

IBM Customer Trade Planning

Users' Guide

IBM

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Chapter 1. Introduction

Customer Trade Planning helps you to effectively plan, predict, and optimize promotions and plans. Using this solution, you can determine which plans and promotions yield the best return and how each promotion will impact consumer demand for both base and promotional sales.

Audience

Customer Trade Planning is designed for various audiences including Headquarters Merchandising Executives, Field Account teams, Sales Strategy and Trade Analytic teams, and IT Administrators.

How IBM Customer Trade Planning is Used

IBM® Customer Trade Planning is designed to be used by different roles throughout your organization, including the following:

- Trade Marketing - develop best practices for customer account teams
- Finance - Assess impact of trade spend and quantify ROI; use post-event and merchandising analyses
- Customer Marketing - Develop sell-in plans to achieve category growth; utilize total account and division
- Category Management - Develop insights to shape retail category strategies; use national-, market-, and account-level data sets
- Account Teams - Develop what-if promotion scenarios; build and predict category sell-in plans

About IBM Omni-Channel Merchandising Applications

IBM Omni-Channel Merchandising applications are accessed through the web browser. Each time a button is clicked in the application, you are sending a request for data via the internet. As such, the speed of the application can be affected by the following:

- Volume on the web
- Bandwidth of the your company's network
- Firewalls or other web-accessibility restrictions imposed by your company
- Number of rows displayed in a grid

Accessing IBM Omni-Channel Merchandising Services

About this task

You enter Customer Trade Planning from the **Home** page. You must first log in with a user name and password.

To access the Customer Trade Planning application:

Procedure

1. Open Internet Explorer and navigate to the login page (<https://mydt.demandtec.com> or <https://companyname.demandtec.com>).

Sign In

[English](#) | [Français](#) | [中文](#) | [Español](#) | [日本語](#)

User Name

Password

Sign In

[Forgot Password](#)

Don't have a network account?
[Sign up for free](#)

Looking for Support?
Visit our [Customer Support](#) page.

2. Enter your login details and click **Sign In**.
3. If you have access to more than once instance of the application, the **Select Instance** page displays. Click an instance to access it.
4. Your home page opens. Depending on your configuration, this may be the **Home** page, Deal Management **Home** page or **My Account** page.
5. Choose **Customer Trade Planning** from the services drop-down menu to open the application.

Related Topics

“Logging in as a New User” on page 3

“Resetting Your Password” on page 4

“Resetting a Forgotten Password” on page 4

“Logging Out of IBM Omni-Channel Merchandising” on page 5

Logging in as a New User

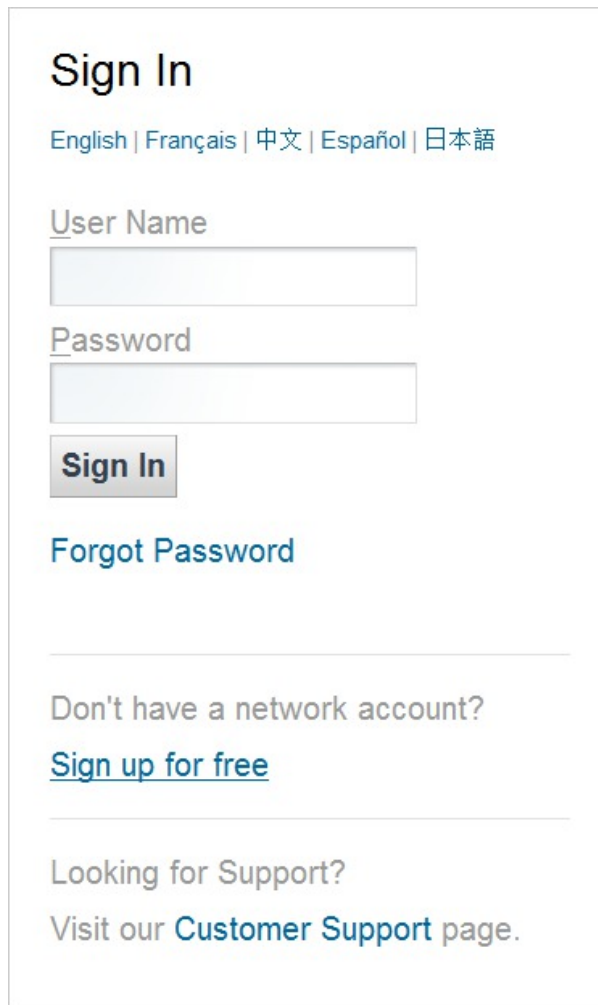
About this task

If you do not have login information, you can create a new user account from the login page.

To create a new user account:

Procedure

1. Open Internet Explorer and navigate to the login page (<https://mydt.demandtec.com> or <https://companyname.demandtec.com>).



The screenshot shows a 'Sign In' form with the following elements:

- Language selection: English | Français | 中文 | Español | 日本語
- User Name input field
- Password input field
- Sign In button
- Forgot Password link
- Don't have a network account? section with a Sign up for free link
- Looking for Support? section with a link to the Customer Support page

2. Click the **Sign up for free** link to open the **Network Account Creation** form.
3. Enter your information in the fields. Be sure to use your corporate email address, as the application uses the email address to help authenticate your request. Click **Submit**.
4. You will receive an email with a temporary password. Use the temporary password to log in.
5. The **Terms of Use** page opens. Read and accept the agreement.
6. The **Reset Your Password** page opens. Enter your new password. The password must meet the following requirements:

- At least eight characters
- At least one letter
- At least one number

Under **Deal Management**, select **No** and click **Continue**.

7. If the application was able to create your account without further authentication, the **Home** page opens. Otherwise, Customer Support will contact you for further details.

Resetting a Forgotten Password

About this task

To reset your password if you have forgotten it:

Procedure

1. From the login page, click **Forgot Your Password?**. The **Reset Password** page opens.
2. Enter your **User Name** and click **Send New Password**.
3. You will receive a temporary password. Use this password to log in and then enter a new password.

Resetting Your Password

About this task

To reset your password from within the application:

Procedure

1. From the **My Account** page, click **Security settings > Edit**.
2. Enter your new password and click **Continue**.
3. The confirmation page opens. From here, you can use the services drop-down menu to return to an application.

My Account Page

Use the **My Account** page to change information related to your account. You can change your password, open a different instance, open a specific application or create a new Customer Support case.

Note: If you open multiple browser windows, they will all access the same instance. You cannot access two instances at the same time.

The page includes these links:

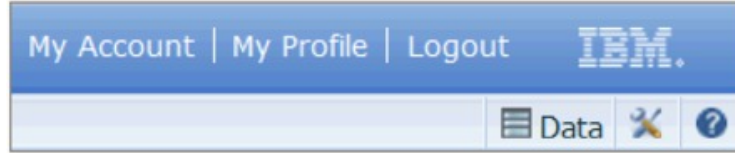
- **Security settings > Edit** allows you to change your existing password. See “Resetting Your Password.”
- **Current Instance Change** allows you to switch to another instance of IBM Omni-Channel Merchandising.
- **Support** opens the Customer Support website, which allows you to submit tickets.
- Application links (**OpenLink**, **Price**, etc.) open various IBM Omni-Channel Merchandising applications.

Related Topics

“Resetting Your Password”

Logging Out of IBM Omni-Channel Merchandising

You can exit the application by clicking the **Logout** link at the top of any page. All saved settings will be preserved for the next login.

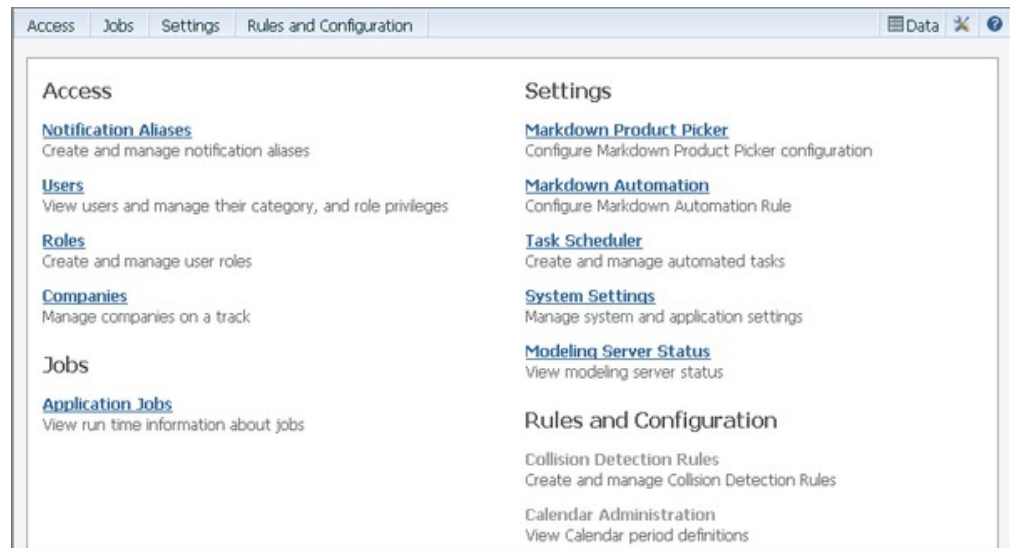


If you close the browser window or navigate to a different web page without logging out, the application automatically logs you out after 30 minutes of inactivity. IBM Customer Support can configure a different session time-out period, such as 15 or 60 minutes based on your company's usage patterns and security policies.

Note: You should log out when not using the application to maintain security and free up system resources.

Admin Overview Page

The **Admin Overview** page displays links to the application pages used for administrative tasks and settings. You can also access the same pages from the **Admin** sub-menu in the top navigation bar. From this page, you can define your users, roles, and manage system settings as an administrator. You can also create and manage automated tasks in the Task Scheduler, and configure settings.



Editing 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.

To edit users:

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**. Click **OK** to return to the **Users** page.

User Information	
First Name	Bob
Last Name	Manogue
Login Id	newdmusr
Email	bmanogue@foo.com
City	Anytown
State	California
Country	UNITED STATES
Telephone	17075551234
Language	English
Time Zone	(GMT+00:00) Africa/Abidjan
Deactivated	<input type="checkbox"/>

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.
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.

Subscribing 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.

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. 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.

To subscribe users to alerts:

Procedure

1. Choose **Alert Subscriptions** from the **Tools** menu to open the **Alert Subscription** page.

Alert Description	Subscription		Sender	Category
	Email	Inbox		
CP - Corporate View Task Failed	<input type="checkbox"/>	<input type="checkbox"/>	All	All Categories
CP - HQ Guidelines Published	<input type="checkbox"/>	<input type="checkbox"/>	All	All Categories
Campaign Created	<input type="checkbox"/>	<input type="checkbox"/>	All	All Categories

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.

Note: Only certain alerts can be filtered by sender.

5. Click in the **Category** and **Division** columns to filter the alert for one or more categories and divisions.

Note: Only certain alerts can be filtered by category or division.

6. Click **Done** to save your changes and exit the page.

Setting up Notification Aliases

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.

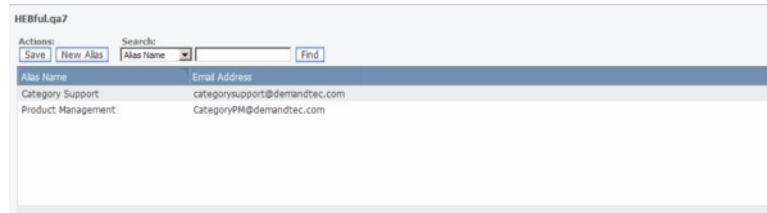
For each alias, the administrator can configure the alerts that the alias should receive in the same way that alerts are subscribed for an individual user.

Note: The **Administer Notification Aliases** permission is required.

To set up email aliases to receive alerts:

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.

Chapter 2. Getting Started

Navigating the Application

For information on navigating through the promotion management process and getting started, see “Process Overview” on page 19. For basic tasks such as saving your progress and customizing your view, see “Navigation Basics.”

Note: You need to clear your internet browser cache the first time you load the application. For more information on clearing your cache, see “Clearing Your Cache” on page 18.

