

IBM Master Calendar

Users' Guide

IBM

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Chapter 1. Overview

The IBM® Master Calendar is a merchandising calendar that tracks information about your company's planned activities at various levels of detail. You can compare financial details to determine how well categories, brands, or individual SKUs are expected to perform.

The IBM Master Calendar is a merchandising calendar that tracks information about your company's planned activities at various levels of detail. You can compare financial details to determine how well categories, brands, or individual SKUs are expected to perform. Various reports allow you to review unit volume, revenue, gross profit forecasts, details related to promotion events, and pricing information across multiple categories of merchandise for any selected time period.

Related Topics

“Master Calendar”

“Workflow for Everyday Price Optimization” on page 2

“Workflow for Markdown Optimization” on page 2

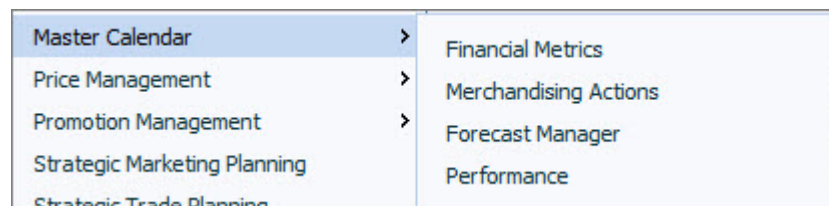
“Workflow for Promotion Planning & Management” on page 3

“Master Calendar Exports” on page 4

Master Calendar

Master Calendar is designed to enable all Omni-Channel Merchandising applications to share information related to base pricing, markdown pricing, and promotional activity in a single view.

Master Calendar is designed to enable all IBM Omni-Channel Merchandising applications to share information related to base pricing, markdown pricing, and promotional activity in a single view. The Master Calendar is available by clicking Master Calendar in the main drop-down menu:



The **Master Calendar** allows you to:

- View promotions that have been placed on the Team and Public Calendars from the IBM Promotion Management service
- **Predict** the outcomes of promotions currently on the Master Calendar in the **Forecast Manager** report
- Use the **Financial Metrics** report to view how promotions on the calendar will likely impact financial results over time, including performance of products relative to financial targets and actual results
- Unified activity planning across IBM Markdown, Promotion, and Price services

- The **Merchandising Actions** report, which shows how base price, markdown price, and promotional price changes influence pricing and financial metrics across your product hierarchy

Today, only Promotion Planning & Management, Markdown Optimization, and Price Optimization and Price Management are integrated with the Master Calendar.

Related Topics

Chapter 1, “Overview,” on page 1

“Master Calendar Exports” on page 4

Translations

IBM Master Calendar is available in multiple national language versions.

The Master Calendar application interface is available in the following national languages:

- Brazilian Portuguese
- Chinese
- French
- German
- Japanese
- Russian
- Spanish

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

Workflow for Everyday Price Optimization

In the Merchandising Actions report, you can view how changes from Price Management and Price Optimization affect your overall prices.

IBM Price Management and Price Optimization is integrated with the Master Calendar. In the Merchandising Actions report, you can view how changes from Price Management and Price Optimization affect your overall prices, as well as combined financial outcomes across IBM Price, Promotion, and Markdown services.

Related Topics

“Workflow for Markdown Optimization”

“Workflow for Promotion Planning & Management” on page 3

Chapter 1, “Overview,” on page 1

Workflow for Markdown Optimization

In the Merchandising Actions report, you can view how changes from Markdown Optimization affect your overall prices.

Markdown Optimization is integrated with the Master Calendar. In the Merchandising Actions report, you can view how changes from Markdown Optimization affect your overall prices, as well as combined financial outcomes across IBM's Price, Promotion, and Markdown services.

Related Topics

"Workflow for Everyday Price Optimization" on page 2

"Workflow for Promotion Planning & Management"

Chapter 1, "Overview," on page 1

Workflow for Promotion Planning & Management

Master Calendar supports a simplified workflow process for committing promotions to production, or editing promotions that have been committed.

Master Calendar supports a simplified workflow process for committing promotions to production, or editing promotions that have been committed. Using Master Calendar, you can commit a promotion directly to the planning and production calendars, bypassing category plans completely.

If your company only uses IBM Omni-Channel Merchandising to support promotion execution, and does not take advantage of the forecasting functionality, the workflow process below applies to you:



If your company uses the IBM Omni-Channel Merchandising forecasting capability, Master Calendar activities will follow the workflow process below:



You can choose to commit both promotions and category plans to the Master Calendar.

Note: To place category plans on the team and public calendars, you must have the correct permissions set up for your user profile. For more information, contact an administrator at your company or your IBM representative.

Related Topics

"Workflow for Everyday Price Optimization" on page 2

Master Calendar Exports

Master Calendar typically contains promotions that have been approved for execution to stores. Once promotions are placed on the Master Calendar, they are visible to management and can be manually or automatically exported to downstream systems for execution.

Master Calendar typically contains promotions that have been approved for execution to stores. Once promotions are placed on the Master Calendar, they are visible to management and can be manually or automatically exported to downstream systems for execution. You can also use the Master Calendar to forecast portions of your product hierarchy by category.

Note: When predicting the Master Calendar, predictions are made at the category level. No cross-category effects are forecasted.

Access to the Public Calendar is controlled by role-based permissions.

Related Topics

“Master Calendar Exports”

Chapter 2. Placing Data On Calendars

Activities in Promotion Planning & Management, Price Management, and Price Optimization can be placed on the Team and Public calendars.

Today, only activities in Promotion Planning & Management, Price Management, and Price Optimization can be placed on the Team and Public calendars.

Related Topics

“Using Master Calendar with Promotions”

“Placing Promotions on the Calendars”

“Removing Promotions from the Calendars” on page 7

Using Master Calendar with Promotions

Master Calendar is integrated with Promotion Planning & Management.

Master Calendar is integrated with Promotion Planning & Management and Price Management and Price Optimization.

Related Topics

“Placing Promotions on the Calendars”

“Replacing Promotions on the Public Calendar” on page 7

“Removing Promotions from the Calendars” on page 7

Placing Promotions on the Calendars

You can add a promotion to the Master Calendar from anywhere inside Promotion Planning & Management that you can view the promotion.

About this task

You can add a promotion to the Master Calendar from anywhere inside Promotion Planning & Management that you can view the promotion. Currently, promotions cannot be added from inside the Master Calendar application.

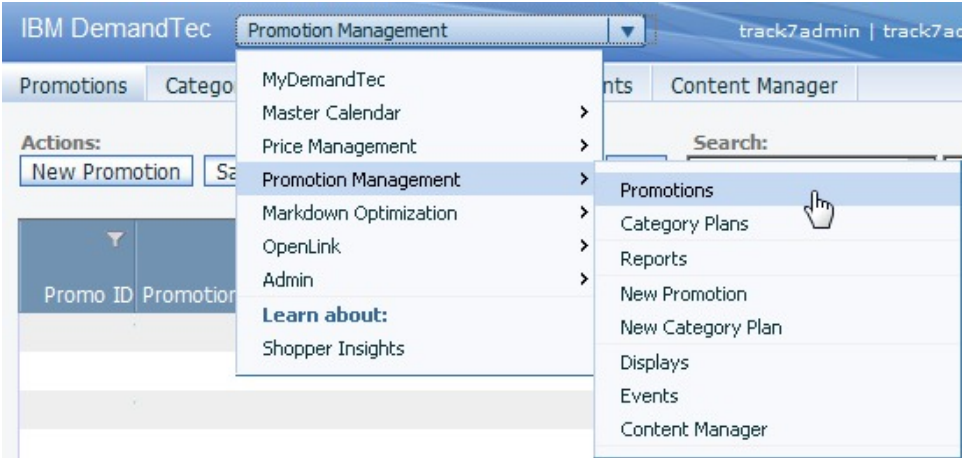
Once a promotion has been placed on the calendar, any changes to the promotion made inside Promotion Planning & Management will be reflected in the calendar. For example, if you remove three products from a display in Promotion #126, those products will not be on the display if you view the promotion from the Master Calendar. Once a promotion has been placed on the Master Calendar, it is locked and cannot be edited.

