Promotion (read-only) • View manufacturer metrics
DemandTec_Admin_ Role	Administration • Administer organization • Edit users • Edit permissions • Administer task scheduler • Administer job scheduler • View jobs • OpenLink admin • View Promotion Administration Detail • Edit Promotion Administration Detail
	Price • ABC reporting and admin • Approve optimization • DT Price internal admin • Edit critical data • Edit store zone structure • Edit default rules • Edit data • Edit other scenario • Select scenario • Manage store groups • Edit other optimization • Edit scenario • Export to store • Export to client • Import data • Optimize • Manage competitor data • Manage price update configuration • Manage size class definition
	Promotion • Edit promotion • Optimize promotion • Edit critical promotion data • Export promotion data • Manage basic event implementation • Manage basic events • Commit category plan • Create category plan • Predict category plan • Manage ad zone
	OpenLink • Enable access modeling master data • Enable access to Master Catalog • Enable modeling • Recalc Equiv. Unit for all products • Enable Batch Manager • Enable Category Manager • Test Product Status Resolver • Price delivery preference setup • Price delivery export edit • Manual price delivery • Enable access to Product Master Manager

Role	Application Permissions
IBM Omni-Channel Merchandising Analyst	Price • Approve optimization • Edit critical data • Edit store zone structure • Edit default rules • Edit data • Edit other scenario • Select scenario • Edit other optimization • Edit scenario • Export to store • Export to client • Import data • Optimize
	Promotion • Edit Promotion Administration Detail
	OpenLink • Enable attributing • Recalc Equiv. Unit for All Products • Enable Batch Manager • Enable Category Manager • Enable access to modeling master data • Test Product Status Resolver • Enable product linking

Role	Application Permissions
IBM Omni-Channel Merchandising Manager	Administration • Administer organization • Edit users • Edit permissions • Administer task scheduler • Administer job scheduler • View jobs • OpenLink admin
	Price • Approve optimization • Edit critical data • Edit store zone structure • Edit default rules • Edit data • Edit other scenario • Select scenario • Edit other optimization • Edit scenario • Export to store • Export to client • Import data • Optimize
	Promotion • Edit Promotion • Optimize Promotion • Edit critical promotion data • Export promotion data • Promotion vendor • Manage basic event implementation • View Promotion Administration Detail • Edit Promotion Administration Detail • View manufacturer metrics • Manage basic events • Commit category plan • Create category plan • Predict category plan • Manage ad zones
	OpenLink • Enable attributing • Recalc Equiv. Unit for all products • Enable Batch Manager • Enable Category Manager • Enable access to modeling master data • Test Product Status Resolver • Enable product linking

Role	Application Permissions
IBM Omni-Channel Merchandising Statistician	Administration • Administer job scheduler • View jobs • OpenLink admin • Administer task scheduler
	Price • Edit critical data • Edit store zone structure • Edit data • Edit other scenario • Select scenario • Edit other optimization • Edit scenario • Optimize
	Promotion • Edit Promotion Administration Detail
	OpenLink • Enable modeling • Recalc Equiv. Unit for all products • Enable Batch Manager • Enable Category Manager • Enable access to modeling master data • Test Product Status Resolver

Role	Application Permissions
IBM Omni-Channel Merchandising Technical Support	Administration • Administer organization • Edit users • Edit permissions • Administer task scheduler • Administer job scheduler • View jobs • OpenLink admin
	Price • Approve optimization • Edit critical data • Edit store zone structure • Edit default rules • Edit data • Edit other scenario • Select scenario • Edit other optimization • Edit scenario • Export to store • Export to client • Import data • Optimize
	Promotion • Edit Promotion • Optimize Promotion • Edit critical promotion data • Export promotion data • Promotion vendor • Manage basic event implementation • View Promotion Administration Detail • Edit Promotion Administration Detail • View manufacturer metrics • Manage basic events • Commit category plan • Create category plan • Predict category plan • Manage ad zones
	OpenLink • Enable modeling • Enable attributing • Recalc Equiv. Unit for all products • Enable Batch Manager • Enable Category Manager • Enable access to modeling master data • Test Product Status Resolver • Price delivery preference setup • Price delivery export edit • Manual price delivery • Enable product linking • Enable access to Product Master Manager

Role	Application Permissions
IBM Omni-Channel Merchandising Technical Integration	Administration • Administer job scheduler • View jobs • OpenLink admin • Administer task scheduler
	Price • Edit store zone structure • Export to store • Export to client
	OpenLink • Enable Batch Manager • Enable Category Manager • Price delivery preference setup • Price delivery export edit • Manual price delivery

User administration permissions

User administration permissions are listed here.

- **Administer Calendar Period Definitions** - Allows users to modify default calendar periods in the **Calendar Administration** section of the **Admin** page, and to upload new calendar period definition files.
- **Administer Company Wide UI Preferences**- Allows the user to set default report settings in the **Edit Report** pages for all users within a company.
- **Administer Display Setup** - Allows the user to load display templates, configure the **Display Planning** tool, and manage display characteristics.
- **Administer Job Scheduler** - Allows the user to edit jobs in the Job Scheduler queue. These are the behind-the-scenes processes that run.
- **Administer Notification Aliases**- Allows the user to create, delete, or edit notification aliases for groups of users to receive alerts.
- **Administer Organization** - Allows IBM Omni-Channel Merchandising Support and IBM Omni-Channel Merchandising Operations to set up a new company and edit company information.

  Note: Administer Organization should be selected for IBM Omni-Channel Merchandising Support and IBM Omni-Channel Merchandising Operations users only. The application may be unstable if the database properties are set improperly.
- **Administer Task Scheduler** - Allows the user to create and manage tasks in the Task Scheduler.

- **Edit Permissions** - Allows the user to edit all user permissions. At least one user in each organization must have this function.
- **Edit System Configuration** - Allows IBM Omni-Channel Merchandising Support and IBM Omni-Channel Merchandising Operations to edit the system configuration for a company.

  Note: Edit System Configuration should be selected for IBM Omni-Channel Merchandising Support and IBM Omni-Channel Merchandising Operations users only. The application may be unstable if the system properties are set improperly.
- **Edit Users** - Allows the user to create, edit, and delete users.
- **OpenLink Administration** - Allows IBM Omni-Channel Merchandising Support and IBM Omni-Channel Merchandising Operations to administer IBM Omni-Channel Merchandising OpenLink.
- **View Jobs** - Allows the user to view jobs in the Job Scheduler que.

All applications permissions

All of the application permission descriptions are listed here.

- **Enable Manual Public Calendar Prediction** - Allows the user to manually predict promotions on the Public Calendar.
- **Enable Manual Team Calendar Prediction** - Allows the user to manually predict promotions on the Team Calendar.
- **Export Data From Applications** - Allows the user to export data from the IBM Omni-Channel Merchandising applications to a client application like Microsoft Excel.
- **Import Data Into Applications** - Allows the user to import data into the IBM Omni-Channel Merchandising applications from a client application like Microsoft Excel.
- **View All Exports** - Allows the user to view exports done by all users.
- **View All Imports** - Allows the user to view imports done by all users.
- **View Master Calendar (Enhanced) Reports** - Allows the user to view reports related to Master Calendar.
- **View Public Calendar** - Allows the user to view the Public Calendar.
- **View Team Calendar** - Allows the user to view the Team Calendar.

Price permissions

Price permissions definitions are listed here.

- **ABC Reporting and Administration** - Allows the user access to the **Corporate Financials** reports in the **Data Maintenance** page.
- **Ability to delete Zones and Zone Groups -** Allows the user to delete zone groups from the **Price Zones** page and zones from zone groups in the **Zones** page.
- **Advanced Pricing** - Used to control whether complex pricing strategies are available in the Package price type screen.
- **Approve Optimization** - Allows the user to override and approve optimized prices.
- **Disable override for Locked Products** - Disables the ability for users to override locked product prices either manually or with current retail prices.
- **DT Development** - (*IBM Omni-Channel Merchandising internal only*).

- **DT Price Internal Administration** - (*IBM Omni-Channel Merchandising internal only*).
- **DT Support** - (*IBM Omni-Channel Merchandising internal only*).
- **Edit All Categories CPI** - Allows the user to edit or delete CPIs for all categories that are created by other users.
- **Edit All Categories Product Group** - Allows the user to edit or delete product groups for all categories that are created by other users.
- **Edit Critical Data** - Allows the user to edit data that could potentially change the demand model, such as ABC data. The user can also:
  - Edit competitor weights in the **Competitor Weight** report in the **Manage Categories** page
  - Select a cost type and future cost in the **New Scenario** page
  - Override the default costs selected in the **Manage Categories** page
- **Edit Data** - Allows the user to edit the data contained in Price Management and Price Optimization, such as Line Groups.
- **Edit Default Rules** - Allows the user to create and edit the default rules in the **Rules Library** page.
- **Edit Other Optimization** - Allows the user to override and approve other users' optimizations.
- **Edit Other Scenario** - Allows the user to create, edit, or delete other users' scenarios.
- **Edit Scenario** - Allows the user to create, edit, and delete their own scenarios.
- **Edit Store Zone Structure** - Allows the user to create and edit store zones.
- **Export to Store** - Allows the user to export optimized prices to stores.
- **Express Pricing** - Allows the user to view, create, and export Express Pricing runs.
- **Franchise Pricing** - Allows the user to view reports related to franchise/transfer price, edit data and run pricing actions.
- **Incorporate Known Promotion** - Allows the user to select the type of promotional activity to use for calculating forecasts in scenarios. Users can select to use historical promotions or future promotions that have been added to the Public Master Calendar. The **Promotional Activity** column in the **Scenarios** page and **Scenario History** page will also display.
- **Manage Competitor Data** - Allows the user to create or delete competitors in the **Manage Competitors** page, and delete competitor price information.
- **Manage Cost Configuration** - Allows the user to edit or import the cost types used for categories at the SKU/Chain, SKU/Division, or Line/Zone levels in the Data Maintenance **Cost Configuration** report.
- **Manage Price Update Configuration -** Allows the user to change the cost trigger type in the **Price Update Configuration** report in the **Manage Categories** page.
- **Manage Size Class Definition -** Allows the user to create, update, and delete size classes, and change the size class set for a category in the **Manage Categories** page.
- **Manage Store Groups** - Allows the user to edit store groups.
- **Manage Subzone** - Allows the user to create, edit and delete price subzones.
- **Manage Tiered Pricing** - Allows the user to create and edit the Tiered Pricing rule. The user can also define the tier classes and families either in the **Product Details** report in the **Data Maintenance** page, or in an imported Excel spreadsheet.