Related Topics

“Process Overview” on page 19

“Navigation Basics”

“Clearing Your Cache” on page 18

Navigation Basics

The interface includes the following navigational features:

- Explicit **Save** button (see “Saving Your Progress”)
- Inline editing (see “Inline Editing” on page 10)
- Explicit **Refresh** button (see “Refreshing the Page” on page 10)
- Top-level **Date Range** functionality (see “Date Range” on page 10)
- Icons, both for explicit functions and advanced sorting options (see “Icons” on page 10)
- Customizable views, including sorting and filtering (see “Customizing Your View” on page 13.)
- Exportable views and reports (see “Exporting Your View” on page 12)
- Right-click context menus

Related Topics

“Saving Your Progress”

“Inline Editing” on page 10

“Refreshing the Page” on page 10

“Date Range” on page 10

“Icons” on page 10

“Customizing Your View” on page 13

“Exporting Your View” on page 12

Saving Your Progress

When you make changes in the **Plans**, **Promotions**, **Tactics** and **Allowances** tabs, the **Save** button is enabled.



Clicking **Save** will save all changes you have made in every tab. You should save whenever you have finished completing your changes. If you have not made any changes, the Save button will not be enabled.



Inline Editing

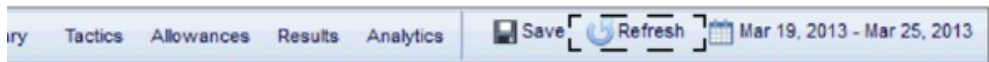
Certain cells in the **Plans**, **Promotions**, **Tactics** and **Allowances** grids are editable. If a cell is editable, the border of the cell will be highlighted.

	Name	ID	Run ID	Description	Code
	YY_B075	76203	46717		
	YY_B075	76202			

To edit a cell, click inside it and type the new information, then click **Save**. Note that certain cells are not editable, such as metric or status fields.

Refreshing the Page

Because the application does not always automatically refresh, you must occasionally click the **Refresh** button in the interface to view status changes.



Date Range

To change the date range for all views and tabs, click **Date** and enter the desired date range.
























Note: The default date range is 1 week, with the current date as the **Start** date. However, when you enter a new date range, the dates you enter will be saved as the new default, and will load automatically each time you log in.

Icons

Many functions in the application are displayed as icons for easy access.

Note: You can also mouse over icons in the interface for a quick description of them.

Icon	Function
	Export: Click this icon in the upper left-hand side of a grid to access a drop-down menu that allows you to export your data in Excel or PDF format.
	Visibility: Displays whether a promotion or plan is public or private.
	Lock: Disables editing for a promotion or plan when applied. Click on the plan/promotion you want to lock, then click the appropriate cell in the lock column. The lock icon will appear once the plan/promotion has been successfully locked. If the icon is greyed out, you do not have permission to unlock the plan or promotion. See “Locking/Unlocking Promotions” on page 39 and “Locking/Unlocking Plans” on page 45 for more information.
	Locked in Plans: This means a promotion is locked within a locked plan, but that you have the proper permissions enabled to unlock the promotion or plan. If the icon is greyed out, you do not have permission to unlock the plan or promotion. See “Locking/Unlocking Plans” on page 45 for more information.
	HasTPR: The promotion includes a Temporary Price Reduction tactic.
	HasAd: The promotion includes an Ad tactic.
	HasDisplay: The promotion includes a Display tactic.
	HasOpenPD1: The promotion includes a user-defined tactic.
	HasOpenPD2: The promotion includes a user-defined tactic.
	Has UEV: The promotion includes a User-Entered Volume tactic.
	Has Distribution: The promotion includes a Distribution tactic.
	HasEDLP: The promotion includes an Everyday Low Price tactic.
	HasOther: A custom label for promotions.
	Prediction Status: This column displays whether the status of a plan or promotion is Not Predicted , Predicting , Predicted or Error Predicting .

Icon	Function
	Error Predicting
	Not Predicted
	Predicted
	Predicting
	Save Status: This column displays whether there has been an error in saving your promotion or plan.
	Error Saving
	Analysis Status: This column displays whether you have analyzed a promotion by clicking Analyze .

Exporting Your View

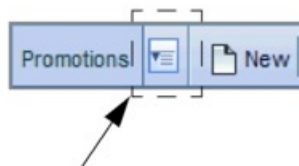
About this task

You can export data in Excel or PDF format for easier visualization and manipulation.

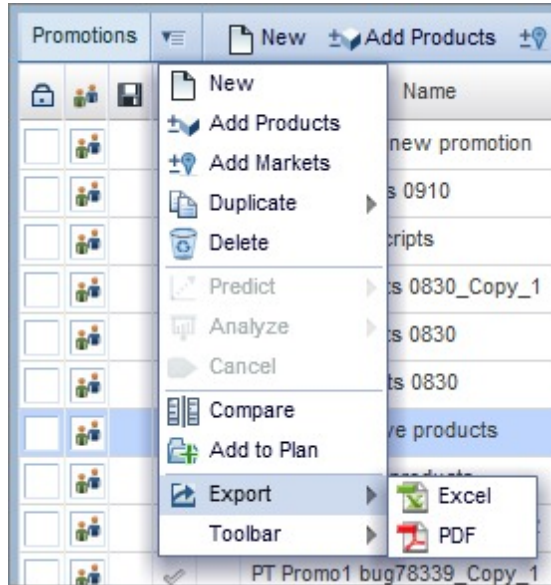
To export the data in a grid:

Procedure

1. Click the icon in the upper left-hand side of the grid:



2. Select **Export** from the drop-down menu:



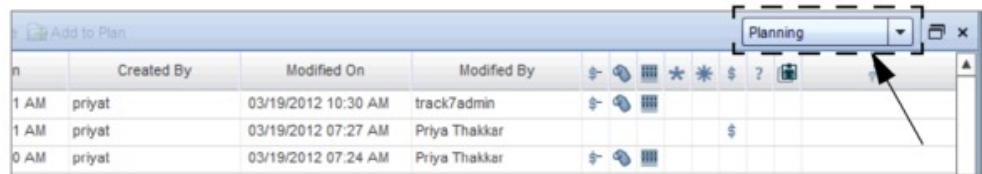
3. Select **Excel** or **PDF** format.

Note: You can also right-click on an individual item in a grid and select **Export**.

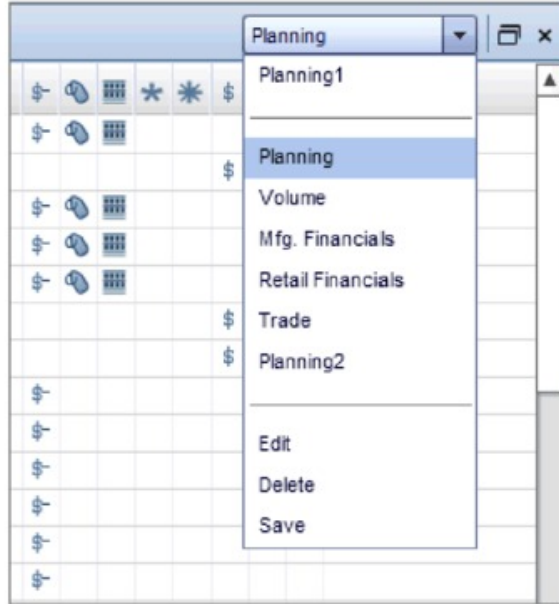
Customizing Your View

The **Promotions** and **Plans** view is customizable. You can view different aggregations of metrics for reporting purposes, show, hide or reorder columns and save the views you create.

To customize your view, click the view drop-down menu located on the right-hand side of the interface.



From here, you can view different metric aggregations by selecting **Planning**, **Volume**, **Mfg. Financials**, **Retailer Financials**, or **Trade**. Additionally, you can save, edit or load any views you have previously created.



The following table summarizes the standard metric aggregations:

Metric Aggregation	Description
Planning	Provides the high-level details of each promotion, including tactic types.
Volume	Lists forecasted volumetric results for base, incremental and total units, cases, or EQC. Displays lift and promoted and non-promoted volume.
Mfg. Financials	Displays financial metrics for the manufacturer including cost, revenue and margin. Note: You can hide manufacturer cost metrics so that other non-authorized users can not view them. Contact your IBM representative for more information.
Retail Financials	Similar to Mfg. Financials, but with metrics for the retailer instead.
Trade	Displays various trade spend, cost per incremental unit/case or EQC.

Related Topics

“Creating a Custom View”

“Sorting and Filtering Within the Grid” on page 18

Creating a Custom View

About this task

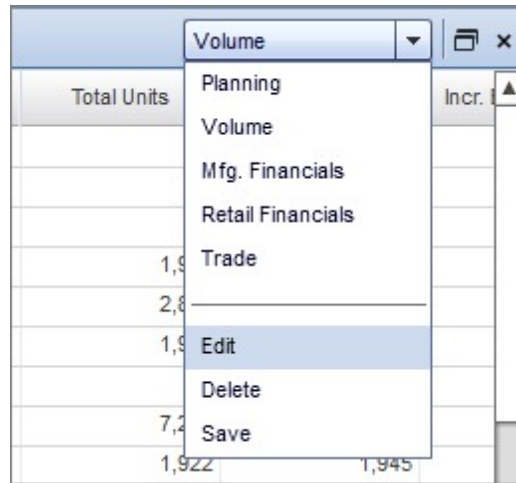
To create a custom view:

Procedure

1. Select **Edit** from the view selection drop-down menu located on the right-hand side of the interface.

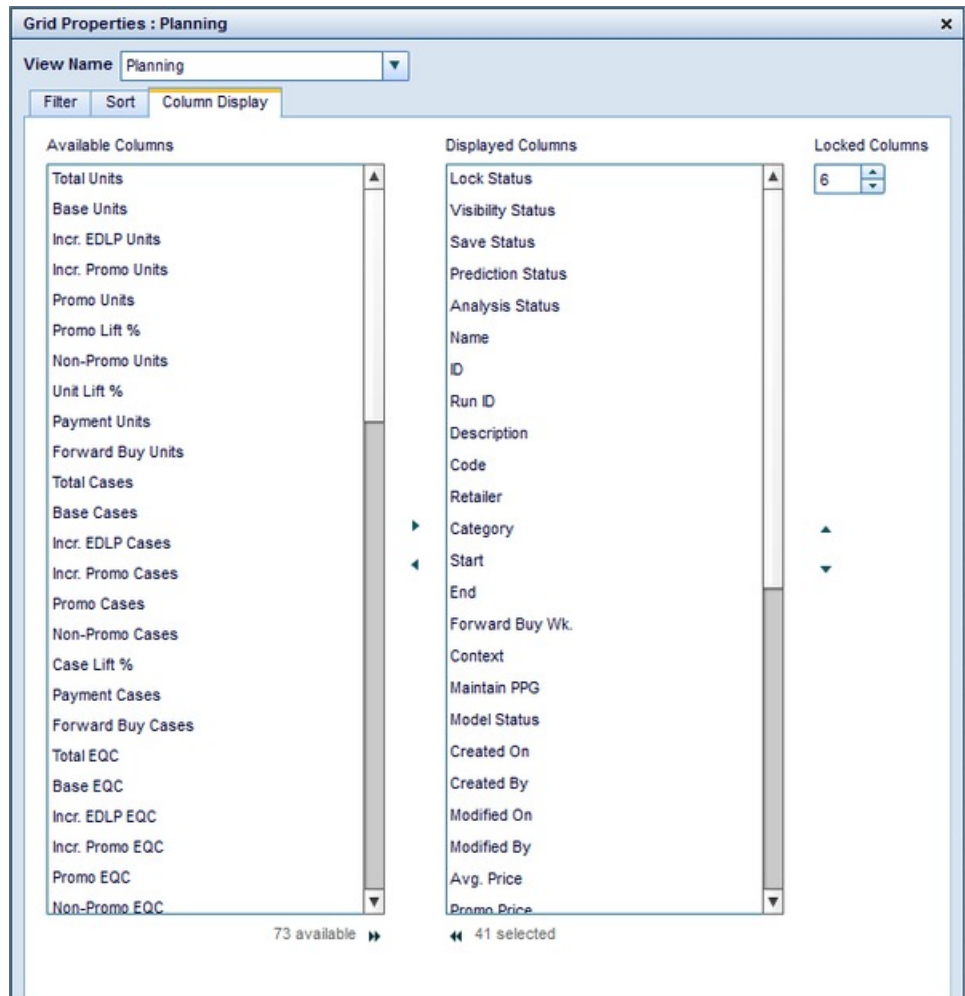


n	Created By	Modified On	Modified By						
1 AM	priyat	03/19/2012 10:30 AM	track7admin	\$					
1 AM	priyat	03/19/2012 07:27 AM	Priya Thakkar	\$					
0 AM	priyat	03/19/2012 07:24 AM	Priya Thakkar	\$					