Note: Users with the appropriate permissions may also modify the lock status for a promotion. If a promotion is changed to **Locked**, it cannot be modified unless the status is changed back to **Unlocked**. You may only modify the lock status of a promotion if you initially created the promotion, or if you have the **Lock/Unlock Promotions** permission.

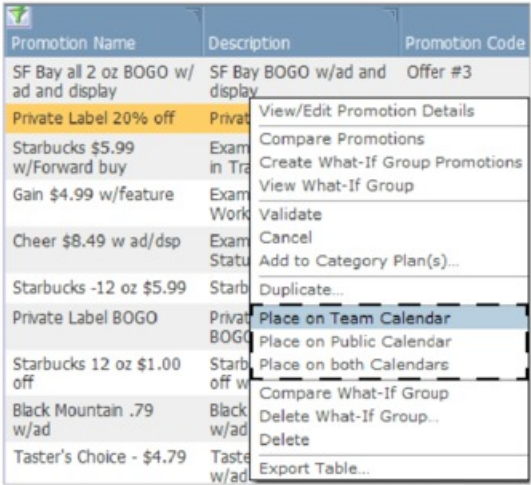
To place a promotion on the Public or Team Calendar from the **Promotion Manager** page:

Procedure

- 1. Navigate to **Promotion > Promotions** to view the **Promotion Manager** page.



- 2. In the **Promotions** page, right-click a promotion and select **Place on Team Calendar**, **Place on Public Calendar**, or **Place on both Calendars**.



- 3. The promotion has been added to the calendar(s) you selected. The **Workflow Status** field will reflect the calendar(s) containing the promotion.

Promotion Name	Calculation Status	Workflow Status
Starbucks \$5.99 w/Forward buy	Uncalculated	Draft
Gain \$4.99 w/feature	Predicting...	On Team Calendar
Cheer \$8.49 w ad/dsp	Uncalculated	On Public Calendar
Starbucks -12 oz \$5.99	Predicted	On Team and Public Calendars
Tropicana OJ 96 oz \$3.29 TPR Price Point-	Predicted	On Team Calendar

Replacing Promotions on the Public Calendar

If a promotion from the promotion group has been added to the Public Calendar, it can be replaced by another promotion in the group, even if the performance details have changed.

If a promotion from the promotion group has been added to the Public Calendar, it can be replaced by another promotion in the group, even if the performance details have changed. The only situation in which a Public Calendar promotion cannot be replaced is if one or more performance details has changed, one or more performance details is linked to a locked event, and you do not have the correct permissions to edit a locked event.

Addition or deletion of a performance detail, as well as changes to any of the following, is considered a change to the performance detail:

- Performance detail type or sub-type
- Pricing terms at the location group or individual location level
- Start or end date of a performance detail
- Other attributes, e.g., **Headline Copy**, **Shelf ID**, etc.
- Selected location group class of a performance detail
- Historical store participation rate (ACV%) of a performance detail
- Redemption rate of a performance detail
- Products selected for promotion

Removing Promotions from the Calendars

You can remove a promotion from the Team Calendar or Public Calendar from inside Master Calendar, or from inside Promotion Planning & Management.

About this task

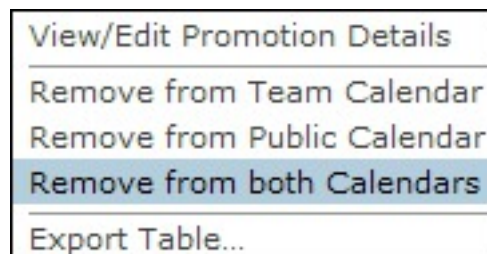
Promotions can easily be removed from the Team Calendar or Public Calendar. You can remove a promotion from inside Master Calendar, or from inside Promotion Planning & Management.

Note: If the promotion is linked to a locked event, you may need to contact a power user with the correct permissions to edit the event before you can remove the promotion. A user with these permissions can unlock the event to allow you to unlink the promotion, or unlink the promotion herself/himself.

To remove a promotion:

Procedure

1. In the **Team Calendar** or **Public Calendar** page, right-click a promotion to display the context menu.



2. Select **Remove from Team Calendar**, **Remove from Public Calendar**, or **Remove from both Calendars**.
3. The promotion is removed from the calendar(s) you selected, but is not deleted from Promotion Planning & Management. The promotion's workflow status is reverted to **Draft** if it has been removed from both calendars.

Related Topics

"Placing Promotions on the Calendars" on page 5

Editing Promotions on the Public Calendar

To edit a promotion, you can remove it from the Public Calendar, make changes, and add it back to the Public Calendar.

About this task

Once a promotion has been placed on the Public Calendar, it is considered finalized and locked. To edit a promotion, you can remove it from the Public Calendar, make changes, and add it back to the Public Calendar. You can also duplicate the promotion, make edits to the copy, and replace the existing promotion with the copied promotion.

The only situation in which a Public Calendar promotion cannot be replaced is if one or more performance details has changed, one or more performance details is linked to a locked event, and you do not have the correct permissions to edit a locked event.

Addition or deletion of a performance detail, as well as changes to any of the following, is considered a change to the performance detail:

- Performance detail type or sub-type
- Dominant pricing terms
- Pricing terms at the location group or individual location level
- Start or end date of a performance detail
- Other attributes, e.g., **Headline Copy**, **Shelf ID**, etc.
- Selected location group class of a performance detail
- Historical store participation rate (ACV%) of a performance detail
- Redemption rate of a performance detail

To edit a promotion by duplicating:

Procedure

1. From the Public Calendar, right-click on the promotion and select **View/Edit Promotion Details** from the context menu.

ID	Merchandising Action	Name	De
2434	Promotion	<div>View/Edit Promotion Details</div> <div>Remove from Team Calendar</div> <div>Remove from Public Calendar</div> <div>Remove from both Calendars</div> <div>Export Table...</div>	
2448	Promotion		
2453	Promotion		

- Click **Edit** in the **General** area of the **Promotion Details** page.

Public Calendar > **Promotion Details**

Purex 128 oz Promo ID: 2692

General

Name: Purex 128 oz

Description:

Code:

Divisions: Chain

Ad Zones: National Ad Zone

Edit **More** ▼

- A **New Version Warning** dialog box will appear . Click **OK** to create an editable copy of the promotion.

New Version Warning

The Promotion you are trying to edit is on the Public Calendar and is therefore locked.

Select OK to create an editable version.

OK **Cancel**

- In the copied promotion, make the necessary modifications to the performance details and/or allowances.
- From the **Select an Action** drop-down menu, select **View/Edit Promotion Group Details**. The **Promotion Group Details** page open, and all promotions in the group will be available from the left navigation pane.
- Right-click on the new, edited version of your promotion and select **Place on Public Calendar** or **Place on both Calendars**. Because the copied promotion belongs to the same promotion group as the original promotion, the original promotion will be replaced on the Public and/or Team calendars by the copy.

Chapter 3. Using the Master Calendar

Once promotions are placed on the calendar, they are visible to management and can be manually or automatically exported for use in downstream execution systems. The Master Calendar can be predicted to view up-to-date forecast results at the category level.

The three flexible reports in IBM Master Calendar provide a public production view for all plans that have been approved for execution to stores. Once promotions are placed on the calendar, they are visible to management and can be manually or automatically exported out of IBM Omni-Channel Merchandising for use in downstream execution systems. The Master Calendar can be predicted to view up-to-date forecast results at the category level.

Related Topics

“Viewing Activities on the Calendar”

“Predicting the Master Calendar” on page 13

Viewing Activities on the Calendar

use this procedure to view an overview of actions placed on the Master Calendar in the Merchandising Actions report. The Merchandising Actions report displays all planned merchandising activities (promotions, markdown price changes, and base price changes) for the date range and product hierarchy portions selected.

About this task

The Master Calendar displays a centralized view of all promotions, price changes, and markdown price changes planned by your merchandising team and committed for execution in IBM Omni-Channel Merchandising, or in other applications integrated with IBM Master Calendar.