- **Optimize** - Allows the user to run and edit optimizations for their own scenarios.
- **Override Prices With Current Retail** - Allows the user to override prices with the current retail price from the last data load. This option is available in the right-click context menu in the **Scenarios**, **Scenario Price Approval,** and **Production Price Approval** pages.
- **Re-approve for Export** - Allows the user to re-export an Express Pricing run for price delivery.
- **Reforecast with Base Prices** - Allows the user to reforecast scenarios using base prices.
- **Select Scenario** - Allows the user to promote an optimized scenario to production.
- **View Rule Bounds and Price Changes** - Allows the user to generate the **Rule Bound Visibility** report and view it in the **Price Change by Rule** tab in the Product Analyzer. This tab shows a graph of the rule bounds and price changes as rules in a Rules Based Pricing or Price Updated scenario are applied.

  The user must first set the **View Price Change By Rules** checkbox in the **New Scenario** page. When the Rules Based Pricing or Price Update action is completed, the report in the Product Analyzer can be opened by right-clicking on a product in a Scenario Results report, and selecting **View Price Change by Rule**. The user can click the **Play** button to visualize rule bound feasibility changes as related product prices change due to the rules.
- **View Shopper Insights Reports** - Allows the user to access Shopper Insights reports from the right-click context menu.

Promotion permissions

Promotion permission definitions are listed here.

- **Ad Zone Webservice** - Allows the user to access ad zone webservice operations.
- **Advanced Display** - Allows the user to view and utilize all Display Planning screens.
- **Allow On Calendar With Invalid Products Or PGs** - Allows the user to place promotions with invalid products and/or product groups on the Public Calendar.
- **Apply LGC Changes** - Allows the user (an administrator) to implement LGC edits proposed and saved by a user without this permission.
- **Change Offer Status** - Allows the user to change the status of an offer located in the offer management system.
- **Commit Category Plan** - Allows the user to commit category plans to the Master Calendar, and edit committed category plans. This permission should be deselected for all users in companies which have implemented Master Calendar.
- **Create Campaign** - Allows the user to create, edit, and delete campaigns. The user can also link events to the campaign.
- **Create Category Plan** - Allows the user to create, edit, and delete category plans. The user can add and remove promotions from the category plans.
- **Disable Modifying Marketing Message Product Images at Master Level** - Prevents a user from editing product images associated with a master level Marketing Message. Default is allowing user to modify product images (unchecked). Should be checked when using Marketing Message Import.
- **Display ACV Setting in Performance Summary** - Allows users to select/edit the ACV% settings for ads, displays, coupons, Open PD1, and Open PD2 in the **Performance Details** page.

- **Display Configuration** - Allows users to mange the setup and application of displays in planning promotions.
- **Display Super User** - Grants the user access to set up and control all Display Planning characteristics, including administration functionality.
- **Edit Confidence Score Threshold** - Allows the user to edit values in the Threshold column and save them.
- **Edit Critical Promotion Data** - Allows the user to view the **Daily Volume Allocation** report from the **Data** tab.
- **Edit LGC** - Allows the user to suggest changes to LGCs, but not to implement those changes.
- **Edit Old Master Calendar** - Allows the user to edit details and pull items from the Master Calendar.
- **Edit Performance Detail Group Copy Card** Allows the user to enter Performance Detail Group Copy Card in Promotion Planning rather than just in Promotion Execution.
- **Edit Promotion** - Allows the user to create, delete, edit, and predict promotions.
- **Edit Promotion Administration Detail** - Allows the user to edit the Daily Volume Allocation report from the **Data** tab under **Rules**.
- **Edit UEF** - Allows the user to view and modify User-Entered Forecasts.
- **Event Planning Configuration** - Allows the user to create and manage access statuses.
- **Export Promotion Data** - Allows the user to export promotions to an external system.
- **Lock/Unlock Promotions** - Allows the user to prevent a promotion from being edited.
- **Manage Basic Event Implementation** - Allows the user to edit SKU detail placement attributes.
- **Manage Basic Events** - Allows the user to edit SKU attributes on events, and add or remove SKUs on events.
- **Manage Manufacturer Organization** - Allows the user to access the **Manufacturer** report in **Data Maintenance**
- **Manage Product Distribution ACV** - Allows the user to access the **Manage Distribution** report in the Data Maintenance area.
- **Manage Promoted Product Groups** - Allows the user to create, edit, import, and delete promoted product groups.
- **Market Segment Series** - Allows to assign promotions only to the market segments to which they belong. The user can still delete promotions assigned to their own marketing segment and other marketing segments from blocks. There system displays a warning message before deleting promotions from other marketing segments' blocks.
- **Multi-Entry** - Allows the user to access the **Multi-Entry** area and create multi-entry promotions.
- **Offer Synchronization Webservice** - Allows the user to access offer synchronization webservice operations.
- **Optimize Promotion** - Allows the user to optimize promotions.
- **Override Public Pricing Data** - Allows the user to override the system-generated save-up-to value.
- **Place Category Plan on Calendar** - Allows the user to add a category plan to the Team Calendar or Public Calendar.

- **Post Basic Event Analysis** - Allows the user to view the **Post Event Analysis** page and reports.
- **Post Promotion Results** - Allows the user to view the **Post Promotion Results** page and reports, comparing actual promotion results to forecast numbers.
- **Pre-Calendar Promotion Workflow** - Allows the user to create and edit promotions and **Mark as Acceptable**, but does not allow the user to place events on the calendar.
- **Predict Category Plan** - Allows the user to predict category plans.
- **Promo Aggregation Type** - Allows the user to define which form of data they would like to calculate actuals data from and will ultimately impact all associated reports. Options include 1-Weekly POS (default), 2-TLog Daily, 3-None.
- **Promo Inventory** - Allows the user to see inventory data within promotions.
- **Promotion Vendor** - Allows the user vendor access to Promotion Planning & Execution.
- **Promotion Webservice** - Allows the user to access Promotion webservice operations.
- **Signage Admin** - Allows the user to view and edit reports on the **Signage Administration** page.

  Note: For users to assign signage in the performance details, the company must also enable signage functionality.
- **Use Basic Events in Create Promotion** - Allows the user to link events to promotions.
- **View Compare Category Plans** - Allows the user to view the **Compare Category Plans** page. (CP-only)
- **View Confidence Score Thresholds** - Allows the user to view the Confidence Score Threshold table but not update values.
- **View Manufacturer Cost** - Allows the user to view manufacturer cost, manufacturer revenue, and manufacturer gross profit columns in these pages and reports:
  - **Promoted Product Results** report and **Manufacturer Category Results** report in the **Compare Promotions** page
  - **Category Plan Manager** report in the **Category Plans** page
  - **Summary** tab in the **Category** page

  View Offer - Allows the user to view offers and offer reports located in the offer management system.
- **View Old Master Calendar** - Allows the user to view the pre-9.3 Master Calendar.
- **View post-EMC reports and context menus** - Allows the user to view reports and context menu options that are available to companies that have implemented Master Calendar.

  Note: When this permission is selected, the **Commit Category Plan** permission should not be selected.
- **View pre-EMC reports and context menus** - Allows the user to view reports, and context menu options that are available to companies that have not implemented Master Calendar.
- **View Promotion** - Allows the user to place events on the calendar, but does not allow creating or editing promotions.

- **View Promotion Administration Detail** - Allows the user to view the **Daily Volume Allocation** report from the **Data** tab under **Rules**.
- **View Promotion Reports** - Allows the user to view special promotion reports, including the **Promotion History** report.
- **View Share** - Allows the user to view metrics related to market share. (CP-only)
- **View Similar Promotions** - Allows the user to view the **Similar Promotions** context menu options.

OpenLink permissions

OpenLink permissions definitions are listed here.