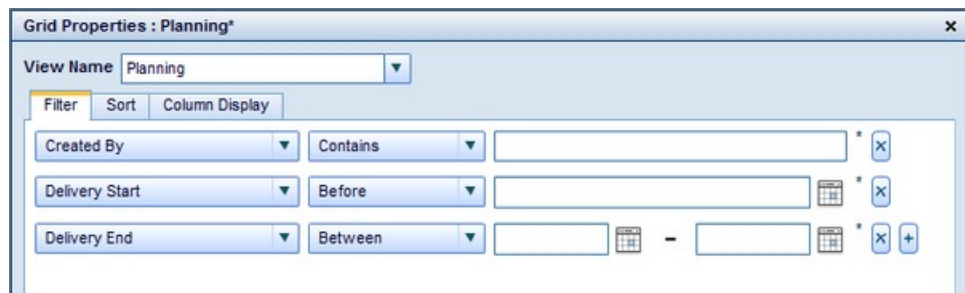
Total Units	Volume	Incr.
	Planning	
	Volume	
	Mfg. Financials	
	Retail Financials	
1,9	Trade	
2,8		
1,9	Edit	
	Delete	
7,4	Save	
1,922		1,945

2. The following pop-up will display:

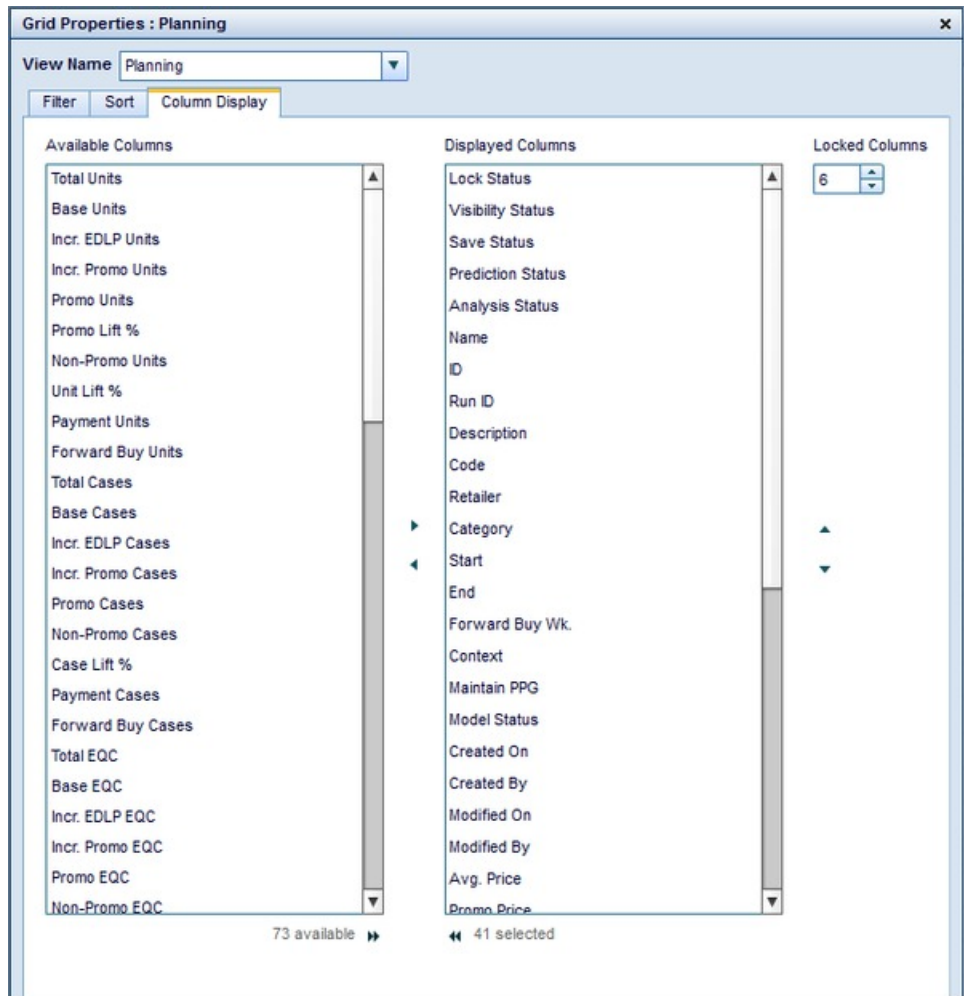


From here, you can apply **Filter**, **Sort** and **Column Display** settings. You can also enter a name in the **View Name** field.

3. Select the **Filter** tab to specify entries for each column. Select a column name from the drop-down menu and then select the filter you want to apply. Click the + icon to create additional filters. Click the x icon to remove a filter.



4. Select the **Sort** tab to sort specific columns. Select the column and sorting order from the drop-down menus. Click the + icon to create additional sort orders. Click the x icon to remove a sort order.
5. Select the **Column Display** tab to show, hide or lock columns.



You can click and drag a column names in the **Available** column list and the **Displayed Columns** list. To hide a column, move it from the Displayed Columns list to the Available list. To show a column, move it from the Available list to the Displayed Columns list. You can select multiple columns in either list by using the Shift and Ctrl keys. You can also create “freeze panes” or lock columns by entering a number of **Locked Columns**. For example, if you enter “2” in this field, the first two columns in the grid will be locked in place when you scroll.

Note: When viewing the grid itself, you can reorder columns by simply clicking and dragging column headers.

6. Click **Save and Apply**, or **Apply** to apply your settings to the grid without saving.

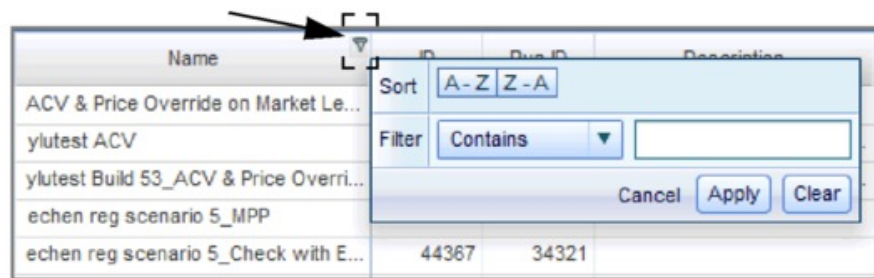
Note: You can save your view as a default company-wide view, if you have the **Administer Company Wide UI Preferences** user permission. Click **Save** from the view selection drop-down, and select the checkbox for **Save as company pref**, then click **Save**.



Sorting and Filtering Within the Grid

You can also sort and filter columns within the grid itself. To sort columns, simply click the column header name to sort in ascending or descending order. To filter columns, point to the column header and click the filter icon:

Click here to open
sorting/filtering
options



You can then select filtering options from the window.

Note: You can also reorder columns by clicking and dragging column headers to move them.

Select **Save** from the view selection drop-down to save any view you create in the grid.

Clearing Your Cache

About this task

You need to clear your internet browser cache the first time you load the application to ensure optimal performance.

To clear your cache in Internet Explorer:

Procedure

1. Exit the application.
2. In Internet Explorer, open the **Tools** menu and click **Internet Options**.
3. Select the **General** tab if it is not already selected. In the **Browsing history** section, click **Delete**.
4. Click **Delete files...** for **Temporary Internet Files**, **Cookies**, and **History**. When prompted for confirmation, click **Yes**.
5. Click **Close**. Log in to the application.

Note: When you log in to the application, the interface may take a minute to load. However, after this initial load, subsequent interactions will be much faster.

Process Overview

About this task

You can easily create promotions and plans in the application. The following steps provide a quick overview of basic promotion management, from the promotion creation process to prediction.

Procedure

1. Create a new promotion (“Step 1: Creating New Promotions”)
2. Add tactics to your promotion (“Step 2: Adding Tactics to a Promotion” on page 20)
3. Add allowances to your promotion (“Step 3: Adding Allowances to a Promotion” on page 21)
4. Predict your promotion (“Step 4: Predicting Promotions” on page 21)
5. Create a plan (“Step 5: Creating a New Plan” on page 22)
6. Add promotions to your plan (“Step 6: Adding Promotions to a Plan” on page 22)
7. Predict your plan (“Step 7: Predicting Plans” on page 22)

For more detailed information on promotion management, see Chapter 3, “Working With Promotions,” on page 23. For more information on plans, see Chapter 4, “Working With Plans,” on page 41.

Related Topics

“Step 1: Creating New Promotions”

“Step 2: Adding Tactics to a Promotion” on page 20

“Step 3: Adding Allowances to a Promotion” on page 21

“Step 4: Predicting Promotions” on page 21

“Step 5: Creating a New Plan” on page 22

“Step 6: Adding Promotions to a Plan” on page 22

“Step 7: Predicting Plans” on page 22

Step 1: Creating New Promotions

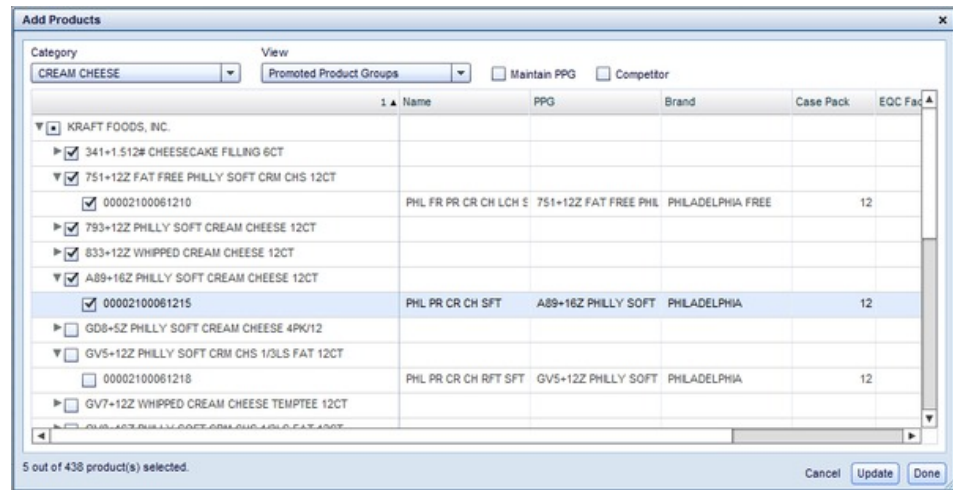
About this task

To create a new promotion:

Procedure

1. Make sure the **Promotions** tab is selected.
2. Click **New** to create a new row in the **Promotions** grid.
3. Enter a **Name**.
4. Enter a **Description**, **Code**, or **Comments** if desired.
5. Select a **Retailer** from the drop-down menu.

6. Click **Add Products...** Select a **Category** from the drop-down menu. You can use the **View** drop-down menu to view products by **Brands, Promoted Product Groups, Line Groups, or Static Product Groups**. You can also simulate a competitor's promotional activity within a scenario by selecting the checkbox for **Competitor** or select the checkbox for **Maintain PPG** to associate selected Promoted Product Groups with your promotion.
7. Click the arrow icon next to a checkbox to expand the group. Click the checkbox to select all products within that group. To add an individual product, click the checkbox next to it. To remove it, clear the checkbox.