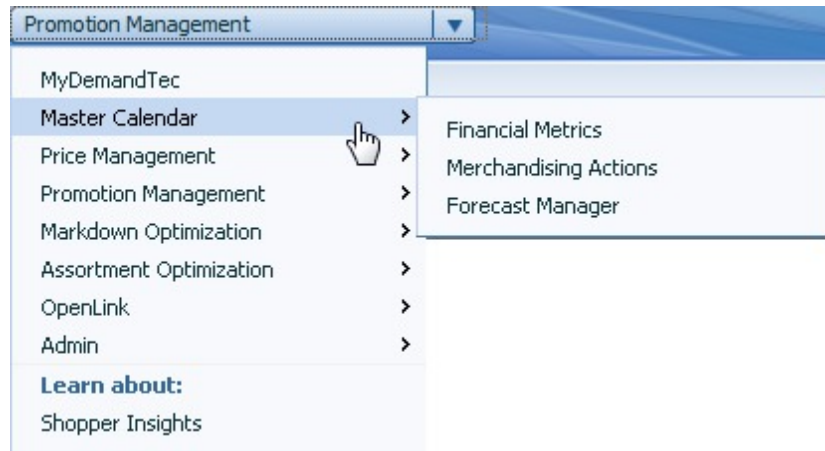
When predicted, it shows the forecasted financial impact on individual categories of running all planned promotions. Though all Master Calendar forecasts are at the single-category level, the Public Calendar also aggregates results to display cross-category summaries.

From the Master Calendar, three reports are available: **Merchandising Actions**, **Financial Metrics**, and **Forecast Manager**. The **Merchandising Actions** report displays all planned merchandising activities (promotions, markdown price changes, and base price changes) for the date range and product hierarchy portions selected. The **Financial Metrics** report provides forecasted results, including baseline forecasts and anticipated lifts from planned promotional activity, as well as financial performance versus targets, saved forecasts, and actuals.

To view an overview of actions placed on the Master Calendar in the Merchandising Actions report:

Procedure

1. Select **Master Calendar > Merchandising Actions** from the main drop-down menu:



2. Use the product selection, date range selection, and location selection tools on the left-hand side of the report to narrow down your analysis and see all activities on the calendar for that period:

Report Parameters

▼ Date

Date Range: Week | Month | Quarter

Next 4 weeks ▼

▼ Products

Select Using: Product Hierarchy | Query | Preview...

+ Add Criteria × Remove × Clear

Field	Operator	Value
Name ▼	Contains ▼	Bacon

Generate Report

3. Click **Generate Report**

Note: You will only have access to the Master Calendar if you have the correct permissions. For more information, please contact your system administrator or your IBM representative.

For more information about the Merchandising Actions report, see “Merchandising Actions Report” on page 21.

Related Topics

“Merchandising Actions Report” on page 21

Predicting the Master Calendar

You can manually predict the Public Calendar if you have the Enable Master Calendar Predictions permission.

About this task

You can manually predict the Public Calendar if you have the **Enable Master Calendar Predictions** permission. The return times for a manual prediction can vary depending on the number of products, stores, and weeks included in the prediction. IBM recommends that you limit the report view to only those items that need to be re-forecasted before beginning a manual prediction.

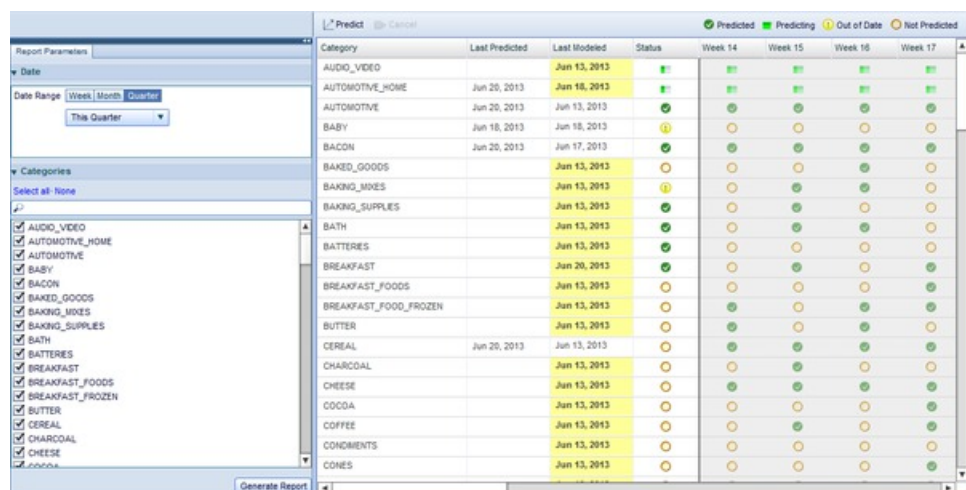
From the Master Calendar, a prediction forecasts the results as if all promotions included in the calendar were executed. After prediction, the **Financial Metrics** report summarizes forecasts for unit volume, revenue, targets, actual results, user-entered forecasts, and comparisons between those metrics. The **Merchandising Actions** report can also display gross margin, volume, and revenue results for promoted products, non-promoted products, and total results. Incremental results and percent change from baseline values are also shown.

Forecasts are created by category-week and do not cross over modeling categories. Each forecast is summed to create the grand totals for review.

To run a manual prediction:

Procedure

1. Select **Master Calendar > Forecast Manager** from the main application drop-down menu.
2. Click on the category you wish to forecast and click **Predict**. Each week shown in the Forecast Manager for that category will show an animated progress bar, indicating that prediction is in progress.



The screenshot displays the Forecast Manager interface. On the left, there are 'Report Parameters' including 'Date' (set to 'This Quarter') and 'Categories' (a list of product categories with checkboxes). The main table shows the following data:

Category	Last Predicted	Last Modeled	Status	Week 14	Week 15	Week 16	Week 17
AUDIO_VIDEO		Jun 13, 2013	Predicted	Predicted	Predicted	Predicted	Predicted
AUTOMOTIVE_HOME	Jun 20, 2013	Jun 16, 2013	Predicted	Predicted	Predicted	Predicted	Predicted
AUTOMOTIVE	Jun 20, 2013	Jun 13, 2013	Predicted	Predicted	Predicted	Predicted	Predicted
BABY	Jun 18, 2013	Jun 18, 2013	Predicting	Predicting	Predicting	Predicting	Predicting
BACON	Jun 20, 2013	Jun 17, 2013	Predicted	Predicted	Predicted	Predicted	Predicted
BAKED_GOODS		Jun 13, 2013	Predicted	Predicted	Predicted	Predicted	Predicted
BAKING_MIXES		Jun 13, 2013	Predicted	Predicted	Predicted	Predicted	Predicted
BAKING_SUPPLIES		Jun 13, 2013	Predicted	Predicted	Predicted	Predicted	Predicted
BATH		Jun 13, 2013	Predicted	Predicted	Predicted	Predicted	Predicted
BATTERIES		Jun 13, 2013	Predicted	Predicted	Predicted	Predicted	Predicted
BREAKFAST		Jun 20, 2013	Predicted	Predicted	Predicted	Predicted	Predicted
BREAKFAST_FOODS		Jun 13, 2013	Predicted	Predicted	Predicted	Predicted	Predicted
BREAKFAST_FOOD_FROZEN		Jun 13, 2013	Predicted	Predicted	Predicted	Predicted	Predicted
BUTTER		Jun 13, 2013	Predicted	Predicted	Predicted	Predicted	Predicted
CEREAL	Jun 20, 2013	Jun 13, 2013	Predicted	Predicted	Predicted	Predicted	Predicted
CHARCOAL		Jun 13, 2013	Predicted	Predicted	Predicted	Predicted	Predicted
CHEESE		Jun 13, 2013	Predicted	Predicted	Predicted	Predicted	Predicted
COCOA		Jun 13, 2013	Predicted	Predicted	Predicted	Predicted	Predicted
COFFEE		Jun 13, 2013	Predicted	Predicted	Predicted	Predicted	Predicted
CONDIMENTS		Jun 13, 2013	Predicted	Predicted	Predicted	Predicted	Predicted
CONES		Jun 13, 2013	Predicted	Predicted	Predicted	Predicted	Predicted

3. When the prediction is complete, the category's week columns will show as a green check-box.

For more information about the Forecast Manager, see “Forecast Manager Report” on page 24

The Master Calendar provides additional functionality beyond the existing Master Calendar using an interactive Flash-based User Interface. Customers who use the Master Calendar add-on will be able to use flexible reports to view and manage financial data, planning information, and more. The Master Calendar will also include additional integration with existing IBM Omni-Channel Merchandising services, allowing you to manage all of your pricing, promotion, and markdown activities in one place.