- **Enable Access Modeling Master Data** - Enables modeling users to edit the Modeling Master template for setting the true default values and the modules that a variable is valid for. This administrative permission is only necessary for statisticians who will be doing the modeling.
- **Enable Access to Extended Product Model**- Allows the user to access extended product modeling tools.
- **Enable Attributing** - Allows attributing users to attribute in the **Edit Content** page.
- **Enable Auto-Assign New Products** - Allows the user to view the **Auto-Assign Unapproved** and **Auto-Assigned Date** column in the **Edit Content** page and exported PIF file. The user can also import the PIF file with these two columns.
- **Enable Auto-Assign New Products Task** - Enables the user to schedule the **Auto-Assign New Products** job.
- **Enable Batch Manager** - Allows the IBM Omni-Channel Merchandising Technical Integration team to access the Batch Manager pages to receive data (such as product, store, POS), validate its integrity, and make it available for the IBM Omni-Channel Merchandising applications.
- **Enable Category Delete** - Allows the user to delete categories in the **Category Manager** page.
- **Enable Category Manager** - Allows the user to access the **Category Manager** page to track and edit categories to prepare them for the modeling process. This includes attributing products, approving product category changes, and tracking categories on an on-going basis.
- **Enable Category Rename** - Allows the user to rename categories in the **Category Manager** page.
- **Enable Configure PIF Columns** - Allows the user to configure PIF columns in the **Configure PIF Columns** page.
- **Enable Copy Coefficients Across Stores Task** - Allows a modeling user to schedule the **Copy Coefficients Across Stores** task in the Task Scheduler. This task copies modeling coefficients for new products from existing stores to new stores so that they can receive forecasts across the full set of stores in the Price Management, Price Optimization and Promotion Planning & Execution applications. New products have no history in the new stores for estimating the modeling coefficients used for the forecasts.
- **Enable Create Demand Groups - Test Only** - Allows IBM Omni-Channel Merchandising Professional Services and IBM Omni-Channel Merchandising developers to create an output file that lists products in the category with a system-generated Demand Group assignment. This is done internally for testing purposes.

- **Enable Modeling** - Allows a modeling user to access the modeling pages and features within the pages. The models analyze the historical performance of products within a category to assist when predicting future performance.
- **Enable OpenLink Auto Data Loading** - Allows the IBM Omni-Channel Merchandising Technical Integration team to schedule a task in the Task Scheduler for loading inbound data automatically soon after the data files arrive at a pre-configured frequency. This workflow eliminates the need to schedule data load processes or other workflows based on the time when data files are expected to arrive.
- **Enable Product/Store Linking** - Allows a user access to the **Product Linking** and **Store Linking** pages. Product linking allows a new product to be linked to an existing product so that the new product can be forecasted and optimized in pricing activities. When a new product enters the assortment, it has no POS history from which to model consumer demand. At the store level, store linking allows a new store to be linked to an existing, modeled store and inherit the existing store's modeling coefficients for forecasting. New stores have no sales history for estimating the modeling coefficients used for the forecasts.
- **Enable Retail Cost Margin Management for CP** - Allows a user access to the **Retail Cost Margin** page. This page is used for CP customers to adjust the cost margin % for products.
- **Enable Sellable Item Rename and Delete** - Enables the user to rename and delete items from the **Sellable Items** report under **Data Maintenance**.
- **Manual Price Delivery - Allows the** IBM Omni-Channel Merchandising Technical Integration team **to do a manual price delivery of base prices through the Category Manager page in the Price application.**
- **Price Delivery Export Edit -** Allows the IBM Omni-Channel Merchandising Technical Integration team to define query (SQL statement) for base price delivery, Promotion price delivery, and custom data delivery.
- **Price Delivery Preference Setup -** Allows the IBM Omni-Channel Merchandising Technical Integration team to define the price delivery preferences, such as allowable base price changes per week or per day, the allowable maximum effective start date for Promotion prices, field and record delimiters, the export file prefix and suffix, and links to queries.
- **Recalc Equiv Units for All Products** - Users with this permission will be able to submit recalculations of equivalent units for all products. Users that do not have this permission but have the Category Manager permission will be able to submit equivalent unit calculations only for products which do not have equivalent units (for example, new products or products with an equivalent unit that was not calculated due to a lack of POS data or missing data).
- **Test Product Status Resolver** - Allows the IBM Omni-Channel Merchandising Technical Integration team to test the configurable product status resolver. It also provides the capability to get a list of products whose status will change in case the product status resolver job is submitted for a category.
- **Use Product Hierarchy Tree** - Enables the Product Hierarchy tool, allowing the user to replace standard category mappings with product hierarchies.

Markdown permissions

Markdown permission definitions are listed here.

- **IBM Omni-Channel Merchandising Support** - Allows the user to view log files and troubleshoot application performance.

- **Markdown Admin** - Allows the user to edit Markdown users and Data Maintenance reports, create and edit rules in the Rules Library, and create and edit store groups, product groups, and zone groups.
- **Markdown Junior Buyer** - Allows the user to create, edit, and delete Markdown plans and scenarios, and predict and optimize Markdown scenarios.
- **Markdown Senior Buyer** - Allows the user to create, edit, and delete Markdown plans and scenarios, predict and optimize Markdown scenarios, and review and approve Markdown plans and scenarios.

PRA permissions

PRA permission definitions are listed here.

- **Promotion Response Analysis** - Allows the user to access the **Promotion Response Analysis** panel in the **Product Analyzer** utility.
- **Price Response Analysis** - Allows the user to access the **Price Response Analysis** panel in the **Product Analyzer** utility.

By default, both PRA permissions are set for Promotion Planning & Execution users. Only the **Price Response Analysis** permission is set for Price Management and Price Optimization users. These default permissions can be changed for both applications. If neither PRA permission is set, the user cannot access the **Product Analyzer** utility.

Creating roles

Use this procedure to create a new role.

Procedure

1. Choose **Admin** > **Access > Roles**. The **Roles** page opens and lists standard roles, such as Category Manager and Pricing Analyst, and other roles that have been created in your organization.
2. Click **New Role**. The **New Role** page opens. To navigate between the sections on this page, you can either scroll, or click the links on the left side of the page.
3. Enter a name for the role in the **Role** text box.
4. Set the user administration permissions that the user will be able to do in the **User Administration** section.
5. Set the application permissions that the user will be able to do in the application sections.
6. Click **OK** to return to the **Roles** page. The new role appears in the list.

   The role is also available in the **User Permission** page (choose **Admin** > **Access** > **Users**, right-click on a user, and choose **Edit User Permission**).

   Related Topics

   "User administration permissions" on page 198

   "Price permissions" on page 199

Editing roles

Use this procedure to edit roles.

Procedure

1. Choose **Admin** > **Access > Roles**.

2. Right-click on the role you want to edit, and select **Edit Role**. The **Edit Role** page opens.
3. Set or clear the user administration permissions that the user will be able to do in the **User Administration** section.
4. Set or clear the application permissions that the user role will be able to do in the application sections.
5. Click **OK** to return to the **Roles** page**.**

Viewing users assigned to a role

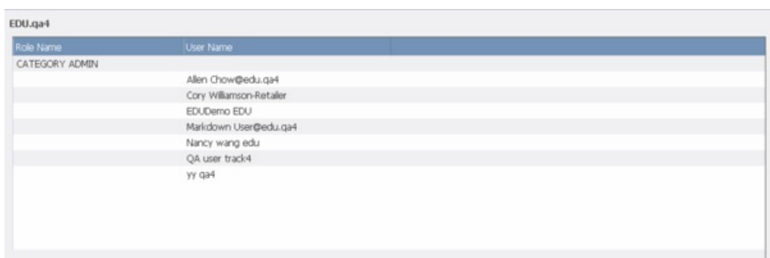
Use this procedure to view users assigned to a role.

About this task

You may want to view all users with a specific role, so that you can decide how to assign the roles across your organization. Administrators with the **Edit Permission** permission can view users assigned to a selected role.

Procedure

1. Choose **Admin** > **Access > Roles**.
2. Right-click on a role, or shift-click on multiple roles, and select **View Users.** The **View Users** page lists all users assigned to the roles.



3. From this page, you can right click on a role to edit or delete it, or right click on a user to view or edit administration details such as the profile or permissions.

Subscribing to alerts

Use this procedure to subscribe to alerts.

About this task

Users can subscribe to application alerts using the **Alert Subscription** page. Alerts are generated by various events and activities in the application. Examples of events are when prices are approved for export, CPIs are automatically recalculated when competitive data is imported into IBM Omni-Channel Merchandising OpenLink, or when new vendor costs and competitive prices from IBM Omni-Channel Merchandising OpenLink have replaced the old costs and old competitive prices in the Price application.

Users can receive alerts for jobs or tasks that only they have initiated or alerts when anyone in the company has initiated the activity. This option is useful for users working in teams or for managers who want to be alerted when a specific activity is executed by anyone. Note that not all alerts can be filtered by sender.

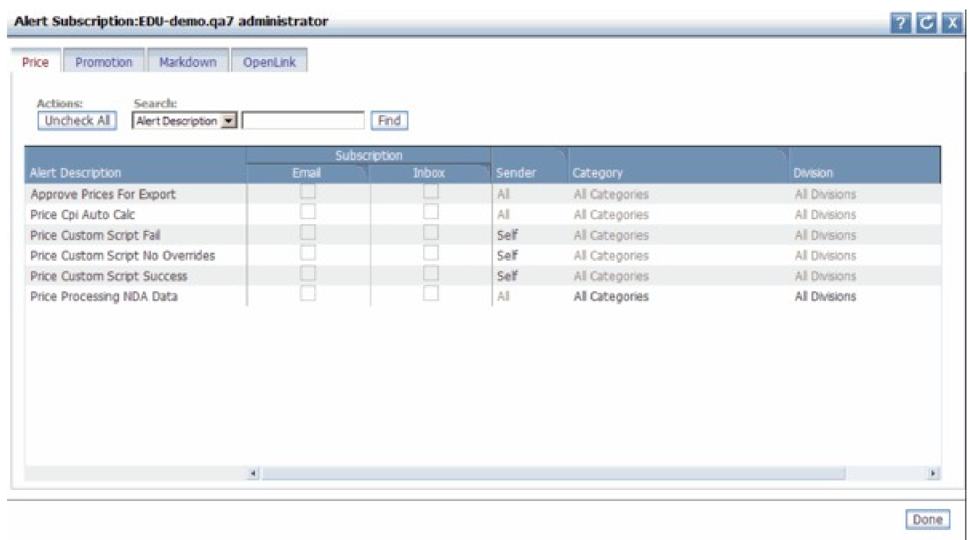
Users have two delivery options: Inbox or Email. The Inbox option allows users to receive alerts in the Alert Inbox. The Email option allows users to receive alerts via email using the email address stored in their user profile.