8. Click **Update** to save your changes without closing the dialog box.
9. Click **Add Markets...** Select a **Retailer** from the drop-down list. Select a **Location Group Class**, if applicable.
10. Click the arrow icon next to a checkbox to expand the group. Click the checkbox to select all markets within that group. To add an individual market, click the checkbox next to it. To remove it, clear the checkbox.
11. Click **Update** to save your changes without closing the dialog box.
12. Click **Done** to save and close the dialog box.
13. Click **Save**.

Step 2: Adding Tactics to a Promotion

About this task

To add tactics to a promotion:

1. Make sure the **Promotions** tab is selected.
2. Click the promotion you want to add tactics to.
3. Click the **Tactics** tab.
4. Enable a tactic by clicking the checkbox next to it.
5. Select the type of tactic from the **Type** drop-down menu. Enter a value for the promotion in the appropriate cell in the **Value** column.
6. Select a level of compliance from the **Compliance** drop-down menu, if applicable. You can select **Historical Low, Historical Mean, Historical High** or **Override**.
7. Enter a **Start** and **End** date.
8. Click **Save**.

You can also edit the products or markets that are included in a tactic.

To edit a tactic:

1. Make sure the **Tactics** window is open with the promotion you want to edit selected.
2. Click **Edit**.
3. Remove products in the **Product View** tab to exclude them from the tactic. Remove markets in the **Location View** tab to exclude them from a tactic.
4. Click **Update** to save without closing. Click **Done** to save and close the window.

Step 3: Adding Allowances to a Promotion

About this task

To add an allowance to a promotion:

1. Make sure the **Promotions** tab is selected.
2. Click the promotion you want to add an allowance to.
3. Click the **Allowances** tab.
4. Enable an allowance by clicking the checkbox next to it.
5. Select a **Type** from the drop-down menu.
6. Select **Per Item** or **Per Case** from the **Value** drop-down menu, if applicable. Then, enter a numerical value in the field. If you are adding a **Flat Fee** allowance, you only need to enter a numerical value.
7. Enter a value in the **Forward Buy Wk.** field, if applicable.
8. Enter a **Start** and **End** date.
9. Click **Save**.

You can also edit the markets or products the allowance applies to (edit participation).

To edit participation:

1. Make sure the **Allowances** window is open with the promotion you want to edit selected.
2. Click **Participation**.
3. Remove products to exclude them from the allowance. Remove markets to exclude them from the allowance.
4. Click **Ok**.

Step 4: Predicting Promotions

About this task

To predict a promotion:

Procedure

1. Make sure the **Promotions** tab is selected.
2. Click the promotion you want to predict. Be sure to save any changes you make to the promotion.
3. Click **Predict**.

Step 5: Creating a New Plan

About this task

To create a new plan:

Procedure

1. Make sure the **Plans** tab is selected.
2. Click **New** to create a new row in the **Plans** grid.
3. Enter a **Name** and **Description** in the appropriate field.
4. Select a **Retailer** and **Category** from their respective drop-down menus.
5. Enter a **Start** and **End** date.
6. Enter a value in the **Accrual Rate** and **Fixed Funding** fields, if applicable.
7. Select a **Workflow Status** from the drop-down menu.
8. Click **Save**.

Step 6: Adding Promotions to a Plan

About this task

To add promotions to a plan:

Procedure

1. Make sure the **Plans** tab is selected.
2. Click the plan you want to add promotions to.
3. Click **Add Promotions** in the **Plans** grid.
4. Click the checkbox corresponding to the promotion you want to add.
5. Click **Ok**.

Step 7: Predicting Plans

About this task

To predict a plan:

Procedure

1. Make sure the **Plans** tab is selected.
2. Click the plan you want to predict. Be sure to save any changes you make to the plan.
3. Click **Predict**.

Now that you have predicted promotions and plans, you can analyze and compare your results in the **Analytics** and **Summary** grids. You can also view detailed and customizable reporting in the **Results** grid. See Chapter 3, "Working With Promotions," on page 23 and Chapter 4, "Working With Plans," on page 41 for more information.

Chapter 3. Working With Promotions

You create promotions to decide which merchandising strategies generate the best results. Promotion information includes dates, products to promote, markets, tactics, and allowances. You create promotions in the **Promotions** grid by adding a date, products, and markets. You can add tactics and allowances to a promotion by clicking the **Tactics** and **Allowances** tabs.

Note: You can also perform some of the actions described below on an individual promotion by right-clicking on it.

Related Topics

“Creating New Promotions”

“Adding Promotions to a Plan” on page 25

“Adding Tactics to a Promotion” on page 26

“Adding Allowances to a Promotion” on page 28

“Comparing Promotions” on page 32

“Viewing Results” on page 34

“Viewing Analytics” on page 35

“Locking/Unlocking Promotions” on page 39

Creating New Promotions

About this task

You create and edit promotions within the **Promotions** grid directly. When you create a promotion, you create a time frame and a range of markets and products the promotion applies to.

To create a new promotion:

Procedure

1. Make sure the **Promotions** tab is selected.
2. Click **New** to create a new row in the **Promotions** grid.
3. Enter a **Name**.
4. Enter a **Description**, **Code**, or **Comments** if desired.
5. Select a **Retailer** from the drop-down menu.
6. Enter start and end dates in the **Order**, **Ship** or **Delivery** fields, if applicable.

Note: The default start and end dates for these fields are the start and end dates for the promotion you created. The order/ship/delivery start and end date can not be later than the start/end date of the promotion. The start date for the promotion is entered when you add tactics to the promotion. For more information, see “Adding Tactics to a Promotion” on page 26.

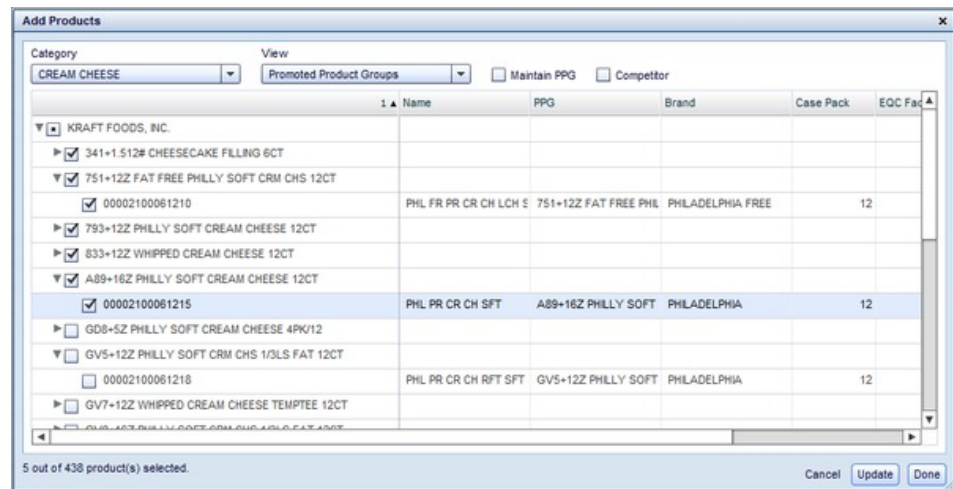
7. Click **Add Products...** Select a **Category** from the drop-down menu. You can use the **View** drop-down menu to view products by **Brands**, **Promoted Product Groups**, **Line Groups**, or **Static Product Groups**. You can also

simulate a competitor's promotional activity within a scenario by selecting the checkbox for **Competitor** or select the checkbox for **Maintain PPG** to associate selected Promoted Product Groups with your promotion.

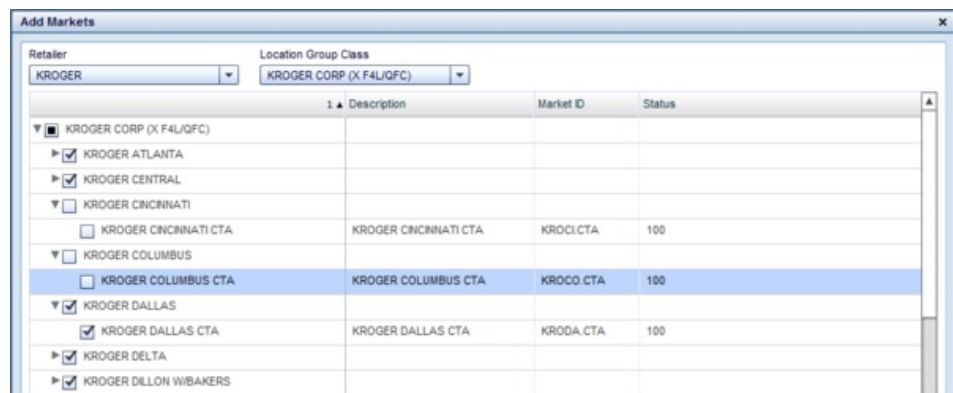


Note: For more information on creating static product groups, see “Creating Static Product Groups” on page 40.

8. Click the arrow icon next to a checkbox to expand the group. Click the checkbox to select all products within that group. To add an individual product, click the checkbox next to it. To remove it, clear the checkbox.



9. Click **Update** to save your changes without closing the dialog box.
10. Click **Add Markets...** Select a **Retailer** from the drop-down list. Select a **Location Group Class**, if applicable.
11. Click the arrow icon next to a checkbox to expand the group. Click the checkbox to select all markets within that group. To add an individual market, click the checkbox next to it. To remove it, clear the checkbox.



12. Click **Update** to save your changes without closing the dialog box.
13. Click **Done** to save and close the dialog box.
14. Click **Save**.

Note: Once you predict the promotion, the appropriate metrics will populate the remaining cells in the row.

Related Topics

“Adding Promotions to a Plan”

“Adding Tactics to a Promotion” on page 26

“Adding Allowances to a Promotion” on page 28

“Creating Static Product Groups” on page 40

Adding Promotions to a Plan

About this task

Once you complete a promotion, you can easily add it to a plan you have created. In order to add a promotion to a plan, the promotional details must coincide with the plan. The possible promotions you can add to a plan are constrained by the date range, category and retailer assigned to the plan.

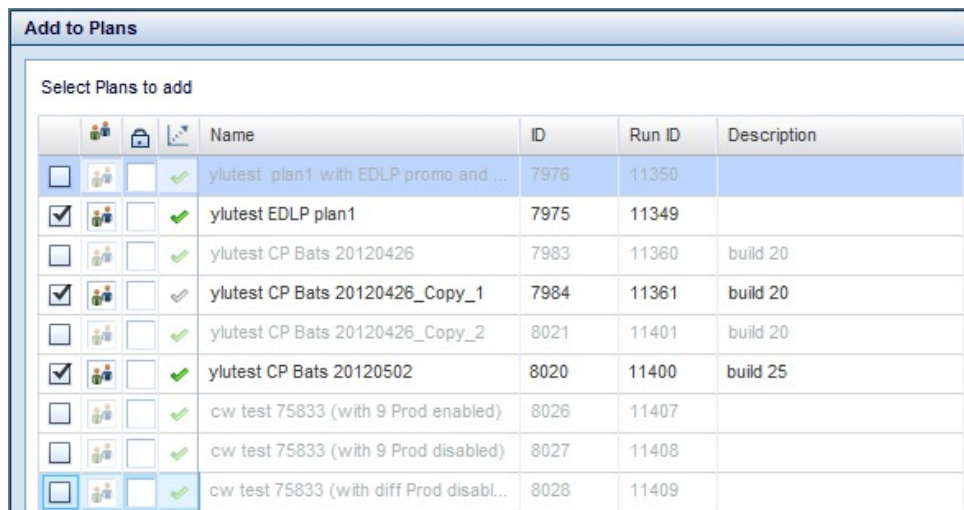
To add promotions to a plan:

Procedure

1. Click the promotion you want to add to the plan.

Note: You can select multiple promotions to add to a plan by holding the Shift or Ctrl key while you click. Use the Shift key to select multiple adjacent promotions, and the Ctrl key to select non-adjacent promotions.

2. Click **Add to Plan**.
3. The **Add to Plans** dialog box will open.



The screenshot shows a dialog box titled "Add to Plans" with a sub-header "Select Plans to add". It contains a table with columns for Name, ID, Run ID, and Description. Each row has a checkbox, a lock icon, and a green checkmark icon. The second row is selected.