Related Topics

“Predicting the Master Calendar” on page 13

“Financial Metrics Report”

Master Calendar Reports

The reports within the application help you forecast and analyze financial results across all merchandising activities, including promotion, pricing, and markdown actions.

The reports described below help you forecast and analyze financial results across all merchandising activities within IBM Omni-Channel Merchandising services, including promotion, pricing, and markdown actions. The Master Calendar can also be integrated with third-party data sources, providing a centralized view for planning and analysis. For more information about each report, please see:

- “Financial Metrics Report”
- “Merchandising Actions Report” on page 21
- “Forecast Manager Report” on page 24
- “Performance Report” on page 25

Note: Integrating with third-party data sources requires additional configuration with Master Calendar. For more information, please contact your IBM representative.

Related Topics

“Financial Metrics Report”

“Merchandising Actions Report” on page 21

“Forecast Manager Report” on page 24

Financial Metrics Report

The Financial Metrics Report enables you to view financial performance by product hierarchy or category.

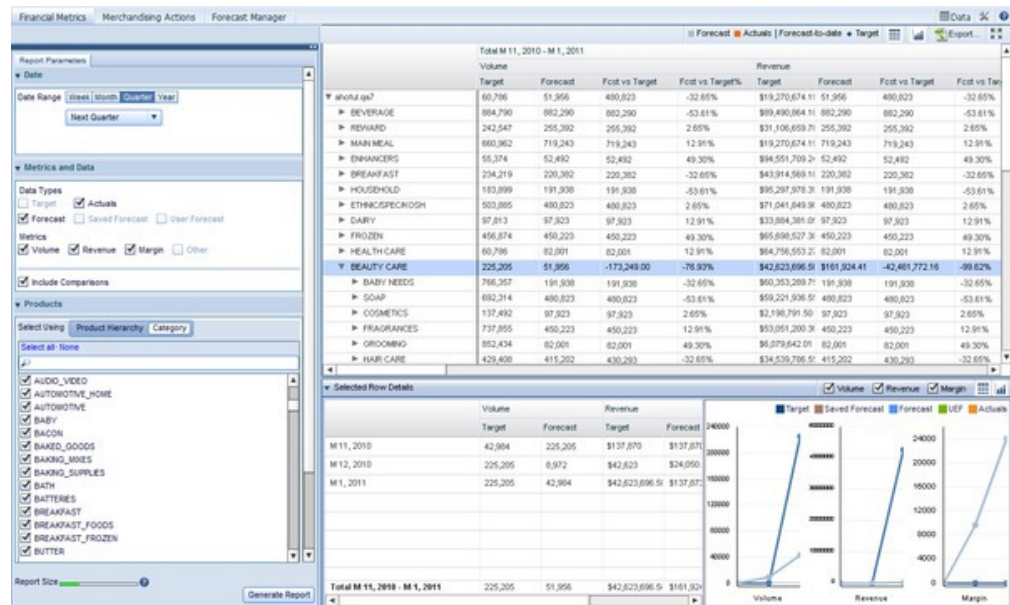
The **Financial Metrics Report** enables you to view financial performance by product hierarchy or category, including:

- Revenue, volume, and margin forecasts for each portion of your product hierarchy
- Current[®] inventory units

- Actuals information about real sales, allowing you to monitor actual results versus forecasts and targets, including user-entered forecasts and saved forecasts. You can view Actuals information as far back as a year
- Imported targets for revenue, volume, and margin
- Comparison of targets and IBM Omni-Channel Merchandising forecasts, using both interactive graphs and data aggregated down to the UPC level
- Available custom metrics, as defined by your company

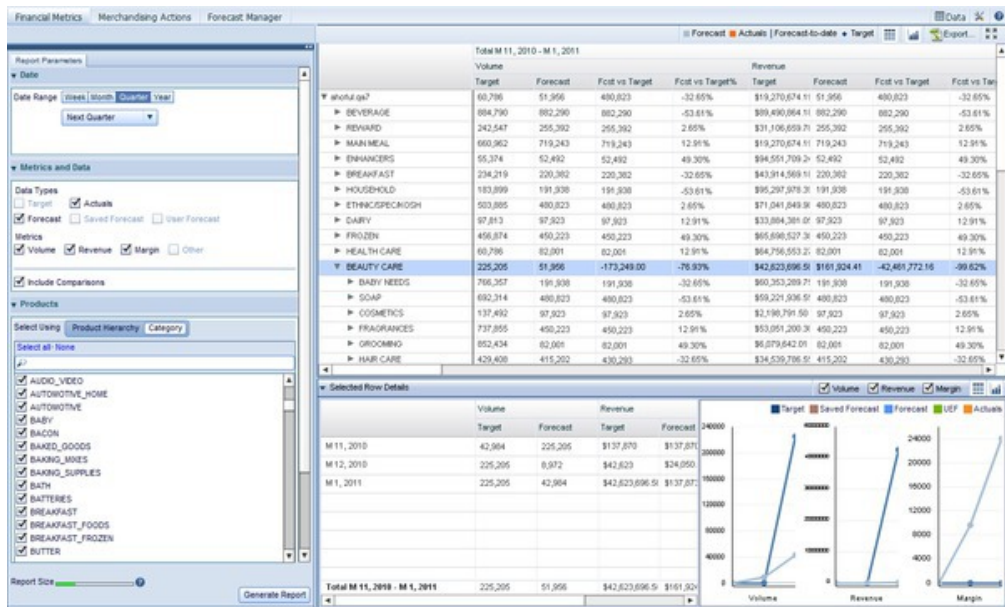
Note: You will only be able to see portions of the product hierarchy to which you have access. For additional access, please contact your system administrator.

To generate the report, navigate to **Master Calendar > Financial Metrics** and enter the report parameters on the left side of the screen to load the report:



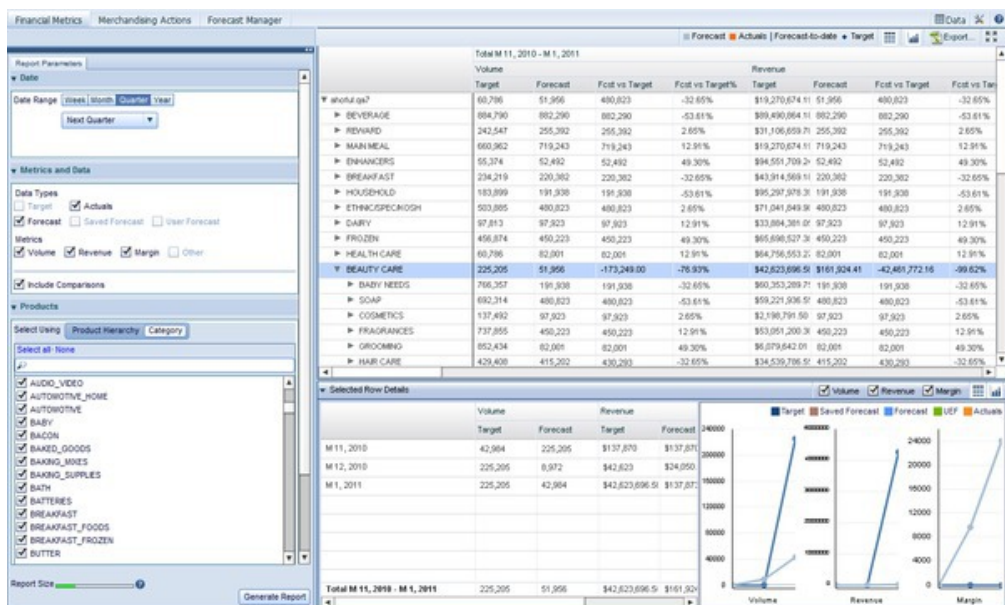
Note: Depending on permissions defined for your user, you may only see a portion of your company's product hierarchy in the calendar view. To obtain additional permissions for other parts of the product hierarchy, please contact your administrator.