Administrators can subscribe users within their company to alerts or edit the alerts from the **Users** page. See "Creating new users" on page 183 for information about setting up new users in this page. Administrators can also set up email aliases in the **Notification Aliases** page when they want a group of users to receive the alerts.

Note: By default, users are not subscribed to any alerts. If a user does not subscribe to any alerts, the user will not receive any notifications from any of the IBM Omni-Channel Merchandising applications. For example, if a user received 'PIF export complete' messages in the email inbox every time a PIF was exported in release 9.1, in release 9.2, the user will not receive these messages in the email inbox unless the user has explicitly subscribed to the alert in the Alert Subscription page. The same applies to other notifications that arrived via email such as prediction completion alerts.

Procedure

1. Choose **Alert Subscriptions** from the **Tools** menu.



2. Select an application tab to view the available alerts.
3. In the **Subscription** column for each alert, set the **Email**, **Inbox**, or both checkboxes for the mode of delivery.
4. Click in the **Sender** column to choose **Self** to receive the alert only when you have initiated the activity, or **All** to receive alerts when anyone in the company has initiated the activity.
5. Click in the **Category** and **Division** columns to filter the alert for one or more categories and divisions. Only certain alerts can be filtered by category or division.
6. Click **Done** to save your changes and exit the page.

Related Topics

"Creating new users" on page 183

"Setting up email notification aliases" on page 209

Setting up email notification aliases

Use this procedure to set up email aliases to receive alerts. The **Administer Notification Aliases** permission is required to perform this task.

About this task

Administrators can set up email aliases when they want alerts sent to a group of people at once instead of to an individual user. Pre-defined email aliases for groups of users can be registered in the **Notification Aliases** page.

For each alias, the administrator can configure the alerts that the alias should receive in the same way that alerts are subscribed for an individual user.

Procedure

1. Choose **Admin** > **Access > Notification Aliases**. The **Notification Aliases** page opens.
2. Click **New Alias** to open the **New Alias** page.
3. Enter the alias name, such as Pricing Analysts in the **Alias Name** field, and the email address.
4. Click **Save** to save the changes and return to the **Notification Aliases** page.
5. Select an alias name, right-click, and select **Edit Alert Subscriptions** in the context menu. Select or edit alerts in the same way as for individual users.

Setting alert subscriptions

Use this procedure to subscribe to receive alerts when you Import Market or New Product from Excel.

About this task

When you Import Market or New Product from Excel, you can subscribe to receive alerts when an import Started, Failed, and/or Completed.

Procedure

1. Click on the toolbox icon at the top navigation bar on any of the pages. The **Alert Subscription** pop-up window opens.
2. Click the **Assortment** tab.
3. Using the check-boxes, select the type of import alerts you would like to receive.
   - Checking a box under the **Email** column will send the alert to the email address registered to the application.
   - Checking a box under **Inbox** will send the alert to your Alert Inbox.
   - If you check a box for the Assortment Import failed notification, you will receive email with the link to the Import Error Log file.
4. When you are done selecting the type of alerts you would like to receive, click **Done**.

Selecting the sender for alert subscriptions

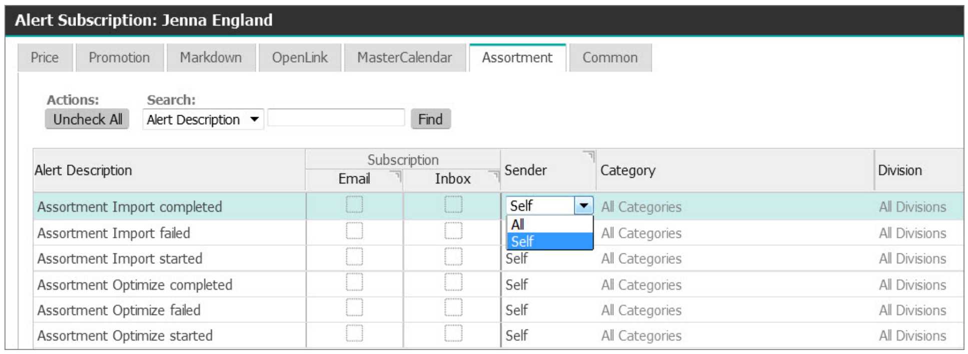
Use this procedure to select whether you want an alert subscription to be sent to all users or only to you.

About this task

You can select whether you want an alert subscription to be sent to all users or only to you.

Procedure

1. Navigate to the **Assortment** tab in the **Alert Subscription** pop-up window.
2. Click the **Sender** column adjacent to the desired Alert.
3. Select **Self** from the drop-down menu to send the alert subscription only to yourself. Select **All** to send it to all users subscribed to alerts for that application.



Chapter 9. Getting help and support

IBM Omni-Channel Merchandising is designed to be user-friendly, but every once in awhile you might have a question on a feature. IBM Omni-Channel Merchandising offers multiple help and support solutions which are designed to assist you in finding the answers you need quickly.

Related Topics

“Release notes”

“Online help”

“Printable user guide” on page 212

“Contacting IBM Omni-Channel Merchandising customer support” on page 213

“Logging a support case” on page 214

“Disabling pop-up blockers in Internet Exporer” on page 218

“IBM Omni-Channel Merchandising education and Training” on page 220

“Documentation questions and comments” on page 220

Release notes

In order to support quarterly upgrades to IBM Omni-Channel Merchandising customers, Release Notes® are posted directly in the application under the **Help** menu. Each Release Notes document contains the following information:

- **Release Overview** - The general overview and focus of the current IBM Omni-Channel Merchandising application release.
- **New Features** - Summary descriptions of the new release features.
- **Fixed Bugs** - IBM Omni-Channel Merchandising strives to close all customer bugs as soon as possible. Fixed bugs are documented in the Release Notes.
- **Known Issues** - Descriptions of known issues with the current release and any workaround instructions. Known issues will be fixed in subsequent releases.

Online help

Every IBM Omni-Channel Merchandising software service offers a help function. This help function is designed to automatically present information that is pertinent to the screen you are currently viewing.

Related Topics

“Accessing online help”

“Navigating help” on page 212

Accessing online help

Use this procedure to access online help.

About this task

The Online Help will open in another window. If you have a pop-up blocker on your computer you will need to disable it before using the Online Help. See "Disabling pop-up blockers in Internet Exporer" on page 218 for more information.

Procedure

1. Access Online Help by clicking on the question mark icon in the upper right corner of the page.
2. In the drop-down menu, click on **Online Help** to open the Online Help.

Navigating help

The Online Help system is designed to mimic the layout of a printed book. You can navigate from one section to another by clicking on the book icons on the left panel. Clicking on a book chapter opens it to reveal topic pages. Click on a topic page to bring up the details in the right panel.

Above the book pages are four main navigation buttons: **Contents**, **Index**, **Search** and **Favorites**.

- **Contents** - This button will show all of the available Online Help topics in book form. This is the default view when you first open Online Help.
- **Index** - This button lists all of the available Online Help topics in alphabetical order.
- **Search** - This button allows you to search for a specific term in the Online Help. Enter the search term in the box and click **Go!** to display the results.
- **Favorites** - This button allows you to save a short list of specific topics to a personal quick reference list. You can access your saved favorites at any time by clicking on the Favorites button.

Printable user guide

Each of the IBM Omni-Channel Merchandising software services has a complete user guide which is accessible as an Adobe Acrobat PDF file. The PDF file can be viewed electronically or printed out and read as a traditional paper manual.

To access the PDF file, look for the Adobe Acrobat icon in the upper-right corner of the Online Help screen. Click on the Adobe Acrobat icon to load the PDF.

In order to properly view the PDF, you will need to have the latest version of Adobe Acrobat Reader installed on your system. You can download Adobe Acrobat Reader from Adobe's website at:

http://get.adobe.com/reader/.

Contacting IBM Omni-Channel Merchandising customer support

Personalized assistance is available directly from IBM Omni-Channel Merchandising Customer Support for any issues you may encounter.

The IBM Omni-Channel Merchandising Customer Support team can be reached via phone, email or the web.

When contacting support you should have the following information available:

- Your name
- Your company
- Your phone number
- Detailed description of your issue
- Priority level of issue

Related Topics

"Phone support"
"Web support"

Phone support

IBM Omni-Channel Merchandising Customer Support is available via phone at +1-866-460-0501.

This is a toll free number for US-based customers. If you are calling from overseas, please be aware that your phone company may assess charges for the call.