	Name	ID	Run ID	Description
<input type="checkbox"/>	ylutest plan1 with EDLP promo and ...	7976	11350	
<input checked="" type="checkbox"/>	ylutest EDLP plan1	7975	11349	
<input type="checkbox"/>	ylutest CP Bats 20120426	7983	11360	build 20
<input checked="" type="checkbox"/>	ylutest CP Bats 20120426_Copy_1	7984	11361	build 20
<input type="checkbox"/>	ylutest CP Bats 20120426_Copy_2	8021	11401	build 20
<input checked="" type="checkbox"/>	ylutest CP Bats 20120502	8020	11400	build 25
<input type="checkbox"/>	cw test 75833 (with 9 Prod enabled)	8026	11407	
<input type="checkbox"/>	cw test 75833 (with 9 Prod disabled)	8027	11408	
<input type="checkbox"/>	cw test 75833 (with diff Prod disabl...	8028	11409	

This dialog box displays plans with a retailer, category, and time-period that coincide with your selected promotion(s).

4. Select a plan by clicking the checkbox next to it. You can select multiple plans. You can also lock or unlock a plan from this dialog box.

Note: Any promotion can be added to an unlocked plan regardless of whether the promotion is locked or unlocked. However, you can't add promotions to a

plan another user locked unless you have proper permissions enabled. Contact your IBM representative for more information about enabling these permissions. For more information on locking plans, please see Locking/Unlocking Plans.

5. Click **Ok**.

Note: When you edit a promotion in the **Promotions** grid after you have added it to a plan, the promotion in the **Plans** grid will be updated as well. However, if you edit the date range of a promotion so it is outside the date range of the plan, that promotion will not be included in the plan prediction. If you edit the **Retailer** or **Category** of a promotion so it no longer coincides with the plan, the plan prediction will result in an error.

Adding Tactics to a Promotion

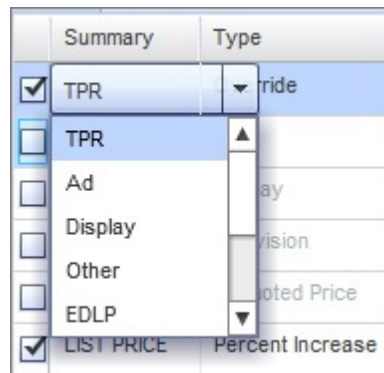
About this task

Because the **Tactics** window is seeded, you can view a promotion and add multiple tactics at the same time.

To add tactics to a promotion:

Procedure

1. Make sure the **Promotions** tab is selected.
2. Click the promotion you want to add tactics to.
3. Click the **Tactics** tab.
4. Enable a tactic by clicking the checkbox next to it. After you have clicked the checkbox, you can also change the tactic from the drop-down menu.



5. Select the type of tactic from the **Type** drop-down menu. Enter a value for the promotion in the appropriate cell in the **Value** column.
6. Select a level of compliance from the **Compliance** drop-down menu, if applicable. You can select **Historical Low**, **Historical Mean**, **Historical High** or **Override**. If you select **Override**, enter a value representing the percentage of effective compliance.
7. Enter a **Start** and **End** date. The default duration is 2 weeks. Enter a date range in the appropriate field, click the calendar icon to select a date using the calendar widget, or enter a number of days in the appropriate field. Click the **Day** tab to specify the number of days after the start date. Click the **Week** tab to specify a number of weeks after the start date. Click the **Quarter** tab to specify a number of quarters after the start date. Click the **Year** tab to specify a fiscal year.

- Click **Ok**.

Note: If you enter a **Start** or **End** date outside the date range of the promotion, the date range of the promotion will update to match it. If you edit the **Start** date of a promotion, the date range(s) for the associated tactics and allowances will also update.

- Click **Save**.

Related Topics

“Editing Tactics”

“Adding Allowances to a Promotion” on page 28

Editing Tactics

About this task

By default, the tactics you add to a promotion are applied to all products and markets originally added to that promotion. However, you can exclude markets or products from a tactic. This feature is useful if certain products are promoted using an in-store display while others are promoted through an advertisement in a circular, or if certain products are promoted differently in different retailers.

To edit a tactic:

Procedure

- Make sure the **Tactics** window is open with the promotion you want to edit selected.
- Click **Edit**.
- Uncheck products in the **Product View** tab to exclude them from the tactic. Uncheck markets in the **Location View** tab to exclude them from a tactic.

		ACV Compliance	
1 ▲ Product Name		Effective	Low
<input checked="" type="checkbox"/>	BTL NAT VAL CLSTR GRN	88.08%	1.00%
<input checked="" type="checkbox"/>	00001600026357 NAT-VLY GR NT NT LVRS BG 1 OZ	100.00%	
<input checked="" type="checkbox"/>	00001600028916 NAT-VLY GR NT HR PNT BG 5 OZ	100.00%	
<input checked="" type="checkbox"/>	00001600028917 NAT-VLY GR NT NT LVRS BG 5 OZ	99.40%	2.00%
<input checked="" type="checkbox"/>	00001600028918 NAT-VLY GR NT RST AL BG 5 OZ	99.40%	2.00%
<input checked="" type="checkbox"/>	00001600028919 NAT-VLY GR NT R-CSW BG 5 OZ	5.80%	1.00%
<input checked="" type="checkbox"/>	00001600042274 NAT-VLY GR NT RST AL BG 16 ...	100.00%	
<input checked="" type="checkbox"/>	00001600050661 NAT-VLY GR NT NT LVRS BG 3.5...	100.00%	
<input checked="" type="checkbox"/>	00001600050662 NAT-VLY GR NT RST AL BG 3.5...	100.00%	

Note: You can also edit price and ACV versioning in the **Location View** tab. This allows you to enter different promoted prices or ACV levels in different locations. Change the price or percent off in the **Value** column to edit pricing

details. Change the value in the ACV column to edit ACV support.

Market Name	Market ID	Type	Value
▼ <input checked="" type="checkbox"/> CORP (X F4L/QFC)		Promoted Price	\$3.06
▼ <input checked="" type="checkbox"/> ATLANTA		Promoted Price	\$3.10
<input checked="" type="checkbox"/> ATLANTA CTA	KROAT.CTA	Promoted Price	\$3.10
▶ <input checked="" type="checkbox"/> CENTRAL		Promoted Price	\$3.20
▶ <input checked="" type="checkbox"/> CINCINNATI		Promoted Price	\$3.00
▶ <input checked="" type="checkbox"/> COLUMBUS		Promoted Price	\$3.00
▶ <input checked="" type="checkbox"/> DALLAS		Promoted Price	\$3.00

You can also plan using Base Support instead of ACV. Contact your IBM representative for more information.

4. Click **Update** to save without closing. Click **Done** to save and close the window.

Note: If you select the **List Price** or **Shelf Price** tactics, you can edit additional information regarding margin when editing the tactic. Click the **Additional Info** tab to enter additional information:

Note: You can also **Duplicate**, **Edit**, **Delete** or **Calculate** a tactic by right-clicking on it.

Adding Allowances to a Promotion

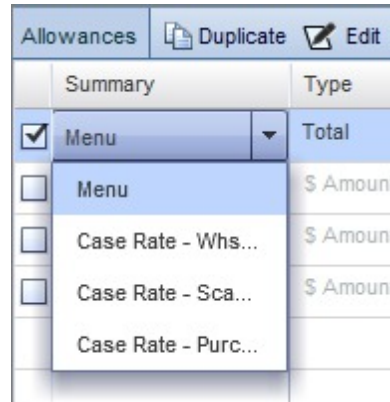
About this task

Because the **Allowances** window is seeded, you can view a promotion and add allowances at the same time.

To add an allowance to a promotion:

Procedure

1. Make sure the **Promotions** tab is selected.
2. Click the promotion you want to add an allowance to.
3. Click the **Allowances** tab.
4. Enable an allowance by clicking the checkbox next to it. After you have clicked the checkbox, you can also change the allowance from the **Summary** drop-down menu.



5. Select a **Type** from the drop-down menu.
6. Select from the **Value** drop-down menu. Enter a numerical value, if applicable.
7. Select a payment method from the **Payment** drop-down menu. For more information on the different payment methods, see Adding Allowances to a Promotion.
8. You can enter a number of weeks in the **Forward Buy Wk.** field if you want to include that information in your promotion. Forward buying is the purchase of an amount of product that exceeds immediate needs to take advantage of favorable pricing offered for promotions. In this field, you can enter a decimal or whole number indicating the number of weeks a retailer can participate in forward buying.

Note: The Forward Buy Wk. field is not displayed in the metric aggregations, but is displayed in the default planning view.

9. Enter a **Start** and **End** date. The default duration is 2 weeks. Enter a date range in the appropriate field, or click the calendar icon to select a date using the calendar widget. The total number of days and the date range selected is also displayed in this window. Click the **Day+** tab to specify a number of weeks after the start date. Click the **Quarter** tab to specify a number of quarters after the start date. Click the **Year** tab to specify a fiscal year.
10. Click **Ok**.

Note: If you enter a **Start** or **End** date outside the date range of the promotion, the date range of the promotion will be updated to match it.

11. Click **Save**.

Related Topics

“Editing Participation (Allowances)” on page 30

“Adding Tactics to a Promotion” on page 26

Editing Participation (Allowances)

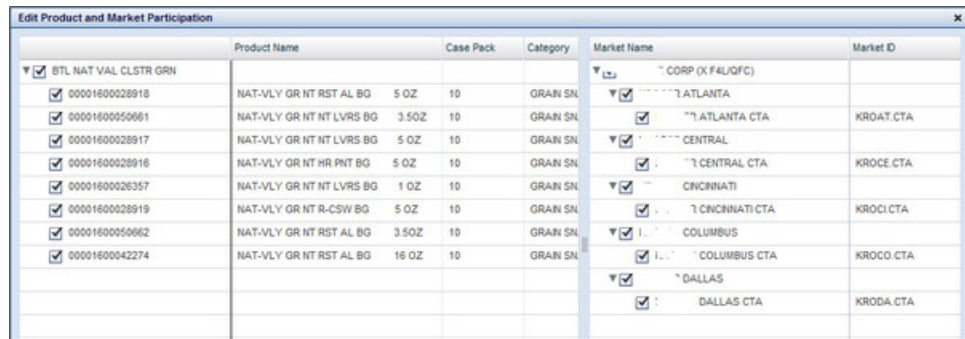
About this task

By default, the allowances you add to a promotion are applied to all products and markets originally added to that promotion. However, you can exclude markets or products from an allowance (edit participation).

To edit participation:

Procedure

1. Make sure the **Allowances** tab is open with the promotion you want to edit selected.
2. Click **Participation**.
3. Uncheck products to exclude them from the allowance. Uncheck markets to exclude them from the allowance.



Product Name	Case Pack	Category	Market Name	Market ID
<input checked="" type="checkbox"/> BTL NAT VAL CLSTR GRN			<input type="checkbox"/> CORP (X F&U/QFC)	
<input checked="" type="checkbox"/> 00001600028918	NAT-VLY GR NT RST AL BG 5 OZ 10	GRAIN SN	<input type="checkbox"/> ATLANTA	
<input checked="" type="checkbox"/> 00001600050661	NAT-VLY GR NT NT LVRS BG 3.5OZ 10	GRAIN SN	<input checked="" type="checkbox"/> ATLANTA CTA	KROAT.CTA
<input checked="" type="checkbox"/> 00001600028917	NAT-VLY GR NT NT LVRS BG 5 OZ 10	GRAIN SN	<input checked="" type="checkbox"/> CENTRAL	
<input checked="" type="checkbox"/> 00001600028916	NAT-VLY GR NT HR PNT BG 5 OZ 10	GRAIN SN	<input checked="" type="checkbox"/> CENTRAL CTA	KROCE.CTA
<input checked="" type="checkbox"/> 00001600026357	NAT-VLY GR NT NT LVRS BG 1 OZ 10	GRAIN SN	<input type="checkbox"/> CINCINNATI	
<input checked="" type="checkbox"/> 00001600028919	NAT-VLY GR NT R-CSW BG 5 OZ 10	GRAIN SN	<input checked="" type="checkbox"/> CINCINNATI CTA	KROCI.CTA
<input checked="" type="checkbox"/> 00001600050662	NAT-VLY GR NT RST AL BG 3.5OZ 10	GRAIN SN	<input type="checkbox"/> COLUMBUS	
<input checked="" type="checkbox"/> 00001600042274	NAT-VLY GR NT RST AL BG 16 OZ 10	GRAIN SN	<input checked="" type="checkbox"/> COLUMBUS CTA	KROCO.CTA
			<input checked="" type="checkbox"/> DALLAS	
			<input checked="" type="checkbox"/> DALLAS CTA	KRODA.CTA

4. Click **Ok**.

Note: You can also edit an individual allowance by right-clicking on it.