The parameters on the left-hand side of the screen will control which data are displayed in the report on the right. Each Financial Metrics report is generated for a specific time period, aggregated by weeks, months, quarters, or years. To choose the aggregation type and time period to analyze, use the **Date** section of the **Report Parameters** pane:



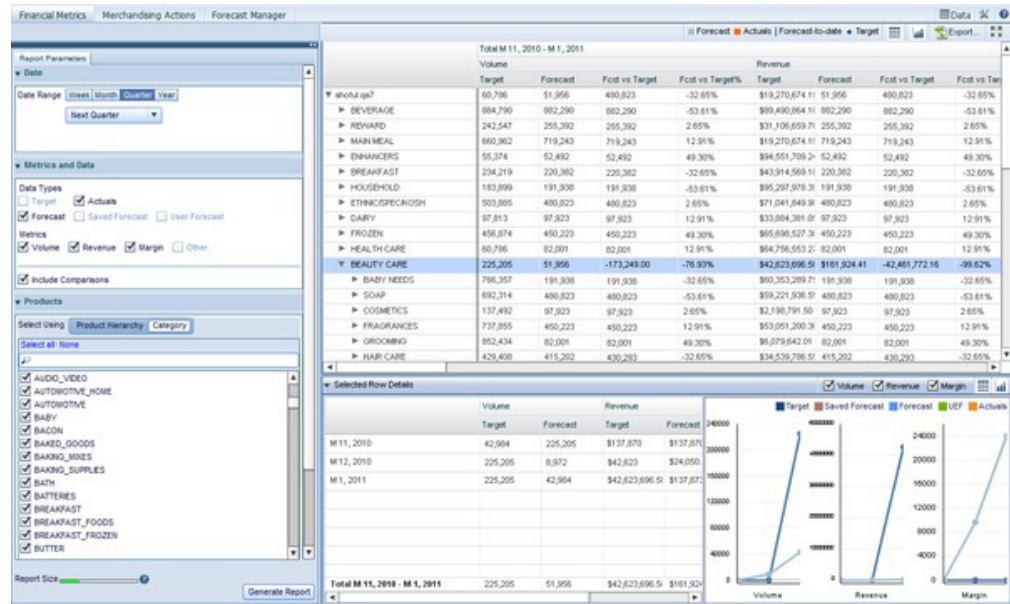
You can select from the drop-downs for each aggregation type, or select **Custom** to specify a date range.

Note: Selecting longer time periods will increase your report size and slow your report generation time. You can monitor the time it will take to generate your report using the colored bar at the bottom left corner of the screen. Green bars will generate quickly, while yellow bars generate slowly, and red bars should be re-designed to encompass less data.



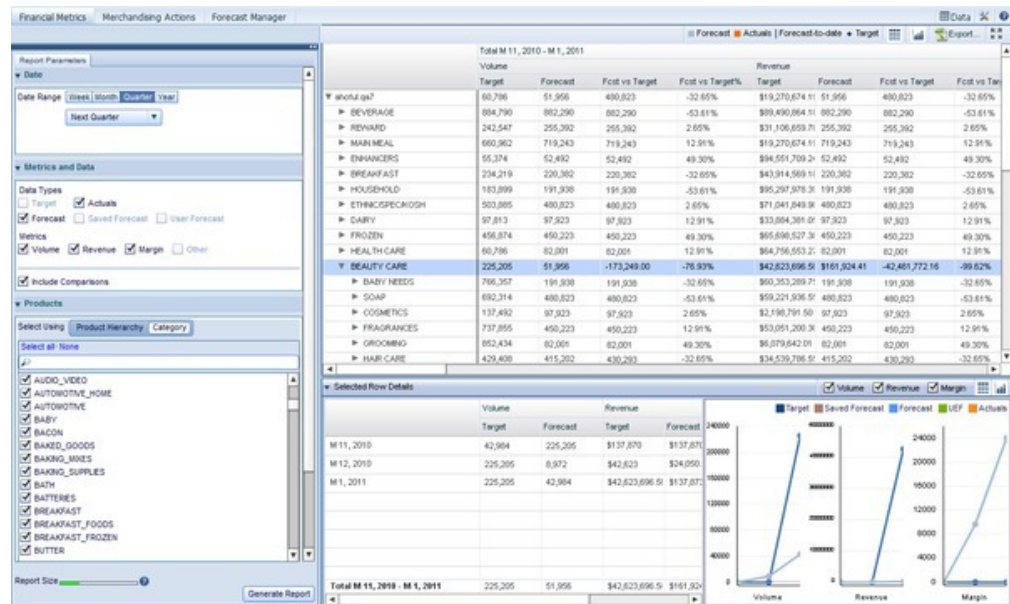
Once you have selected a date range, you can select the metrics and data types to view. If other users have saved forecasts, choosing the **Saved Forecast** check-box will allow you to see those forecasts. You can also see User-Entered Forecast information by selecting the **UEF** check-box. The report will show data for all selected metrics and data types. If your company has enabled user-configured metrics, they are shown in the **Available** list. Click the right arrow to move a

configurable metric to the **Selected** list. Keep in mind that increasing the amount of data shown in the report will slow its generation.



Note: To see the **Saved Forecast** or **User Forecast** check-boxes, you must have appropriate permissions from your system administrator.

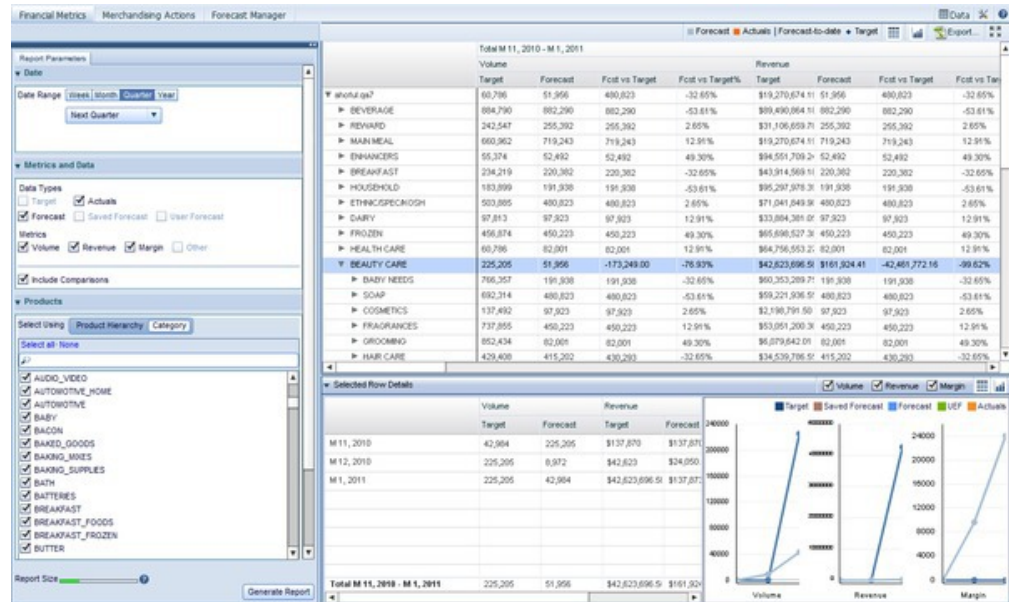
Next, you can select whether you want to view products using an expandable product hierarchy or IBM Omni-Channel Merchandising categories:



If you use the Product Hierarchy, you will be able to drill down through product hierarchy levels to view financial results across products and portions of your product hierarchy. Selecting one or more IBM Omni-Channel Merchandising categories will aggregate financial results for all products in that category.

You can also limit the scope of the report by location hierarchy. Using the **Locations** box, select the locations you would like to include in your analysis.

Restricting data to portions of your location hierarchy enables you to focus your analysis on particular locations or zones.



Once you have selected the time period, data types, metrics, and locations you wish to analyze, click **Generate Report**. This will bring back a table of the data requested, aggregated by the type of time period selected. For example, if you selected **Last 4 Weeks** in the **Date** pane and all metrics in the **Metrics and Data** pane, you would see four sections, one for each of the last 4 weeks, subdivided by the chosen metrics for each week.

If you select the **Include Comparisons** check-box, you can also measure metric performance versus other metrics displayed in the report. For example, the **Fcst vs Target** metric will show you the dollar difference between the **Target** and **Forecast** metrics for the time period shown, while **Fcst vs Target %** will show you the percentage difference between Forecasts and Targets.