Phone hours

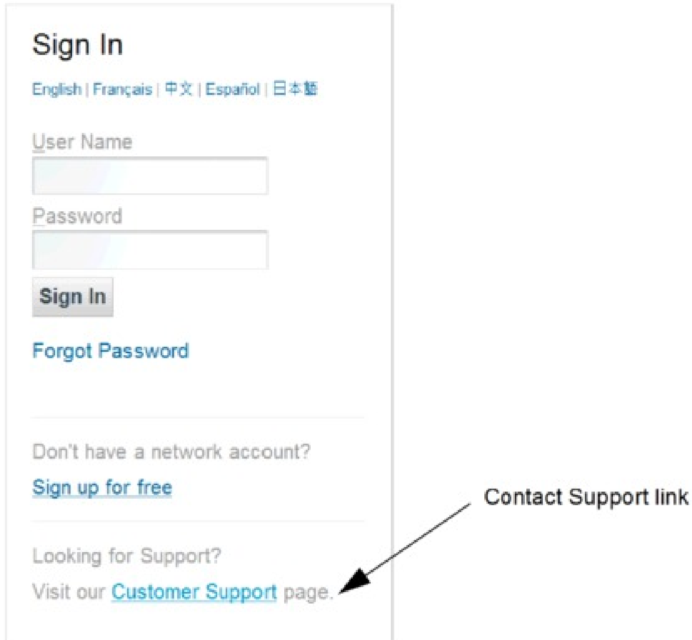
IBM Omni-Channel Merchandising offers three Customer Support teams in order to ensure maximum availability.

- The USA-based support team is available Monday through Friday from 6am to 6pm PST.
- The Europe-based support team is available Monday through Friday from 8am to 5pm CET.
- The Japan-based support team is available Monday through Friday from 8am to 5pm JST.

IBM Omni-Channel Merchandising observes Daylight Savings Time. If your location does not observe Daylight Savings Time, please adjust the times appropriately.

Web support

IBM Omni-Channel Merchandising Customer Support can be reached from the IBM Omni-Channel Merchandising login page at www.mydt.demandtec.com.



In order to connect to the Customer Support portal where you can begin logging cases, you will need to first log in using a free web support account.

If you already have a web support account, you will need to request a new password by entering your username and then clicking the **Forgot your password?** link. A temporary password with log in instructions will be sent to your email address. If you do not yet have an account, register on the Customer Support web portal to gain access.

Related Topics

"Logging a support case"

"Reviewing a submitted case" on page 217

"Using the customer support portal" on page 217

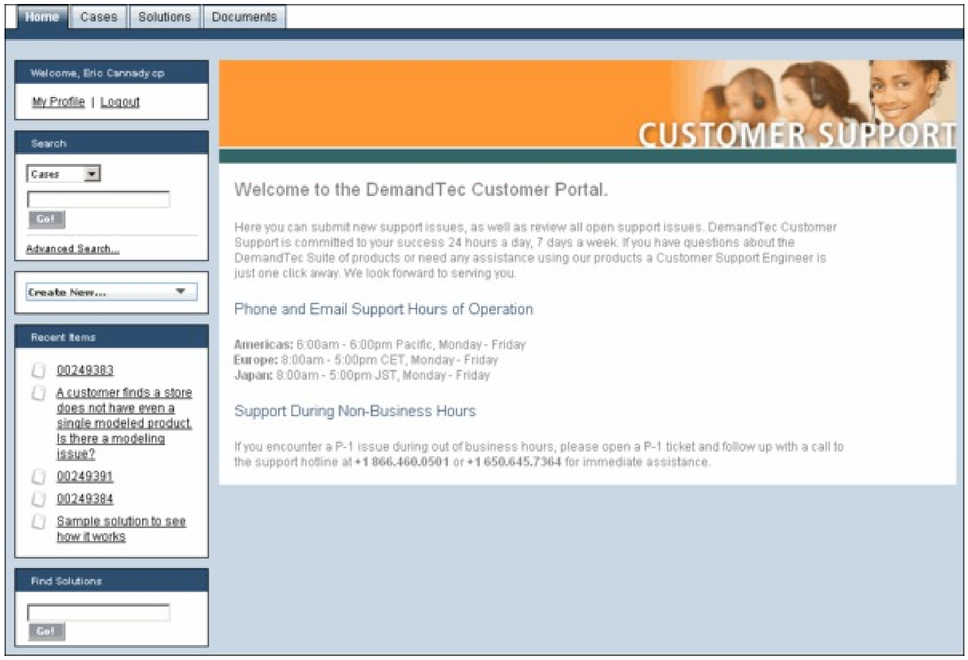
Logging a support case

Logging a support case with your feedback, problem, or question is a simple process. You will also receive email notifications when new information about resolving your issue is available.

About this task

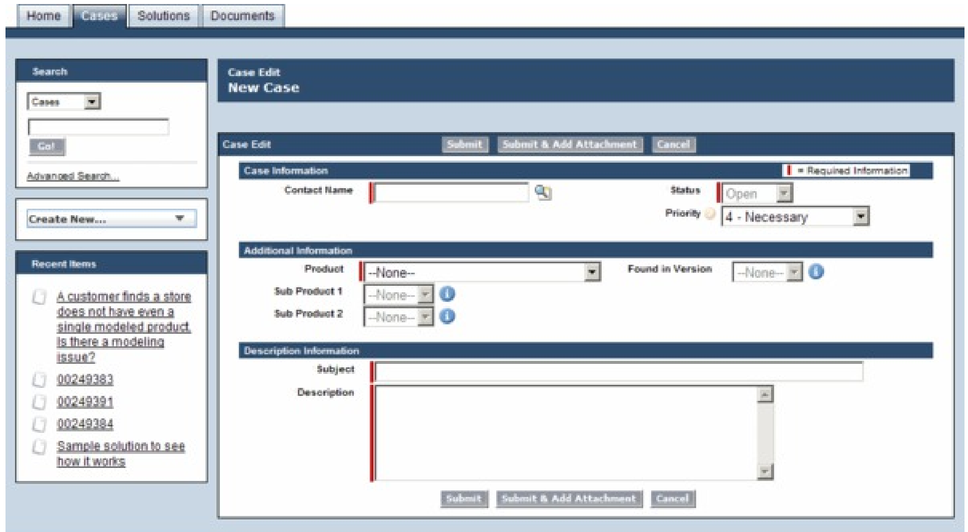
Procedure

1. Once you have logged in successfully, you will see the IBM Omni-Channel Merchandising Customer Support portal.



2. To enter a support case, click the **Create New** drop-down list, and select **Case**.

3. Enter the information in the **New Case** page. The required fields have a red vertical bar next to the fields.



- **Contact Name** - Enter your full name (*required*)
- **Status** - (*Required by default, but read-only*)
- **Priority** - Choose a priority level for the issue:
  - **P1 Critical** - You cannot use the application, or the implementation schedule will be severely impacted by a lack of system stability
  - **P2 Urgent** - Your ability to perform common business functions is hampered
  - **P3 Important** - Minor features are not functioning as expected
  - **P4 Necessary** - You have general inquiries and/or feature requests
  - **P5 Modeling Request** - You have a modeling request
- **Product** - Choose the IBM Omni-Channel Merchandising application you were using when the issue was found (*required*)
- **Found in version** - Choose the version of the IBM Omni-Channel Merchandising application
- **Sub Product 1** - Choose the related area of the IBM Omni-Channel Merchandising application
- **Sub Product 2** - Choose the related area of the IBM Omni-Channel Merchandising application (*if available*)
- **Subject** - Enter a meaningful title for your issue (*required*)
- **Description** - Enter a detailed description of your issue (*required*). Include a list of all the steps required to replicate the issue. This will help Customer Support diagnose the problem and respond to you in a timely manner.

4. Click **Submit**. You will see a confirmation that your request was received with a ticket number. Your case will be stored in your customer portal, which you can later review, make changes, and then re-submit. See "Reviewing a submitted case" on page 217 for detailed information.
5. Alternatively, click **Submit & Add Attachment** to include an attachment to help illustrate the issue, such as a screen capture, and submit. The size of the attachment can be up to 5 MB.

Related Topics

"Reviewing a submitted case" on page 217

Reviewing a submitted case

You can open and review your cases that you previously submitted to Customer Support. You can also edit cases and re-submit them, or close cases that no longer need attention.

Procedure

1. Log in to the IBM Omni-Channel Merchandising Support Center web site.
2. Click the **Cases** tab. A summary of your recently viewed cases displays in the center of the customer portal.

   In the **View** drop-down list, you can choose to view all of your cases, only your open cases, or your recently viewed cases (the default).
3. Click the case number to open the case. You can click the **Edit** button in the **Case Detail** section to edit details of your issue and re-submit. You can also enter new comments, add additional attachments, view suggested solutions, and review the current progress of the support case.
4. Click the **Close Case** button to close the case if it is no longer valid, or does not require feedback from Customer Support. You cannot delete cases from the portal.

Using the customer support portal

The IBM Omni-Channel Merchandising Customer Support portal provides a central location for all your support needs. The tabs at the top of the page let you easily access different types of information.

Tabs

- **Home** tab - The main page of your customer portal. You can click the **My Profile** link to edit or update your user profile information.
- **Cases** tab - The page to create, edit, and view cases.
- **Solutions** tab - Search and view solutions to common issues. You can choose to view all solutions, most commonly viewed, or only those which you have

recently viewed. You can also search cases by the first letter in the case title. Solutions can be searched directly from the **Find Solutions** search field at the bottom of the **Home** tab.
- **Documents** tab - Search and view supplemental documents to help with using the IBM Omni-Channel Merchandising applications or learning more about how Customer Support processes and manages cases.

Search

The **Search** area is available in the sidebar of all tabs within the portal. You can search for your cases using a keyword that you enter, or an exact phrase in advanced search.

Advanced search searches additional fields in cases, including notes, descriptions, and comments. It allows you to do the following:
- Use operators, such as AND, OR, and AND NOT to refine your search.
- Add quotation marks around multiple keywords to perform an exact phrase match, such as "receive error when enter values in the Edit field".
- Add an asterisk to the end of your keyword to search for items that start with the word, such as receive*.