Predicting Promotions

About this task

After you have finished creating and editing a promotion, you can run a prediction. A prediction takes the fixed terms of the promotion and forecasts the results if the prediction were implemented. You can change the calculation context of a prediction by changing the prediction settings. For more information, see Changing Prediction Settings.

To predict a promotion:

Procedure

1. Make sure the **Promotions** tab is selected.
2. Click the promotion you want to predict. Be sure to save any changes you make to the promotion.

Note: You can select multiple promotions by holding the Shift or Ctrl key while you click. Use the Shift key to select multiple adjacent promotions, and the Ctrl key to select non-adjacent promotions.

3. Click **Predict**. The prediction status will automatically update once prediction is complete. You can view the status of your prediction in the **Prediction Status** column.

Note: The application will automatically remove inactive and/or discontinued products upon prediction.

You can also cancel the prediction process by clicking **Cancel**.

Removing Promotions

To remove a promotion from the **Promotions** grid, click the promotion, then click **Delete**. This will also remove the promotion from the **Summary** and **Plans** grids. You can select multiple promotions to delete by using the Shift and Ctrl keys.

Note: When you remove a promotion that is part of a predicted plan, the prediction status of the plan will change from **Predicted** to **Not Predicted**.

Duplicating Promotions

About this task

To duplicate a promotion, right-click the promotion, then select **Duplicate**.

You can change the name and date range of the copied promotion before you duplicate it in the **Duplicate Promotion Advanced Settings** window. From here, you can also elect to select a different retailer for the duplicate promotion.

To access the advanced settings:

Procedure

1. Right-click a promotion, hover over **Duplicate**, then click **Advanced Duplicate**.



The **Duplicate Promotion Advanced Settings** window will open:

2. Enter a new name and start date in the appropriate fields.
3. Select a new retailer from the **Retailer** drop-down, if desired.
4. Click **Ok**. The promotion will be copied according to the settings you selected.

Note: The PPG settings you applied to the original promotion will also apply to the copied promotion.

Comparing Promotions

About this task

You can view two or more promotions side by side in the **Summary** grid. This feature allows you to compare the total and baseline metrics of different promotions. You can compare each promotion side by side or compare the relative difference between a particular promotion and other promotions you select for comparison. You can also view planned or actual data.

Note: You can export your view in the Summary grid. You can also customize your view. For more information, see *Exporting Your View and Creating a Custom View*.

To compare promotions:

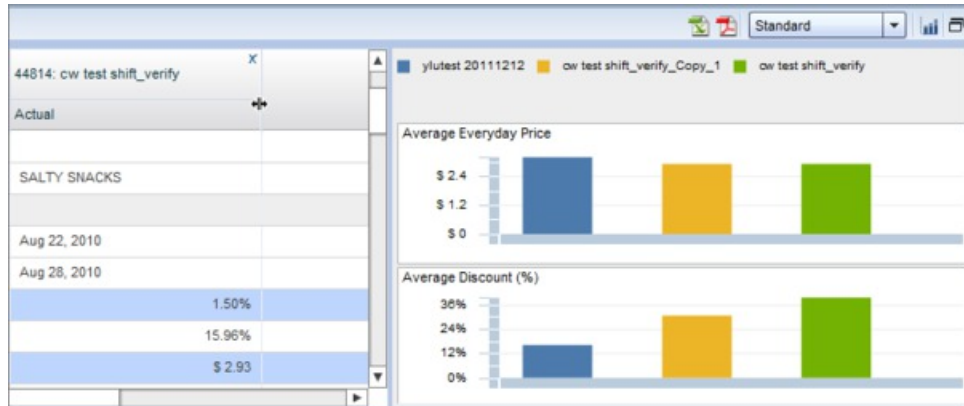
Procedure

1. Make sure the **Promotions** tab is selected.
2. Click the promotion you want to compare. You can select multiple promotions by holding the Shift or Ctrl key while you click. Use the Shift key to select multiple adjacent promotions, and the Ctrl key to select non-adjacent promotions.
3. Click **Compare**. You can also right-click and select **Compare**.
4. The default Summary view is the **Planned** view, which displays data based on your current promotion. If you have analyzed a promotion using the Event Review feature and you have the proper permissions enabled, you can view post-event data in the Summary grid by clicking **Actual**. For more information on this system setting, contact your IBM representative. To learn more about Event Review, see “Viewing Event Review” on page 38.

- In both the **Actual** and **Planned** views in the Summary grid, you can open a graph that compares metrics across promotions. You can select up to three metrics to display in the graph. To show or hide the graph, click the graph icon in the Summary grid:



The graph will display:



You can click on a metric in the **Metrics** section of the grid to display it in the graph. You can select up to three metrics. Hold down the Ctrl key while you click to select multiple metrics.

- For both **Planned** and **Actual** results, you can select **Promoted Product Results**, **Category Results**, or **Mfg. Category Results** from the drop-down menu to view different aggregations of the metrics.
- If you are viewing **Planned** results, you can select **Absolute** or **Relative** from the drop-down. Select **Absolute** to compare the individual metrics for each promotion side by side. Select **Relative** to compare the relative difference between a particular promotion and other promotions you select for comparison.

Note: If you select **Relative**, each promotion is compared to the first promotion you select for comparison, which is the left-most promotion in the **Summary** grid. This promotion is treated as a referent that all other promotions in the Summary grid are compared to. You can change the referent promotion by clicking and dragging a different promotion in the Summary grid to the left-most position.

Metrics	45449: echen promo		45443: echen PTC reg_override		
	Total		Total	% Chg.	Chg. T
▼ Execution					
Promotion Start Date		Jun 11, 2012			Jun 11, 2012
Promotion End Date		Jun 24, 2012			Jun 24, 2012
Average Discount (%)		8.69%			
Average Allowance (%)		0.00%	0.00%	0.00%	0.00%
Any Promo		22.32%	21.35%	-0.97%	-0.97%
TPR Only		18.60%	18.61%	0.21%	0.21%
Feature		3.10%	1.98%	-1.12%	-1.12%
Display		0.58%	0.45%	-0.13%	-0.13%
Feature And Display		0.04%	0.11%	0.07%	0.07%
Open PD2		0.00%	0.00%	0.00%	0.00%
Distribution		100.00%	100.00%	0.00%	0.00%

- Select the checkbox for **% Chg.** to view the difference as a percent and the **Chg.** checkbox to view the change in absolute numbers. You can also select the checkbox for **Baseline** to view baseline metrics.
- Collapse or expand a row of metrics by clicking the arrow icon to the right of the name of the metric.

You can remove promotions from the **Summary** grid. Click the x icon for the promotion you want to remove

You can also click **Remove All** to remove all promotions from the Summary grid.

Related Topics

“Viewing Event Review” on page 38

Viewing Results

About this task

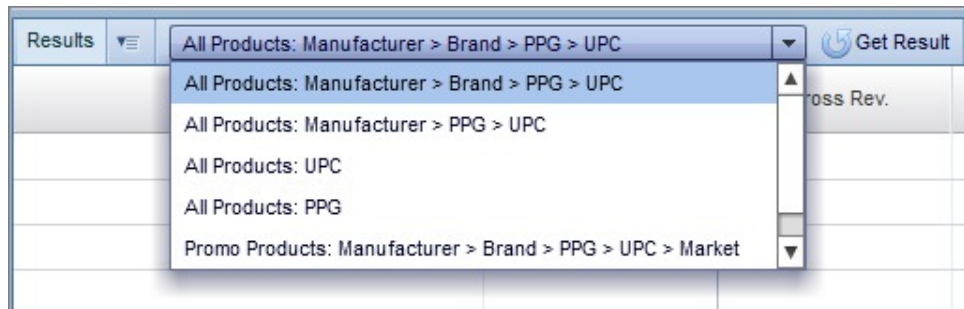
You can view SKU-level reporting and metrics aggregation for a promotion in the **Results** grid. You can also simulate a competitor’s promotional activity in this view.

Note: You can export your data in the Results grid. You can also customize your view. For more information, see *Exporting Your View* and *Creating a Custom View*.

To view Results:

Procedure

- Make sure the **Promotions** tab is selected.
- Click on a promotion.
- Click **Results**.
- Select a report from the drop-down menu.



Note: If you select a report labeled **All Products**, you can select the checkbox for **Competitor** to simulate a competitor’s promotional activity. This option is not available for reports labeled **Promo Products**, which only include data concerning promoted products.

5. Click **Get Result**.
6. Click the arrow to collapse or expand levels in the report, down to the SKU-level:

Results		All Products: Manufacturer > Brand > PPG > UPC		Get Result	<input type="checkbox"/> Competitor
	Product Name	Total Gross Rev.	Base Gross Rev.		
▼	KRAFT FOODS, INC.	\$483,144	\$47		
▶	PHILADELPHIA	\$316,759	\$30		
▶	PHILADELPHIA FLAVORS	\$71,232	\$7		
▼	PHILADELPHIA FREE	\$14,380	\$1		
▶	R33+8Z FAT FREE PHILLY BRICK CREAM	\$7,534	\$		
▶	R34+8Z FAT FREE PHILLY SOFT CREAM	\$6,846	\$		
▼	PHILADELPHIA LIGHT	\$80,451	\$8		
▶	GX5+8Z PHILLY SOFT CRM CHS 1/3LS F	\$42,909	\$4		
▼	R89+8Z REDUCED FAT PHILLY BRICK CF	\$37,542	\$3		
	00002100061247	PT PR NEUF LT ...	\$37,542	\$3	
▼	TEMPTEE	\$322			
▼	GX7+8Z WHIPPED CREAM CHEESE TEMP	\$322			
	00002100030028	TEMPTEE PR CR CH W...	\$322		

Viewing Analytics

The **Analytics** portion of the interface is comprised of two sections: the **Promotion History** tab and the **Post Event Analysis** tab. The **Promotion History** tab allows you to view historical data and charts for products-location combinations in your promotions. You can use the chart to easily identify high and low points in the sales history of a product-location. The **Post Event Analysis** tab (the Event Review feature) provides insight into the effectiveness of a promotion after you have executed it. You can see planned results and actuals side by side, and displays the difference as a bar graph for easier visualization.

Note: You can export your view in the Analytics grid. For more information, see [Exporting Your View](#).

Related Topics

“Viewing Promotion History”
“Viewing Event Review” on page 38

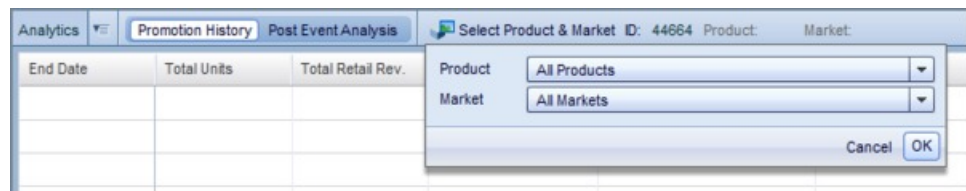
Viewing Promotion History

About this task

To view the promotion history of a promotion:

Procedure

1. Make sure the **Promotions** tab is selected.
2. Click on a promotion.
3. Click **Analytics**.
4. Click **Select Product & Market** to choose a product-market combination from your selected promotion.



5. Click **Ok**.

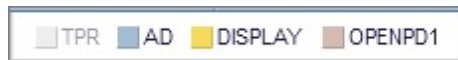
You can view historical revenue, volume, and price data for your selection as raw numbers (in ascending order) and as a graph:



You can shorten the time scale of the graph or “zoom in” by clicking and dragging the line in the bottom panel. You can also click and drag the bottom panel to move through the time frame.