Clicking on a row in the product hierarchy will display the **Selected Row Details** pane, which shows specific data and graphs for the product hierarchy level you clicked on. Multi-selecting rows will show a summation of the selected levels. As shown in the example below, the report shows one graph for each of the metrics you selected, showing changes over time for each of the metrics in the selected portion of the product hierarchy you clicked on.

Related Topics

“Predicting the Master Calendar” on page 13

Viewing Additional Graphs

The Financial Metrics report includes functionality to view mini-graphs for each portion of the product hierarchy to which you have access. Use this procedure to view these additional graphs.

The Financial Metrics report includes functionality to view mini-graphs for each portion of the product hierarchy to which you have access. These graphs allow you to quickly evaluate:

- Current financial performance of the product hierarchy node relative to targets
- Financial performance of nodes relative to IBM Omni-Channel Merchandising forecasts
- To-Date tracking toward targets, allowing you to see approximately expected levels of sales given the IBM Omni-Channel Merchandising forecast

To view these additional graphs, click the

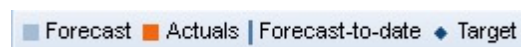


button in the upper right corner of the report. This will enable the additional graphs:



Note: You must have selected **Targets**, **Actuals**, or both from the **Metrics and Data** area when generating the report to see the additional graphs button.

Each graph can be interpreted using the legend above the interface:



Thus, in the set of graphs above, the upper-left graph, charting Volume performance in the ANALGESICS category, provides the following at-a-glance analyses:

- The target for the category is slightly greater than the IBM Omni-Channel Merchandising Forecast for the category
- The actuals performance to date (orange line) is not meeting predicted forecast performance (the dark blue vertical line) to date. This might indicate that there is an issue with the category.

To hide the additional graphs, click the grid button next to the graphs button.

Saving Forecasts

If you have appropriate permissions, you will be able to save forecasts in the Saved Forecast columns of the Financial Metrics report.

About this task

If you have appropriate permissions, you will be able to save forecasts in the Saved Forecast columns of the Financial Metrics report. If you save the forecast values, other users will be able to see your saved information at a later date and compare it to current forecasts or UEF information.



To save a forecast:

Procedure

1. Select one or more nodes that have forecast information in the data grid.
2. To multi-select, hold the Shift key to select a range while clicking on nodes, or the Ctrl key to select several individual nodes.
3. Once all of the nodes for which you would like to save your forecasts are selected, click **Save Forecast**.
4. You will see the information from the **Forecast** column replicated into the **Saved Forecast** column.

Setting User-Entered Forecasts

If you have appropriate permissions, you are able to set User-Entered Forecasts (UEFs) for portions of the product hierarchy in the Financial Metrics report.

If you have appropriate permissions, you are able to set User-Entered Forecasts (UEFs) for portions of the product hierarchy in the Financial Metrics report. When generating the report, ensure that you have selected the **UEF** check-box in the **Metrics and Data** area.

After the report has generated, you will be able to select individual rows in the data grid and open the **Selected Row Details** pane at the bottom of your screen:

▼ Selected Row Details				
	Volume			
	Target	Saved Forec...	Forecast	UEF
W 35, 2012				132,500
W 36, 2012				125,000
W 37, 2012		32,637	32,637	160,000
W 38, 2012				142,322

To enter UEF information, place your mouse cursor in a cell belonging to the UEF column and click. Enter your information and click **Save UEF** at the top of the screen to apply your entries.

Note: You will only be able to enter UEF details if you have appropriate permissions, have selected exactly one row in the top grid, and have only selected one Division or Location from the **Location** area when generating the report.

Exporting Data

Use this procedure to export data from the Financial Metrics report to a Microsoft Excel spreadsheet, or a Comma-Separated Values (CSV) file.

You can export data from the Financial Metrics report to Microsoft Excel 97-2003, Excel 2007, or a Comma-Separated Values (CSV) file. After you have generated your report, expand the nodes you would like to export. Then, click the



button.

Export Table ✕

File Type:

☒ Excel 97-2003
 ☐ Excel 2007
 ☐ CSV

Cancel
Export

Merchandising Actions Report

The Merchandising Actions report provides a single tool to view and analyze all of your pricing decisions at all levels of your product hierarchy.

The **Merchandising Actions** report provides a single tool to view and analyze all of your pricing decisions at all levels of your product hierarchy. The Merchandising Action view conglomerates activity across IBM Omni-Channel Merchandising Price Optimization, Markdown Optimization, and Promotion Optimization products. This analysis can be restricted to custom time periods, specific divisions, and more:

Name	Type	Base Price 07/09/2012	Base Price 06/10/2012	W 5	W 20	W 21
5678_Root_Cut						
0052177101310 LEVIS		\$37.99	\$39.99	\$29.99	\$42.99	\$29.99
wk1 big promo				\$29.99		
Price Change					\$42.99	
wk5 promotion						\$29.99
wk5 promo						
Markdown						
0052177078186 LEVIS		\$37.99	\$39.99	\$29.99		\$29.99
0052177154105 LEVIS		\$37.99	\$39.99	\$29.99		\$29.99
0052177154161 LEVIS		\$37.99	\$39.99	\$21.49	\$21.49	\$21.49
Markdown				\$21.49	\$21.49	\$21.49
2344_Loose Fit						

Multiple Items Selected	Description	Metrics			
		Volume	Revenue	Gross Margin \$	Gross Margin %
▶ Promoted		0	\$0	\$0	0.00%
▶ Non-Promoted		141,164	\$1,158,288	\$498,946	43.00%
▶ Baseline		141,164	\$1,158,288	\$498,946	43.00%
▶ Incremental		0	\$0	\$0	0.00%
▶ Total		141,164	\$1,158,288	\$498,946	43.00%
▶ % Change vs. Baseline		0.00%	0.00%	0.00%	0.00%

To generate a Merchandising Actions report, select **Merchandising Actions** in the left panel.

The screenshot shows the 'Report Parameters' dialog box. It has two main sections: 'Date' and 'Products'. The 'Date' section has 'Date Range' with buttons for 'Week', 'Month', and 'Quarter'. Below it is a 'Next 4 weeks' button with a dropdown arrow. The 'Products' section has 'Select Using' with buttons for 'Product Hierarchy' and 'Query', and a 'Preview...' button. Below these are buttons for '+ Add Criteria', 'x Remove', and 'x Clear'. A table with three columns: 'Field', 'Operator', and 'Value' is shown. The first row has 'Name' in the Field column, 'Contains' in the Operator column, and 'Bacon' in the Value column. At the bottom right is a 'Generate Report' button.

Field	Operator	Value
Name	Contains	Bacon

Then, in the Report Parameters tab, choose the date range you want to analyze. You can view by weeks, months, or quarters. In the **Products** tab, select either **Product Hierarchy** or **Query**. If you select Product Hierarchy, browse through the hierarchy tree to find the product or products you would like to analyze. Selecting a portion of the tree will allow you to analyze all of the products in that part of the hierarchy.

If you would prefer to add products by searching, you can use the **Query** option. This will help you select products that match the query you construct. In the **Field** column, select the product attribute you would like to query. Then, select one of the available operators, allowing you to search for exact matches, partial matches, or exclusion matches. Finally, enter a search string in the **Value** column.

To see an example set of products returned by your query, click **Preview...** If you would like to specify a division to analyze, expand and select it in the **Locations** tab. Finally, click **Generate Report** to retrieve the data and show the final analysis on the right-hand side of the report.

Analyzing Results

After generating the Merchandising Actions report, you will be able to see all of the base price and promotional price changes for the selected products, allowing you to see how your decisions affected volume, revenue, and margin metrics.

After generating the report, you will be able to see all of the base price and promotional price changes for the selected products, allowing you to see how your decisions affected volume, revenue, and margin metrics.