Create New Case

The create new case drop-down list is available in the sidebar of all tabs within the portal.

Recent Items

You can open your recently viewed items, such as cases, documents, or case solutions.

Disabling pop-up blockers in Internet Exporer

Use this procedure to allow pop-ups for a website.

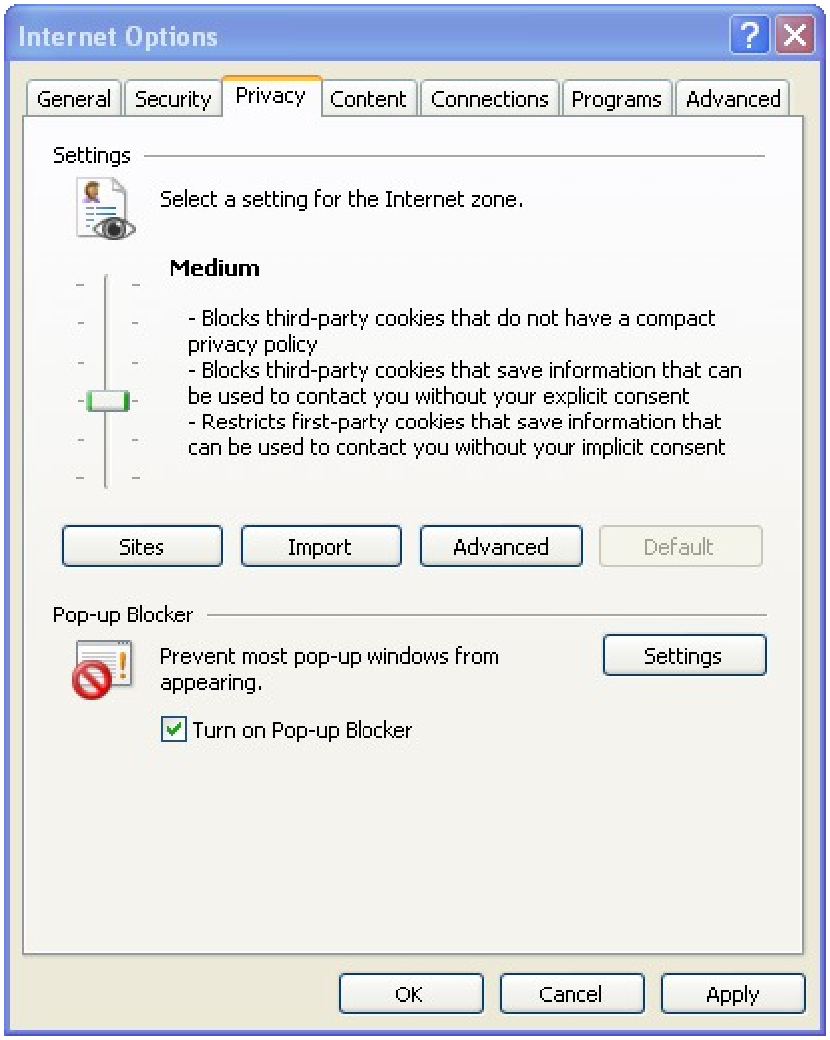
About this task

If you are using software that disables pop-up browser windows, you may need to disable this feature in order to successfully use IBM Omni-Channel Merchandising. IBM Omni-Channel Merchandising uses pop-up windows in various places throughout the application, such as when you export files to Microsoft Excel.

To allow pop-ups for a particular website like IBM Omni-Channel Merchandising you need to add that site to an approved sites list.

Procedure

1. Open Internet Explorer 7.
2. Choose **Tools** > **Internet Options** from the menu bar. The Internet Options dialog box displays.
3. Click the **Privacy** tab.



4. You can see the Pop-up Blocker settings at the bottom of the window. If you want to completely disable the Internet Explorer 7 Pop-up Blocker ensure that the box next to **Turn on Pop-up Blocker** is unchecked. If you want to keep the Pop-up Blocker enabled, but add IBM Omni-Channel Merchandising to an approved white list, click the **Settings** button. A white list is a list of approved sites which are ignored by the Pop-up Blocker and allowed to function without interference. You may be familiar with the concept of a white list from your email program which allows you to add selected email addresses to a white list so those addresses can then bypass the spam filter. This works in a similar manner.
5. In the Pop-up Blocker Settings dialog box type the name of the site (Ex: mydt.demandtec.com for IBM Omni-Channel Merchandising and click the **Add** button.

   Note: These instructions are for Internet Explorer 7. If you are using third party pop-up blockers, such as software from Google, MSN or Yahoo!, the instructions may differ.

Related Topics

"Single use disable for pop-up blockers" on page 220

Single use disable for pop-up blockers

If you do not want to disable the pop-up blocker on your system, you can use the Control key as a single use shortcut to temporarily disable the Internet Explorer 7 pop-up blocker. Simply hold down the Control key while clicking on any web link.

IBM Omni-Channel Merchandising education and Training

IBM Omni-Channel Merchandising Education offers in-depth training sessions on all software services.

You may attend release training by viewing e-presentations that explain the new features for each release. These are available via a web-based e-learning system which is available to you anytime that is convenient for you. Contact your project leader or your IBM Omni-Channel Merchandising trainer for more details.

Documentation questions and comments

IBM Omni-Channel Merchandising encourages you to contact us with any suggestions, ideas, questions or comments regarding the Online Help.

IBM Omni-Channel Merchandising encourages you to contact us with any suggestions, ideas, questions or comments regarding the Online Help. You can reach the Technical Publications team directly at jessicae@us.ibm.com.

Chapter 10. Glossary

This glossary provides terms and definitions for the IBM Omni-Channel Merchandising software and products.

The following cross-references are used in this glossary:

- *See* refers you from a nonpreferred term to the preferred term or from an abbreviation to the spelled-out form.
- *See also* refers you to a related or contrasting term.

For other terms and definitions, see the IBM Terminology website (opens in new window).

"A" "B" on page 222 "C" on page 223 "D" on page 226 "E" on page 226 "F" on page 227 "G" on page 228 "H" on page 228 "I" on page 229 "K" on page 229 "L" on page 229 "M" on page 230 "N" on page 231 "O" on page 231 "P" on page 232 "R" on page 234 "S" on page 234 "T" on page 235 "U" on page 236 "V" on page 236 "W" on page 237 "Z" on page 237

A

ABC See activity based costing.

accrual fund
A method of funding which is used to allocate trade funds between a manufacturer and a retailer.

activity based costing (ABC)
An accounting method used to measure the cost and performance of activities, resources, and cost objects.

ACV percentage
See historical store participation.

ad allowance
A sum of money paid to a retailer from running a series of advertisements for the manufacturer. The allowance is determined by the quantity of product purchased from a manufacturer.

ad zone
A collection of stores that offer the same advertised promotion.

allowance
A discount given to a retailer by a manufacturer in the form or monies, product discounts, shipping discounts, and so on.

allow backhaul
A Boolean field that indicates if a product can be returned to the supplier on the supplier's truck in the case of an unsold or broken product.

anchor class
A collection of products with similar anchor prices.

anchor price
A pre-established price point around which price fluctuations are determined.

application service provider (ASP)
A vendor that provides an outsourced function to leverage scale economies, for example, hosting services.

ASP See application service provider.

assortment
The variety of products within a merchandise category, group or department.

assortment optimization
A marketing strategy tool that determines the best assortment in order to maximize effectiveness of a scenario.

at-large rule
A constraint that applies to an entire scenario.

attribute
A characteristic or trait of an entity that describes the entity; for example, the telephone number of an employee is one of the employee attributes.

B

backhaul
An additional pickup and delivery in the reverse direction made while a vehicle is returning to the starting site after it has made a delivery.

backhaul allowance
A sum of money paid to a retailer that is determined by the quantity of product moved from the manufacturer's location to a retailer's location by the use of contracted trucks.

base price
The manufacturer's suggested retail price.

base support
The total baseline volume exposed to a promotion.

basis point
The smallest measure used to quote financial return. One basis point equals one one-hundredth of a percent. For example, the difference between a net profit margin of 2.25% and 2.50% percent is 25 basis points.

Bayesian inference
A statistical inference in which probabilities are interpreted as degrees of belief.

Bayesian shrinkage
A Bayesian methodology whereby information is borrowed across products and stores in order to intelligently reduce model estimates and moderate extreme values.

block See store zone.

BOGO
See buy-one-get-one free.

brand The source of a relevant, distinctive and enduring "promise of value" to a specific set of customers. The promise should be relevant to those customers and be differentiated from those of competitors. A powerful brand influences a marketplace, demonstrates leadership and quality, and is familiar and trusted.

brand class
: A collection of brands based of set of similar traits or attributes. For example, generic sodas can be placed in a private label brand class and Coke in a national label brand class.

brand class rule
: A constraint imposed on members of a brand class that determines the price relationship among members.

brand family
: A subset of a brand class.

brand manager
: A person who charts the strategy and tactics surrounding the brand plan. For example, the brand manager tracks which new products get developed and which marketing mix events will occur.

brand rule
: A constraint imposed on members of a brand that determines the price relationship among members.

breadcrumb trail
: A navigation technique used in a user interface to give users a way to keep track of their location within the program or documents.

business rule
: A constraint on optimization that allows rules to describe strategies or policies that are important in guiding the outcome of the optimization to suit the customer's needs.

buying allowance
: A sum of money paid to a retailer that is determined by the quantity of product cases purchased by the retailer.

buy-one-get-one free (BOGO)
: A promotion tactic often used to give consumers an incentive to buy and stock up on a product.