You can click metric categories to show/hide them as stacked bars in the graph. If the selection is greyed out, it is not displayed in the graph:

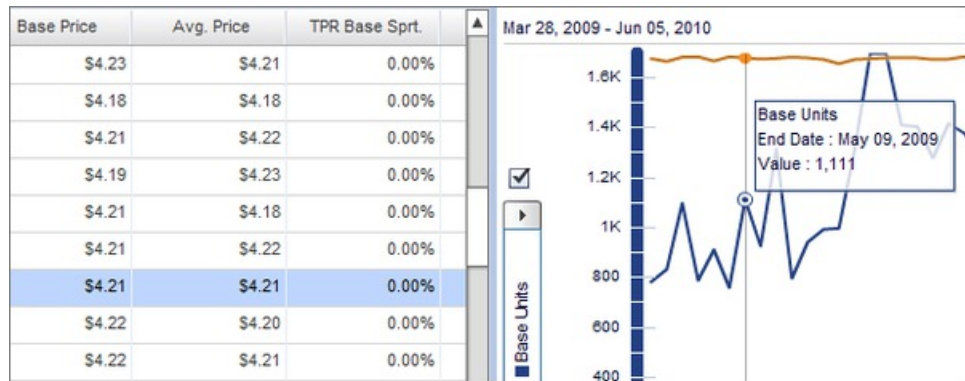


You can also select different aggregations for metrics using the drop-down menu. You can select **Avg. Price**, **Base Price**, **Base Units**, **Total Retail Rev.**, **Total Units** or **Unit Lift %**. The trend line in the graph will update according to your selection.



You can also mouse over points on the line in the graph to view the metrics associated with that data point.

The specific metrics associated with that point will also be highlighted in the table in the left-hand panel:



Viewing Event Review

About this task

To view post-event data (the Event Review feature) for a promotion:

Procedure

1. Make sure the **Promotions** tab is selected.
2. Click on a promotion. A promotion can be analyzed if it satisfies the following criteria:
 - The promotion has been predicted or calculated
 - Historical data is available for the entire duration of the promotion
3. Click **Analyze**. You can change the **In Store Dates** before analyzing the promotion in the **Post Event Advanced Settings** window.

You can access these settings by clicking the ... after **Analyze**.

Note: If the promotion has already been analyzed, you can skip these steps. A promotion has already been analyzed if there is a green check mark symbol in the Analysis Status column:

Analysis Status	Analysis Status	Analysis Status
✓	✓	✓
✗	✗	✗
✓	✗	✗
✗	✗	✗
✓	✓	✓
✓	✓	✓

- Once a promotion has been analyzed, click the promotion, then click **Analytics** to open the Analytics grid.
- Click **Post Event Analysis**, then select an option from the **Promoted Product Results** drop-down menu. You can select **Promoted Products Results**, **Mfg. Category Results**, or **Category Results**. You can also customize your view in the grid. For more information, see [Creating a Custom View](#)

The screenshot shows the Analytics grid interface. At the top, there are tabs for 'Promotion History' and 'Post Event Analysis'. A dropdown menu is open under 'Post Event Analysis', showing three options: 'Promoted Product Results', 'Mfg. Category Results' (which is highlighted), and 'Category Results'. The grid below has columns for 'Metrics', 'Planned', 'Actual', and 'Change'. The data rows include: Feature And Display (0.81% change), TPR Only (33.16% change), Feature (1.14% actual, 4.57% change), Display (1.13% actual, 2.11% change), Average Everyday Price (\$ 1.90 actual, \$ 1.90 change), Average Unit Price (\$ 1.88 actual, \$ 1.67 change), and Average Discount (%) (0.71% actual, 11.85% change). A 'Volume' section is partially visible at the bottom.

Note: If you select **Promoted Product Results** from the drop-down menu, you can click **Edit Trade Spend** to enter a trade spend value that will be used in the Event Review. If you do not enter a trade spend value yourself, an estimated trade spend will be used.

Note: You must have the Post Event Analysis permission enabled to use this feature. Contact your IBM representative for more information on enabling this permission.

Locking/Unlocking Promotions

You can disable editing for a promotion by locking it. Other users will not be able to edit the promotion unless they have proper permissions enabled. Contact your IBM representative for more information about enabling this permission.

To lock a promotion, click the promotion you want to lock, then click the appropriate cell in the **Lock Status** column.

	Name	ID	Run ID	Description	Code
	cw test quick test	44672			
	cw quick test	44671			
	New Promotion	44670			
	xsu for bug 74850	44669			

The lock icon will appear adjacent to the locked promotion. Click the icon again to clear it and unlock the promotion. If the icon is greyed out, you do not have proper permissions enabled to unlock or lock the promotion. For more information on different lock icons, see [Icons](#). For more information on enabling the proper permissions, contact your IBM representative.

Note: If a locked promotion belongs to multiple locked plans, you will need to unlock all associated plans in order to unlock the promotion. If a locked promotion belongs to a locked plan, the **Locked in Plans** icon will appear. For more information on this icon and unlocking plans, please see [Icons](#), “Adding Promotions to a Plan” on page 25 and [Locking/Unlocking Plans](#). You will need permissions enabled to unlock promotions and plans that have been locked. Contact your IBM representative for more information on enabling this permission.

Related Topics

“Adding Promotions to a Plan” on page 25

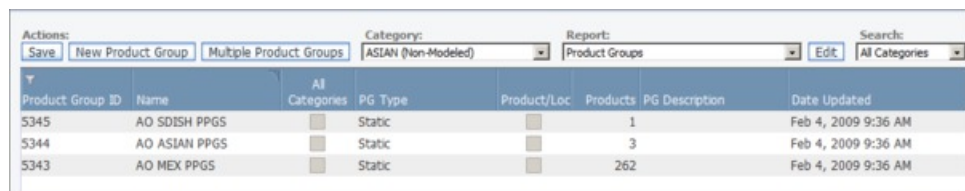
Creating Static Product Groups

About this task

To create a static product group:

Procedure

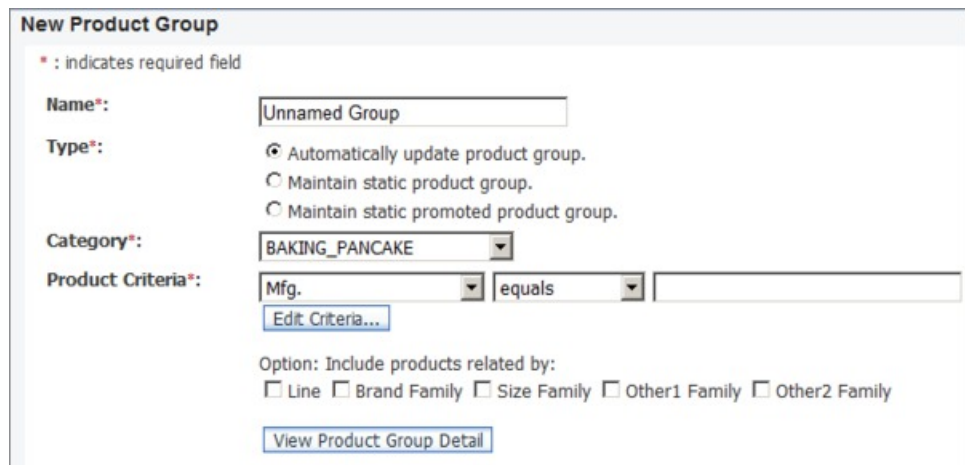
1. Select **Data > Product Groups**. The **Product Groups** page shows (for a specified category) any product groups, number of members in each group, last date updated, and the user who made the update.



Product Group ID	Name	All Categories	PG Type	Product/Loc	Products	PG Description	Date Updated
5345	AO SDISH PPGS	<input type="checkbox"/>	Static	<input type="checkbox"/>	1		Feb 4, 2009 9:36 AM
5344	AO ASIAN PPGS	<input type="checkbox"/>	Static	<input type="checkbox"/>	3		Feb 4, 2009 9:36 AM
5343	AO MEX PPGS	<input type="checkbox"/>	Static	<input type="checkbox"/>	262		Feb 4, 2009 9:36 AM

Note: From this screen, you can right-click a Product Group to **Edit**, **View Details**, **Delete** or **Export Table**.

2. Click **New Product Group** to create a new product group. The **New Product Group** page opens.



New Product Group

* : indicates required field

Name*:

Type*: Automatically update product group.
 Maintain static product group.
 Maintain static promoted product group.

Category*:

Product Criteria*: equals

[Edit Criteria...](#)

Option: Include products related by:
 Line Brand Family Size Family Other1 Family Other2 Family

[View Product Group Detail](#)

3. Enter a name for the group in the **Name** field. Use a unique name that is easily identifiable and does not exceed 50 characters.
4. Select an applicable **Type**.
5. Choose a product category from the **Category** drop-down menu.
6. Select **Product Criteria** for your static product group.
7. Click **View Product Group Detail** to preview the product group you have created.
8. Click **Add Next Product Group** to create an additional product group, or click **Done** to finish.

Chapter 4. Working With Plans

Plans allow you to group promotions for one category over a specified date range. You can add multiple promotions to a plan as long as the date range, category and retailer assigned to the promotion and the plan coincide.

Note: You can also perform some of the actions described below on an individual plan by right-clicking on it.

Related Topics

“Creating a New Plan”

“Adding Promotions to a Plan” on page 42

“Editing Funding Details” on page 43

“Predicting Plans” on page 44

“Locking/Unlocking Plans” on page 45

“Comparing Plans” on page 46

“Viewing Results” on page 47

“Viewing the Promotion Calendar” on page 48

“Viewing the Planning Report” on page 50

“Validating Plans” on page 52

“Viewing Plan Details” on page 54

Creating a New Plan

About this task

A plan allows you to organize promotions for a category in a single group, forecast promotion performance, and ultimately, decide which promotions to implement.

Note: You can export your data in the **Plans** grid. You can also customize your view. For more information, see “Exporting Your View” on page 12 and “Creating a Custom View” on page 14

To create a new plan:

Procedure

1. Make sure the **Plans** tab is selected.
2. Click **New Plan** to create a new row in the Plans grid.
3. Enter a **Name** and **Description** in the appropriate field
4. Select a **Retailer** and **Category** from their respective drop-down menus.
5. Enter a **Start** and **End** date. Enter a date range in the appropriate field, or click the calendar icon to select a date using the calendar widget. The total number of days and the date range selected is also displayed in this window. Click the **Week** tab to specify a number of weeks after the start date. Click the **Quarter** tab to specify a number of quarters after the start date. Click the **Year** tab to specify a fiscal year.

Note: When you select a week, it must align with the fiscal calendar week.

6. Click **Ok**.
7. Enter a value in the **Accrual Rate** and **Fixed Funding** fields, if applicable.
8. Select a **Workflow Status** from the drop-down menu. You can select **Draft**, **Complete** or **Approved**.

Note: Once you set the Workflow Status of a plan to Approved, the plan and associated promotions are locked for editing. For more information, see “Locking/Unlocking Plans” on page 45. To edit the Workflow Status of a plan, the proper permissions must be enabled. Contact your IBM representative for more information. If the Workflow Status is **Submitted**, the approved plan has been submitted to the Corporate View and you can view it in the **Planning Report**. See “Viewing the Planning Report” on page 50 for more information.

9. Click **Save**.

Related Topics

“Adding Promotions to a Plan”

“Editing Funding Details” on page 43

“Predicting Plans” on page 44

“Locking/Unlocking Plans” on page 45

“Viewing the Planning Report” on page 50

Adding Promotions to a Plan

About this task

In order to add a promotion to a plan, the promotional details must coincide with the plan. The possible promotions you can add to a plan are constrained by the date range, category and retailer assigned to the plan.

To add promotions to a plan:

Procedure

1. Make sure the **Plans** tab is selected.
2. Click the plan you want to add promotions to.
3. Click **Add Promotions** in the **Plans** grid.
4. Click the checkbox corresponding to the promotion you want to add to the plan.