Result: Report Date Range 06/10/2012 - 07/07/2012 ☒ Price Change ☒ Promotion ☒ Markdown

Name	Type	Base Price 07/09/2012	Base Price 06/10/2012	Q 2	M 5	W 20	W 21
▼ 5678_Boot_Cut							
▼ 0052177101318 LEVIS		\$37.99	\$39.99	\$29.99		\$42.99	\$29.99
wk1 big promo				\$29.99			
Price Change						\$42.99	
wk5 promotion							\$29.99
wk8 promo							
Markdown							
▶ 0052177076166 LEVIS		\$37.99	\$39.99	\$29.99		\$29.99	
▶ 0052177154185 LEVIS		\$37.99	\$39.99	\$29.99		\$29.99	
▼ 0052177154161 LEVIS		\$37.99	\$39.99	\$21.49	\$21.49	\$21.49	
Markdown				\$21.49	\$21.49	\$21.49	
▶ 2344_Loose Fit							

Multiple Items Selected	Description	Metrics			
		Volume	Revenue	Gross Margin \$	Gross Margin %
▶ Promoted		0	\$0	\$0	0.00%
▶ Non-Promoted		141,164	\$1,158,268	\$498,946	43.08%
▶ Baseline		141,164	\$1,158,268	\$498,946	43.08%
▶ Incremental		0	\$0	\$0	0.00%
▶ Total		141,164	\$1,158,268	\$498,946	43.08%
▶ % Change vs. Baseline		0.00%	0.00%	0.00%	0.00%

In the top right area, you can see the price history of the selected items, showing various pricing, markdown, and promotional pricing actions that took place over the specified analysis period. In the calendar portion of the view, you can see the prices and pricing effects of various choices on a week-by-week, month-by-month, and quarter-by-quarter basis.

Note: If your company imports actions from external third-party systems into the Master Calendar using OpenLink, you will also be able to see those activities in the right-hand pane.

After you select a product or product hierarchy portion, you will also see financial metrics on the lower right side of the screen in the **Financial Summary** area. This shows how much volume, revenue, and gross margin was affected by your actions on an absolute and percentage basis.

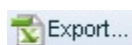
If you have selected an individual item, as opposed to a portion of the product hierarchy, you will be able to access the **Pricing Summary** pane. The Pricing Summary pane shows a list of each of the price changes, as well as the time period for which the changes were effective. The grid also includes details of the IBM Omni-Channel Merchandising plans, including ID and Source ID.

▼ 1234_DENIM		Pricing Summary Financial Summary Relationships...						
SKU 951	Description LEVI JEANS 56	Descr	Price	ID	Source ID	Location	Start Date	End Date
UPC 005		▶ wk1 big promo	\$ 29.99	34412	34222		04/29/2012	5/12/2012
Size 36/32		Price Change	\$ 42.99	3422			5/13/2012	
UOM IN		▶ wk5 promotion	\$ 29.99	22345	22341		5/27/2012	6/02/2012
Manufacturer Levis		▼ wk8 promo	\$29.99	42541	23412		6/17/2012	6/23/2012
Brand		TPR	10% off			LGC (5)	6/17/2012	6/23/2012
Cost \$ 21.99		TPR	\$29.99			LGC (20)	6/17/2012	6/23/2012
Average Margin 23 %								

Exporting Data

Use this procedure to export data from the Merchandising Actions report to a Microsoft Excel spreadsheet, or a Comma-Separated Values (CSV) file.

You can export data from the Merchandising Actions report to Microsoft Excel 97-2003, Excel 2007, or a Comma-Separated Values (CSV) file. After you have generated your report, expand the nodes you would like to export. Then, click the



button.

Export Table

File Type:

☒ Excel 97-2003
 ☐ Excel 2007
 ☐ CSV

Cancel

Export

Forecast Manager Report

The Forecast Manager report allows you to run manual predictions on each category over a selected period of time, and to view existing forecast status, as well as forecast history for each category.

About this task

The Forecast Manager report allows you to run manual predictions on each category over a selected period of time, and to view existing forecast status, as well as forecast history for each category. To use the Forecast Manager:

Procedure

1. Navigate to **Master Calendar > Forecast Manager** from the main drop-down menu.
2. In the left-hand pane, select the categories and date range to analyze.
3. Click **Generate Report**. The report will show the selected categories and weeks, as well as prediction statuses:

Category	Last Predicted	Last Modeled	Status	Week 14	Week 15	Week 16	Week 17
AUDIO_VIDEO	Jun 13, 2013	Jun 13, 2013	Predicted	Predicted	Predicted	Predicted	Predicted
AUTOMOTIVE_HOME	Jun 20, 2013	Jun 18, 2013	Predicted	Predicted	Predicted	Predicted	Predicted
AUTOMOTIVE	Jun 20, 2013	Jun 13, 2013	Predicted	Predicted	Predicted	Predicted	Predicted
BABY	Jun 18, 2013	Jun 18, 2013	Out of Date	Predicting	Predicting	Predicting	Predicting
BACON	Jun 20, 2013	Jun 17, 2013	Predicted	Predicted	Predicted	Predicted	Predicted
BAKED_GOODS	Jun 13, 2013	Jun 13, 2013	Predicted	Predicted	Predicted	Predicted	Predicted
BAKING_MIXES	Jun 13, 2013	Jun 13, 2013	Predicting	Predicting	Predicting	Predicting	Predicting
BAKING_SUPPLIES	Jun 13, 2013	Jun 13, 2013	Predicted	Predicted	Predicted	Predicted	Predicted
BATH	Jun 13, 2013	Jun 13, 2013	Predicted	Predicted	Predicted	Predicted	Predicted
BATTERIES	Jun 13, 2013	Jun 13, 2013	Predicted	Predicted	Predicted	Predicted	Predicted
BREAKFAST	Jun 20, 2013	Jun 13, 2013	Predicted	Predicted	Predicted	Predicted	Predicted
BREAKFAST_FOODS	Jun 13, 2013	Jun 13, 2013	Predicted	Predicted	Predicted	Predicted	Predicted
BREAKFAST_FOOD_FROZEN	Jun 13, 2013	Jun 13, 2013	Predicted	Predicted	Predicted	Predicted	Predicted
BUTTER	Jun 13, 2013	Jun 13, 2013	Predicted	Predicted	Predicted	Predicted	Predicted
CEREAL	Jun 20, 2013	Jun 13, 2013	Predicted	Predicted	Predicted	Predicted	Predicted
CHARCOAL	Jun 13, 2013	Jun 13, 2013	Predicted	Predicted	Predicted	Predicted	Predicted
CHEESE	Jun 13, 2013	Jun 13, 2013	Predicted	Predicted	Predicted	Predicted	Predicted
COCOA	Jun 13, 2013	Jun 13, 2013	Predicted	Predicted	Predicted	Predicted	Predicted
COFFEE	Jun 13, 2013	Jun 13, 2013	Predicted	Predicted	Predicted	Predicted	Predicted
CONDIMENTS	Jun 13, 2013	Jun 13, 2013	Predicted	Predicted	Predicted	Predicted	Predicted
CONES	Jun 13, 2013	Jun 13, 2013	Predicted	Predicted	Predicted	Predicted	Predicted

- The Last Predicted and Last Modeled columns show historical information for individual categories. You can use this information to determine which categories to forecast.
- The icons in each row describe the prediction status of the category for that week:



- To predict any category, click on it, then click the **Predict** button. The category's icons will change to the "Predicting" status icon.
- Once the category has finished predicting, the "Predicted" icon will be shown for the weeks and category selected.

Related Topics

"Predicting the Master Calendar" on page 13

"Financial Metrics Report" on page 14

"Merchandising Actions Report" on page 21

"Forecast Manager Report" on page 24

Performance Report

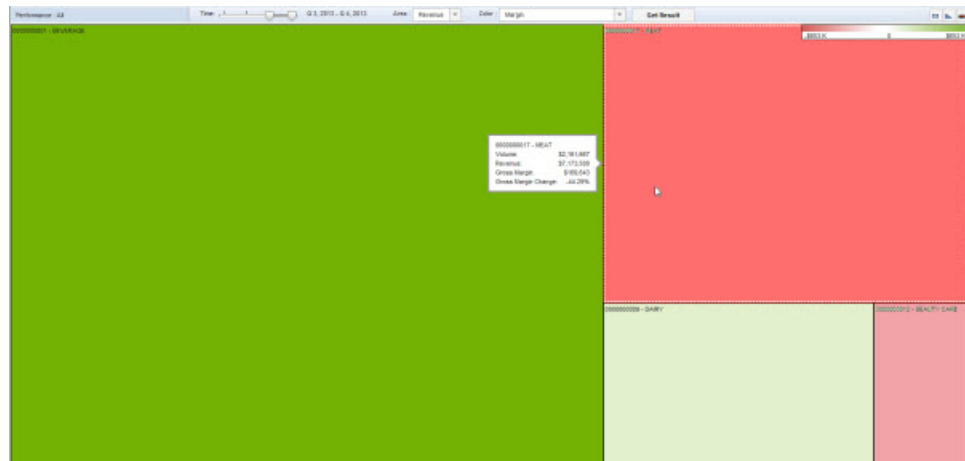
The Performance Report shows a heat map of your product hierarchy's performance, including revenue, margin, and volume.