C

calculation context
: A configuration setting that forecasts a promotion in a specific context in order to account for historical levels of promotion on non-promoted products.

cannibalization
: The negative effect on the sale of a product when a consumer purchases one product instead of another. For example, when a new flavor of yogurt is introduced the increased sales of the new flavor affect the sales of the other flavors of yogurt.

case allowance
: A discount of a fixed dollar amount on the price of a case of a product. For example, the manufacturer offers a reduction in the price per case of product in order to offload inventory quickly.

case cube
: The volume of a product when packed in a case form.

case list cost
: The manufacturer's cost of a product in case form.

case pack
The number of units of a product when packed in case form.

case volume lift percentage
The percentage of cases that will be sold as a result of a promotion.

category
A group within a system of classification whose contents share similar properties.

category management
The process of determining the price, promotions, assortment, and the shelving of a product category.

category manager
A person responsible for all merchandising activities for a category of products, including price, promotion, placement, and assortment.

category plan
All promotions for one category that intersect in time with a specified date range.

chain A branded collection of stores with a single owner.

client The user interface application installed at the customer site.

client product key
The customer's unique SKU identifier for this product.

club card
See loyalty card program.

coefficient
A number representing the relationship between a dependent variable (for example, sales volume or share) and an independent variable (for example, base price or discount).

COGS See cost of goods sold.

comparative shopping (comp shop)
The act of verifying the price of a product or service of a competitor.

competitive price
A product price that is perceived to be a good value compared to what the competition is charging for the same product.

competitive product
A product that is sold profitably and is able to maintain its place within a market of similar products.

competitor
A retailer who is identified when price matching an item, and who may be offering the item at a lower price than that offered by the corresponding enterprise.

competitor price rule
A constraint imposed on the price of a product or service in order to stay within the price range of a retail competitor.

complementary product
An item that a consumer buys because it is related to another product. For example, consumers who buy hot dogs will usually buy hot dog buns.

comp shop
See comparative shopping.

consideration set
The set of brands that a consumer considers when making a product purchase decision.

constraint
See business rule.

consumer
An individual who purchases products or services from an enterprise.

consumer demand model
A system of equations that predicts how much consumers will buy depending on factors such as price, seasonality, and promotions.

consumer loyalty
The affinity that a consumer has for a product or a retailer that makes them more likely to purchase a specific product, or shop at a specific store.

consumer response model
See consumer demand model.

consumer unit
An abstracted sales unit that can aggregate multiple unique UPCs into what a consumer considers a single item. For example, different UPCs for the various brandings of the same product can be linked by a consumer unit.

contribution margin
The remaining dollar amount in an adjusted gross margin after variable costs are subtracted.

cost The amount of money paid to a manufacturer for a product.

cost class
A collection of products with similar or related costs.

cost family
A subset of a cost class.

cost of capital
The amount of money associated with carrying merchandising inventory.

cost of goods sold (COGS)
The amount of money that a retailer pays a manufacturer for a product.

cost type
The highest-level category to which costs are assigned in budgeting and accounting, for example, hardware, software, people, accommodation, external and transfer.

CQD See cumulative quantity discount.

cross elasticity
A measure of relatedness among the purchase of products that is expressed in terms of a numeric value. The relationship is expressed by a positive value if the products are related and a negative value if they are unrelated.

cross elasticity of demand
See cross elasticity.

cumulative quantity discount (CQD)
An allowance that varies with volume. For example, the retailer will receive a payment of $1.00 per case for the first 1000 cases, or $2.00 per case for the next 1000 cases.

customer
A person or organization, internal or external to the producing organization, who takes financial responsibility for the system. In a large system this may not be the user. The customer is the ultimate recipient of the developed product and its artifacts.

D

deal period
A period of time in which a retailer qualifies for the manufacturer's discounted price.

deal term
Stated conditions, restrictions, and exclusions on a deal.

demand curve
The demand for a product over a price range across time.

demand group
A collection of products with a high cross elasticity. The price and promotion of one item in the group directly affects that demand for the other items.

direct store delivery (DSD)
The shipment of a product from the manufacturer to the retailer bypassing distributors and wholesalers.

display media
Various methods for attracting consumer attention to a particular product.

drop ship method
A method of product shipment used to reduce inventory costs by having the manufacturer ship an order directly to the consumer on behalf of the retailer.

DSD See direct store delivery.

dynamic product group
A collection of products with similar or related costs to which new products are automatically added or removed based on a criteria filter.

dynamic store group
A set of stores that are treated as one unit to which stores are added or removed automatically based on criteria filter.

E

EDLP See everyday low pricing.

elasticity
A measure of consumer responsiveness in terms of quantity of a product purchased in relation to the increase or decrease of the product's price.

elasticity of demand
The rate at which demand changes for a change in price. Change in demand divided by change in price.

end cap
A display at the end of an aisle.

end-of-life date
The date in which the normal demand for a product falls to a value very close to zero.

equivalent price difference
A measure of the difference between the initial equivalent price and the optimal equivalent price.

equivalent price percentage change
A measure of the difference between the initial equivalent price and the optimal equivalent price in terms of percentage change.

equivalent retail price
The shelf price of a product divided by the standardized unit of measure.

equivalent unit
A standardized measure of volume based on a process of equivalization. See also equivalization.

equivalent volume
The relative number of equivalent units sold. For example, if two 12-packs of Coke are equal to one equivalent case, and two equivalent cases are sold, then the equivalent volume is two.

equivalent volume difference
The difference between the initial equivalent volume and the optimal equivalent volume in absolute terms.

equivalent volume percent change
The difference between the initial equivalent volume and the optimal equivalent volume in terms of percentage.

equivalization
The assignment of a standardized unit of measure to a product based on the product's description and the spread of sizes or counts that apply to that description. For example, both one case of Coke and two 12-packs of Coke are equal to one equivalent case. See also equivalent unit.

event A group of promotions arranged in a particular theme.

everyday low pricing (EDLP)
A performance detail type which is used when a price change lasts more than eight weeks or significantly longer than a temporary price change.

F

facing The number of items on a shelf that are facing the customer. Facing provides a measure of store space allocated to a single product.

facing optimization
A process that is used to determine the most effective product facing.

feature
Part of a product that is either included with the product or can be ordered separately.

financial modeling
See activity based costing.

fixed cost
An expenditure that does not vary with the production volume, such as rent, equipment, buildings, property tax, and some salaries.

fixed trade fund
Monies that the manufacturer pays to the retailer to secure a display or an advertisement.

forecast
A function that can provide a prediction of future performance of a managed system using past data collected on that managed system.

form class
A group of products that share the same form, such as a liquid or a solid.

forward buy
A purchase of an amount of product that exceeds immediate needs in order to take advantage of favorable pricing offered for promotions.

franchise pricing
A set of functionality which allows users of Price Management and Price Optimization to set transfer prices.

freight allowance
A sum of money paid to a retailer that is determined by the quantity of product moved from the manufacturer's location to a retailer's location by manufacturer owned trucks.

G

gross margin
See gross profit.

gross margin rule
A constraint imposed on the optimization to stay within a particular gross margin range.

gross profit
Revenue minus cost.

group ID
A system-generated grouping identifier for ad slots that should appear together.

H

historical accrual fund
The amount of trade funds spent by a particular account. The amount spent is determined by the number of cases a retailer buys from the manufacturer in the previous year.

historical store participation
A metric that is used to estimate the proportion of stores that will execute a promotional activity.

hurdle rate
The minimum rate of return for a new product investment.

hurdle rate rule
A constraint imposed on the minimum rate of return on a new product investment.

I

incremental case
The number of cases that the retailer will sell from the promotion.

incremental manufacturer profit
Any additional manufacturer profit generated from a promotion.

incremental manufacturer revenue
Any additional manufacturer revenue generated from a promotion.

incremental unit
The number of units that a retailer sells throughout a promotion period.

incremental value
A measure of incremental profit change.

incremental volume
The cumulative growth of a product group in terms of volume as a result of adding additional products to the group.

K

key performance indicator (KPI)
A quantifiable measure that is designed to track one of the critical success factors of a business process.

KPI See key performance indicator.

L

labor rate
An hourly labor cost including wages and benefits.

last suggested price (LSP)
The recommended price from the last pricing action, such as an optimization, rules pricing, price update, or reforecast.

LG See location group.

LGC See location group class.

license
A legal agreement that authorizes the use of proprietary information including, but not limited to, copyrighted or patented information.

lift Statistical measure that is the ratio between the joint probability of two variables with respect to their expected probabilities under the independence assumption.

line A company's related products that are marketed individually.

line group
A collection of related products within a product line.

line price class
A group of related products that share a fixed price.

line price group
See line price class.

line pricing
The assignment of a fixed price across similar products.

live accrual fund
The amount of trade funds spent by a particular account. The amount spent is determined by the number of cases a retailer buys from the manufacturer in the current year.

location group (LG)
A hierarchical group of locations that can be selected for a promotion.

location group class (LGC)
A hierarchical group of location groups.

location key
A number assigned to a store that is assigned a particular SKU number.

logistical unit
A source of information that indicates how a product is to be shipped to a retailer.

loyalty card program
A program that consumers sign up for to enjoy discount or reward programs in return for tracking of consumer behavior patterns.

LSP See last suggested price.

M

magic price
A price point at which the demand for a product increases dramatically.

manufacturer contribution margin
The manufacturer's gross profit minus trade spending.

manufacturer cost change
A manufacturer-driven change in the purchase price of a product.

manufacturer post-trade cost
The weighted manufacturer's product cost after factoring in trade spending for one unit volume.

manufacturer pre-trade cost
The weighted manufacturer's product cost prior to factoring in trade spending for one unit volume.

manufacturer trade fund ROI
The change in the manufacturer's gross profit due to the promotion divided by the trade spending.

markdown
The amount by which the price is reduced to increase the sales of a product.

market
A set of potential purchasers/customers having common requirements who are willing and able to spend money to satisfy their wants and needs.

master calendar
A merchandising activity calendar.

measurement point
A point along the supply chain where a movement allowance is calculated.

merchandising
The various aspects related to the promotion of a product. This includes coordinating production and marketing, developing advertising, managing product displays, and sales strategies.

modeling
A technique that is used to predict the future behavior of customers based on historical consumer data and historical store promotions.

multibuy
A TPR that allows the consumer to purchase several items for the equivalent price of fewer items. For example, three for the price of two. See also multiple.

multiple
A price statement in which multiple products are offered at a particular price. For example, two products are offered for $1.00. See also multibuy.

N

net margin
See net profit.

net profit
Gross sales minus cost of goods sold, cost of operations, taxes, interest, and depreciation.

non-performance allowance
Additional funding from the manufacturer to the retailer that is not tied to a promotion. Some examples are freight allowance, backhaul allowance, spoilage allowance, and buying allowance.

O

offer The price of a product, in one or more currencies, along with a set of conditions such as an effective time range or an acceptable quantity range, which must be satisfied in order to use the price.

off-invoice
The amount of money that the retailer has earned from the manufacturer as a result of running a promotion.

optimization
The process of finding the best formula for achieving a given merchandising objective.

optimization scope
The aspects of a promotion that the optimization was allowed to change, such as a TPR, any products on display, and so on.

overhead
Costs incurred in the operation of a business that cannot be directly related to the individual products or services produced. These costs such as light, heat, supervision and maintenance may be grouped into multiple pools (department, factory, general overhead) and distributed to units of product, or service, by some standard method such as direct labor hours, direct labor cost, and so on.

overhead allocation
The amount of overhead costs attributed to a particular product.

P

package
: A group of products sold for a single price term that is different than if the products were purchased separately.

panel data
: A collection of data about an individual that is the result of monitoring their consumption patterns, the impact of promotions on their consumer behavior, and changes to their consumer behavior.

pantry loading
: The act of stocking up on a product because it is on sale or it is promoted.

pass-through threshold
: The maximum percentage of an allowance that can be passed on to retail customers.

percent funding
: An allowance basis that calculates the allowance amount as a percentage of the promotion's TPR amount.

performance allowance
: A discount for which a retailer qualifies after performing a promotion on behalf of the manufacturer.

performance detail
: A merchandising strategy. This includes product displays, temporary price reduction, or everyday low pricing.

performance detail group
: A combination of performance details that apply to the same product and the same location.

performance period
: A period of time in which a promotion is performing. For example, the amount of time a product will appear on display or be advertised.

planogram
: A visual virtual representation of product layout within a store. A planogram is used to optimize product displays and maximize the effectiveness of product placement.

point-of-sale data (POS data)
: Information that is collected by scanning products at the check-out. The data include the items purchased, the volume of sales, and the purchase price for all items sold.

POS data
: See point-of-sale data.

potential average quantity
: The average of the minimum and maximum quantity values for a package.

PPG
: See promoted product group.

pre-price class
: A group of products that share the same pre-price.

price elasticity
: See price elasticity of demand.

price elasticity of demand
: The rate at which product demand changes due to a change in product price. Elasticity is represented as a change in demand divided by change in price.

price gap
: The difference in price between two related products.

price image
: The consumer perception of a retailer's prices and value.

price lock
: An optimization function that holds the unit price of a line item constant.

price rule
: See business rule.

price zone
: A group of stores that always have the same prices across products.

product cost
: The amount of monies paid to a manufacturer or wholesaler by a retailer in order to carry a specific product.

product cube
: The volume of space occupied by a product, expressed in cubic feet.

product elasticity
: Price elasticity of demand for a particular product.

product pair
: A set of two products that have a promotional constraint established between them.

product relationship
: The established connection between two products.

product share
: The ratio of the revenue of an individual product to the total revenue in one store.

product storage type
: The location in the store that houses a product.

product velocity
: The rate of sales of a product over a defined time period. For example, the number of units of a product that are sold in one month.

profit Revenue minus variable costs, fixed costs, and activity-based costing costs.

promoted product group (PPG)
: A group of products from the same product line that are promoted together.

promotion
: A temporary product price adjustment, consumer benefit, or both, tied directly to the purchase of a product. See also scenario.

promotion validation
: A process that automatically detects errors in a promotion.

R

reference cost
The cost used to determine the triggers in the price update process.

release
A distribution of a new product or new function and authorized program analysis report (APAR) fixes for an existing product. The first version of a product is announced as release 1 modification level 0.

replenishment frequency
The number of times that store or distribution centre inventory is replaced in a given time period.

retail price
The price that a consumer pays for a product.

return on investment (ROI)
The amount of profit or cost saving that is realized for a given expenditure.

revenue
The monies that are received for products or services rendered to customers.

ROI See return on investment.

S

sale impact
A measure of the effect of a sale or promotion on the demand of a product.

sales See revenue.

sales volume
The number of units of products sold in consumer or business-to-business transactions.

same-store comparison
A measure of sales growth across stores excluding the impact of newly opened stores.

scan allowance
A discount offered to the retailer from the manufacturer for a specific product that is sold during a promotion period.

scanner data
See point-of-sale data.

scenario
A set of constraints and rules applied to product, store, price, and cost data that is optimized to achieve a particular business objective in terms of profit, revenue, and volume. See also promotion.

scope The full extent of the aspects of a project.

seasonality
A trend in consumer behavior that is determined by the time of year.

single product rule
A constraint imposed on the optimization of a single product.

size class
A group of products that is determined by their size, volume, and weight.

size class set
A group of size classes that is populated with similar size classes comprised of related product categories.

size family
A subset of a size class. Size families are created in order to exclude some members of the same size class.

size group
See size class.

size rule
A constraint imposed on similar products that are related in volume, weight, and count.

SKU See stock keeping unit.

slotting fee
A fee charged to a manufacturer for introducing a new product onto a retailer's shelf.

spoilage allowance
A discount offered to the retailer to compensate for the spoilage of goods.

static product group
A collection of products with similar or related costs to which new products are manually added or removed.

stock keeping unit (SKU)
An alphanumeric identifier for each item of merchandise, or catalog entry. The smallest unit available for keeping inventory control. It can include variables for department, class, vendor, style, color, size, and location.

stockpiling
See pantry loading.

store-for-store sales
See same-store comparison.

store group
A set of stores that are treated as one unit to achieve a business goal. For example, stores in a given region are treated as a unit.

store traffic
The number of shoppers per unit of time.

store zone
A group of stores that share a set of prices.

strategy
The overall plan of action (such as for a brand unit, business unit, channel, or company) to achieve a stated goal.

substitute product
A product that a consumer would purchase instead of another product with the same or similar utility without the loss of a significant amount of perceived value.

T

temporary price reduction (TPR)
A temporary reduction in the consumer price of a product.

term license
See license.

time cannibalization
See pantry loading.

time horizon
The duration of a product promotion or product scenario.

time series
A set of values of a variable at periodic points in time.

TPR See temporary price reduction.

trade fund
Monies offered to a retailer by a manufacturer for the promotion of a set of products. This fund is usually allocated to pay for promotional activities on the part of the retailer, including ads, displays, and temporary price reductions.

trade spend
See trade fund.

transfer price
See franchise pricing.

trend A series of related measurements that indicates a defined direction or a predictable future result.

two product rule
A constraint imposed on two products.

U

UEF See user-entered forecast.

unit cost
The per unit vendor cost associated with the SKU.

unit sales
See sales volume.

unit volume lift percentage
The percentage of units that will be sold as a result of a promotion.

universal product code (UPC)
A standard bar code, commonly used to mark the price of items in stores, that can be read and interpreted by a computer.

UPC See universal product code.

user-entered forecast (UEF)
A tool that allows the user to override the system-generated forecast.

V

value-added tax (VAT)
A transactional consumption tax charged on most public and private consumption.

variable cost
An operating cost that varies directly with production volume; for example materials consumed, direct labor, sales commissions.

variable trade fund
The sum of performance allowances and forward buy allowances.

VAT See value-added tax.

vendor
A person or company that supplies materials or services to another person or company.

vendor cost change
See manufacturer cost change.

vendor days credit
The number of days extended to the customer before payment is due.

vertical service provider
An industry-focused application service provider.

vignette tax
A fixed-fee tax on a product that does not represent a proportional amount of the product price.

volume
The number of units sold for a particular SKU.

volume difference
The difference between the initial and the optimal volume or predicted number of units sold.

volume of measure
The size of the SKU in absolute terms.

volume percent change
The difference between the initial and the optimal volume or predicted number of units sold in terms of percentage.

volume rule
A constraint imposed on products within a given volume range.

W

warehouse allowance
A discount offered to the retailer on all products shipped to the retailer from the manufacturer.

what if statement
Varying key assumptions to determine how the end results of an analysis differ.

whitelist
A list of approved websites which are ignored by the software to block pop-up ad windows and allowed to function without interference.

workflow status
A category type used for tracking the status of a promotion or category plan.

Z

zone A logical section within an area. A zone can overlap areas but belongs only to the area where it was created. Zones are the units on which rules can be defined and run.

zone group
: A group of stores that share an established price for a given product.

zone price
: An established product price for a group of stores in a given zone.

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