About this task

The Performance Report shows a heat map of your product hierarchy's performance, including revenue, margin, and volume. This report shows information based on up to 4 quarters of recent data, and enables you to drill down into your hierarchy to view performance details. To use the Performance Report:

Procedure

- Navigate to **Master Calendar > Forecast Manager** from the main drop-down menu.



2. Select the quarters to analyze using the **Time** slider at the top of the report.
3. Select **Revenue** or **Margin** from the **Area** drop-down to select what box size in the heat map represents.
4. The **Color** drop-down selects the metric that drives the "temperature" of the heat map. Select from one of the following:
 - **Revenue**
 - **Margin**
 - **Revenue % Change from Last Year**
 - **Margin % Change from Last Year**
 - **Volume % Change from Last Year**
5. Click **Get Result** to refresh the heat map. When you mouse over any box, a small box will appear, showing you the relevant statistics for the product hierarchy node displayed.
6. To investigate any box's result further, double-click it to load the same heat map for that hierarchy node's sub-nodes.
7. To view the displayed data in table format, click the grid button. The heat map can be hidden and shown using the graph button, while the gradient button shows the metric range for colors from red to green.

Related Topics

"Predicting the Master Calendar" on page 13

"Financial Metrics Report" on page 14

"Merchandising Actions Report" on page 21

"Forecast Manager Report" on page 24

Chapter 4. Master Calendar Administration

This section provides step-by-step instructions for completing administrator tasks.

This chapter will provide step-by-step instructions for completing administrator tasks. Generally, the permissions required for these tasks are only granted to power users or administrators in a company.

Exporting Master Calendar Data

An administrator can use the Task Scheduler to schedule full or incremental exports of performance details from the Master Calendar.

About this task

An administrator can use the Task Scheduler to schedule full or incremental exports of performance details from the Master Calendar. Incremental exports will recognize and include only performance details that have changed since the last export.

The following changes to a performance detail are material to the incremental export: addition/deletion of products or stores, changes to the ad zones, prices, or dates, and deletion of performance details.

Note: For Master Calendar users, you can export data directly from the report using the **Export...** button.

To schedule Master Calendar exports:

Procedure

1. Navigate to **Admin > Task Scheduler**.



2. Click **New Task**.
3. In the **New Task** dialog box, select **Export** as the **Task Type**.

New Task

Actions: Task Type: Task Definition:

Task Details

Description: Active: ☒ Active

Export Task Definition:

Incremental export or full export:

Aggregate at Store level or Ad Zone level:

Export File Compression Threshold:

Schedule

Frequency: ☐ Once ☐ Hourly ☐ Daily ☒ Weekly ☐ Monthly ☐ Annually ☐ Custom

Time Zone:

Start Time: : ☐ AM ☒ PM

Start Date:

Range of Recurrence: ☒ No end ☐ End after ☐ End by

4. Select **Enhanced MC Performance Detail Export** as the **Task Definition**.
5. Enter a **Description** for the export. Unmark the **Active** checkbox if you do not want the export to run.
6. Make a selection for **Incremental export** or **Full export**.
7. Make a selection for **Aggregate at Store level or Ad Zone level**.
8. Select a **Frequency** and **Time Zone**.
9. Enter a **Start Time** and **Start Date**.
10. If you would like the task to continue indefinitely, leave the default **No end** selection for **Range of Recurrence**.
If you would like the task to stop after a certain number of times, select **End after** and enter a number of occurrences.
If you would like the task to stop after a certain date, select **End by** for **Range of Recurrence**, and enter an end date.
11. Choose a **Recurrence Pattern**. Enter a frequency, for example, Every 1 week, and select days on which the automatic export should run. If you would like the export to run more than once per week, select multiple days.

12. Click **Save**.

Calendar Period Administration

You can define customized calendar periods for use in the Master Calendar

In addition to the standard fiscal calendar, you can define customized calendar periods for use in the Master Calendar. To set up custom calendar periods, please contact your IBM Omni-Channel Merchandising representative.

Chapter 5. Report Metric List

The Report Metric List describes all of the metrics in each Master Calendar Report.

The Report Metric List describes all of the metrics in each Master Calendar Report. You may not have access to all reports or fields, depending on your User Type and permissions. Some fields may also be hidden by the report's default settings or by user customization.

Financial Metrics Report

The Financial Metrics Report shows financial metrics for your product hierarchy, including forecasts, targets, custom metrics, and more.

The **Financial Metrics Report** shows financial metrics for your product hierarchy, including forecasts, targets, custom metrics, and more. This report includes the following metrics:

- Target Volume
- Forecast Volume
- Volume Fcst vs Target
- Volume Fcst vs Target%
- Target Revenue
- Forecast Revenue
- Revenue Fcst vs Target
- Revenue Fcst vs Target%
- Target Margin
- Forecast Margin
- Margin Fcst vs Target
- Margin Fcst vs Target%
- Custom Metrics

Note: For more information about defining custom metrics, please contact your IBM representative.

Merchandising Actions Report

The Merchandising Actions report describes activity on the Calendar, showing merchandising actions that have been added to the calendar for pricing, promotional, and markdown price changes.

The **Merchandising Actions** report describes activity on the Calendar, showing merchandising actions that have been added to the calendar for pricing, promotional, and markdown price changes. This report also shows the planned time period for each action. Use this report to visualize merchandising activities over time and plan promotional activity accordingly.

- Name
- Type
- Base Price (at start of analysis period)

- Base Price (at close of analysis period)
- Week
- Month
- Quarter
- Price
- Promoted Volume
- Promoted Revenue
- Promoted Gross Margin \$
- Promoted Gross Margin %
- Non-Promoted Volume
- Non-Promoted Revenue
- Non-Promoted Gross Margin \$
- Non-Promoted Gross Margin %
- Baseline Volume
- Baseline Revenue
- Baseline Gross Margin \$
- Baseline Gross Margin %
- Incremental Volume
- Incremental Revenue
- Incremental Gross Margin \$
- Incremental Gross Margin %
- Total Volume
- Total Revenue
- Total Gross Margin \$
- Total Gross Margin %
- % Change vs. Baseline Volume
- % Change vs. Baseline Revenue
- % Change vs. Baseline Gross Margin \$
- % Change vs. Baseline Gross Margin %

Forecast Manager Report

The Forecast Manager enables you to create category-level forecasts in the Master Calendar.

The **Forecast Manager** enables you to create category-level forecasts in the Master Calendar. Use the Forecast Manager to create predictions for the category across all pricing actions available in the calendar. This report includes the following metrics:

- Category
- Last Predicted
- Last Modeled
- Status
- Week

Chapter 6. Glossary

This glossary provides terms and definitions for the [product name] 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).

“C” “F” “M” “P” “R” on page 34 “W” on page 34

C

collision detection

In carrier sense multiple access with collision detection (CSMA/CD), a signal indicating that two or more stations are transmitting simultaneously.

F

forecast

A function that can provide a prediction of future performance of a managed system using past data collected on that managed system.

M

markdown optimization

The process used to determine the price point at which sales for a product are maximized while profit is maintained.

P

performance detail

A merchandising strategy. This includes product displays, temporary price reduction, or everyday low pricing.

product hierarchy

A representation of the different levels of product groupings. Levels of the hierarchy can represent groupings such as product class, product family, product line, and so on.

promotion group

A variation on a single promotion that allows the impact of different promotion variables to be compared.

R

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.

W

workflow

The structured sequence of activities and tasks that are used to implement a specific change, release, or other process, including automatic routing and tracking of records for approval and other tasks.

workflow process

A category type used for tracking the status of a promotion or category plan.

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