Add Promotions					
Select promotions to add					
		Name	ID	Run ID	Description
<input type="checkbox"/>		SN Yogurt_Copy_3	45216		
<input type="checkbox"/>		SN Yogurt_Copy_2	45215		
<input type="checkbox"/>		SN Yogurt_Copy_1	45214		
<input type="checkbox"/>		SN Yogurt_Copy_1	45213		
<input checked="" type="checkbox"/>		SN Yogurt	45211		
<input type="checkbox"/>		echen EDLP only	44767	34585	BUILD_12_3_0_0_B019
<input type="checkbox"/>		echen TPR only	44766	34584	BUILD_12_3_0_0_B019
<input type="checkbox"/>		TPO - 12.1 Perf Yop FP EDLP \$4.99 ...	44271	34240	TPO - 12.1 Perf case 1 - F...
<input type="checkbox"/>		AW TPR 1 100% support_Copy_2	44133		
<input type="checkbox"/>		AW 10% EDLP_Copy_2	44132		

5. Click **Ok**.

Note: When you edit a promotion in the **Promotions** grid after you have added it to a plan, the promotion in the **Plans** grid will be updated as well. However, if you edit the date range of a promotion so it is outside the date range of the plan, that promotion will not be included in the plan prediction. If you edit the **Retailer** or **Category** of a promotion so it no longer coincides with the plan, the plan prediction will result in an error.

Editing Funding Details

About this task

By default, the accrual rate you enter for a plan in the **Plans** grid is applied to all promoted product groups (PPG) within the plan. You can change the accrual rates applied to promoted product groups in the plan by editing funding details. You can also make fixed funding adjustments for specific line items.

To edit funding details for a plan:

Procedure

1. Make sure the **Plans** tab is selected.
2. Click on a plan.
3. Click **Edit Funding**.
4. You can change the accrual rates at the PPG level in the **Accrual Rate** tab. Click the arrow icon to collapse or expand sub-groups from all brands down to the PPG level.
Then, click a cell in the **Override** column to enter a new accrual rate at the brand or PPG level. The values in the **Effective** column will update accordingly.
5. You can change **Shipment Conversion %** or make specific revenue adjustments to line items in the **Additional Adjustments** tab.

Edit Funding Details	
Additional Adjustments	
Shipment Conversion %	100.00%
Fixed Funding	\$ 0
Line Item # 8	\$ 0
Line Item # 7	\$ 0
Line Item # 6	\$ 0
Line Item # 5	\$ 0
Line Item # 4	\$ 0
Line Item # 3	\$ 0
Line Item # 2	\$ 0
Line Item # 1	\$ 0

To make a line item adjustment, simply click the applicable **Fixed Funding** or **Revenue Adjustment** line item field. To change shipment conversion, click the **Shipment Conversion %** field and enter a new value.

6. Click **Update** to save without closing, and **Done** to save and close the window.

Predicting Plans

About this task

When you have finished creating and editing a plan, you can run a prediction. A prediction takes the terms of the plan, including the promotions, and forecasts the results as if the plan were implemented. You can change the calculation context of a prediction by changing the prediction settings. For more information, see “Changing Prediction Settings” on page 71.

To predict a plan:

Procedure

1. Make sure the **Plans** tab is selected.
2. Click the plan you want to predict. Be sure to save any changes you make to the plan.

Note: You can select multiple plans by holding the Shift or Ctrl key while you click. Use the Shift key to select multiple adjacent plans, and the Ctrl key to select non-adjacent plans.

3. Click **Predict**. The prediction status will automatically update once prediction is complete. You can view the status of your prediction in the **Prediction Status** column.

Note: When the status of a plan is **Predicting**, you cannot add promotions to the plan. However, once prediction has completed, you can add promotions to the plan by unlocking the plan, adding the promotion and re-predicting.

You can also cancel the prediction process by clicking **Cancel**.

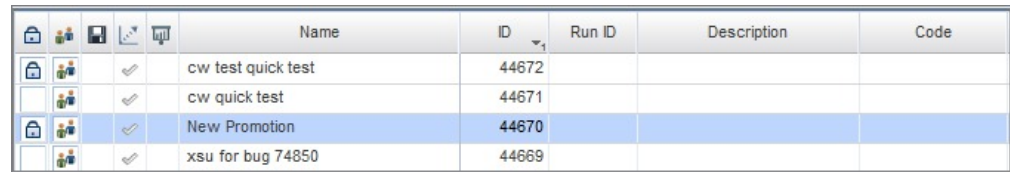
Removing Plans

To remove a plan, click the plan, then click **Delete**. You can select multiple plans to delete by using the Shift and Ctrl keys.

Locking/Unlocking Plans

You can disable editing for a plan by locking it. Other users will not be able to add promotions, edit plan funding, delete or predict a plan once it is locked unless they have the proper permissions enabled. Additionally, you will not be able to delete, predict, cancel or add products and markets to promotions within locked plans.

To lock a plan, click the plan you want to lock, then click the appropriate cell in the **Lock Status** column. The lock icon will appear adjacent to the locked plan. Click the icon again to clear it and unlock the plan. If the icon is greyed out, you do not have proper permissions enabled to unlock or lock the plan.



The screenshot shows a table with columns: Name, ID, Run ID, Description, and Code. There are four rows of data. Each row has a lock icon in the first column and a checkmark in the second column. The third row, 'New Promotion' with ID 44670, is highlighted in blue.

	Name	ID	Run ID	Description	Code
	cw test quick test	44672			
	cw quick test	44671			
	New Promotion	44670			
	xsu for bug 74850	44669			

For more information on different lock icons, see “Icons” on page 10. For more information on enabling the proper permissions, contact your IBM representative.

Duplicating Plans

About this task

To duplicate a plan, click the plan, then click **Duplicate**.

You can change the name, date range and retailer of the copied plan before you duplicate it in the **Duplicate Plan Advanced Settings** window. From here, you can also elect to duplicate all promotions contained in the plan.

To access the advanced settings:

Procedure

1. Click the ... after the **Duplicate** button.
2. The **Duplicate Plan Advanced Settings** window will open.

Enter a new name and date range in the appropriate fields. Click the **Week**, **Quarter**, or **Year** tab for advanced date range options. Select a new **Retailer** from the drop-down menu, if applicable.

3. Select the checkbox for **Duplicate all promotions in this plan**, if desired. You should select this checkbox if you are changing the date range of the plan you are copying.
4. Click **Ok**. The plan will be copied according to the settings you selected.

Note: The PPG settings you applied to the original plan will also apply to the copied plan.

Comparing Plans

About this task

You can view two or more plans side by side in the **Summary** grid. This feature allows you to compare the total and baseline metrics of different plans. You can compare each plan side by side or compare the relative difference between a particular plan and other plans you select for comparison.

Note: You can export your data in the Summary grid. You can also customize your view. For more information, see “Exporting Your View” on page 12 and “Creating a Custom View” on page 14.

To compare plans:

Procedure

1. Make sure the **Plans** tab is selected.
2. Click the plan you want to compare. You can select multiple plans by holding the Shift or Ctrl key while you click. Use the Shift key to select multiple adjacent plans, and the Ctrl key to select non-adjacent plans.
3. Click **Compare**. You can also right-click your selection and click **Compare**.

- Select **Absolute** or **Relative** from the drop-down. Select **Absolute** to compare the individual metrics for each plan side by side. Select **Relative** to compare the relative difference between a particular plan and other plans you select for comparison.

Note: In the Relative view, each plan is compared to the first plan you select for comparison, which is the left-most plan in the **Summary** grid. This plan is treated as a referent that all other plans in the Summary grid are compared to. You can change the referent plan by clicking and dragging a different plan in the Summary grid to the left-most position.

Metrics	8022: PT Plan2C us34523 Tst2c X		8020: PT Plan2A us34523 Tst2a X		
	Total		Total	% Chg.	Chg.
Workflow Status		Draft			Draft
Prediction Context		Last Year			Last Year incl. EDLP
Execution					
Plan Start Date		Nov 25, 2012			Dec 16, 2012
Plan End Date		Dec 15, 2012			Feb 23, 2013
Average Price		\$1.78	\$1.71	-4.03%	(\$0.07)
Promoted Price		\$2.26	\$2.59	14.50%	\$0.33
Non-Promoted Price		\$1.71	\$1.68	-1.82%	(\$0.03)
Average Discount (%)		-32.53%	-54.60%	-22.07%	-22.07%
Average Allowance (%)		0.45%	0.50%	0.05%	0.05%
Volume					
Total Unit Volume		1,094,338	3,799,675	247.21%	2,705,337
Unit Volume Lift (%)		3.97%	1.16%	-2.81%	-2.81%

- You can select the checkbox for **Baseline** to view baseline metrics. You can also select the **Combined Results** checkbox to view the aggregated metrics for each plan you selected for comparison.
- Select **Promoted Product Results**, **Manufacturer Category Results**, or **Category Results** from the drop-down menu.
- Collapse or expand a row of metrics by clicking the arrow icon to the right of the name of the metric.
You can remove a plan from the **Summary** grid. Click the x icon for the plan you want to remove.
You can also click **Remove All** to remove all plans from the Summary grid.

Viewing Results

About this task

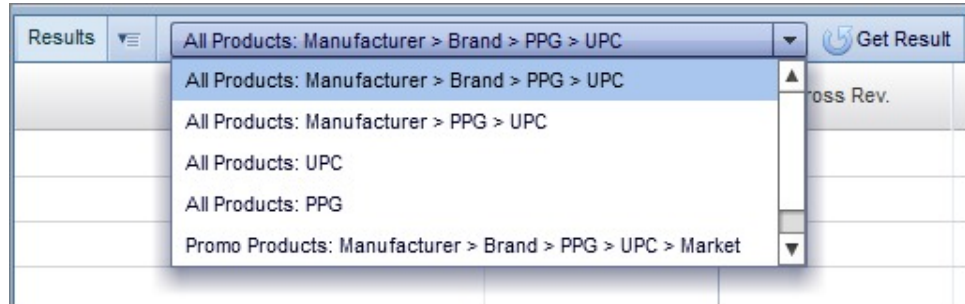
You can view SKU-level reporting and metrics aggregation for a plan in the **Results** grid. You can also simulate a competitor's promotional activity in this view.

Note: You can export your data in the Results grid. You can also customize your view. For more information, see "Exporting Your View" on page 12 and "Creating a Custom View" on page 14.

To view Results:

Procedure

1. Make sure the **Plans** tab is selected.
2. Click on a plan.
3. Click **Results**.
4. Select a report from the drop-down menu.



Note: If you select a report labeled **All Products**, you can select the checkbox for **Competitor** to simulate a competitor's promotional activity. This option is not available for reports labeled **Promo Products**, which only include data concerning promoted products.

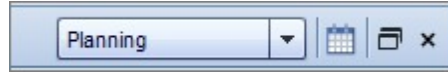
5. Click **Get Result**.
6. Click the arrow to collapse or expand levels in the report, down to the SKU-level:

Results	All Products: Manufacturer > Brand > PPG > UPC	Get Result	Competitor
	Product Name	Total Gross Rev.	Base Gross Rev.
▼	KRAFT FOODS, INC.	\$2,921,656	\$2,911,83
▶	PHILADELPHIA	\$1,883,414	\$1,872,51
▼	PHILADELPHIA FLAVORS	\$461,567	\$461,54
▶	R91+8Z PHILLY SOFT CREAM CHEESE D	\$445,128	\$445,11
▼	S02+8Z SALMON PHILLY SOFT CREAM I	\$16,440	\$16,44
	00002100061427	\$16,440	\$16,44
▼	PHILADELPHIA FREE	\$89,421	\$89,84
▶	R33+8Z FAT FREE PHILLY BRICK CREAM	\$42,859	\$42,84
▼	R34+8Z FAT FREE PHILLY SOFT CREAM	\$46,563	\$47,01
	00002100000154	\$46,562	\$47,01
	00002100061209	\$0	\$0
▶	PHILADELPHIA LIGHT	\$485,239	\$485,84
▶	TEMPTEE	\$2,014	\$2,01

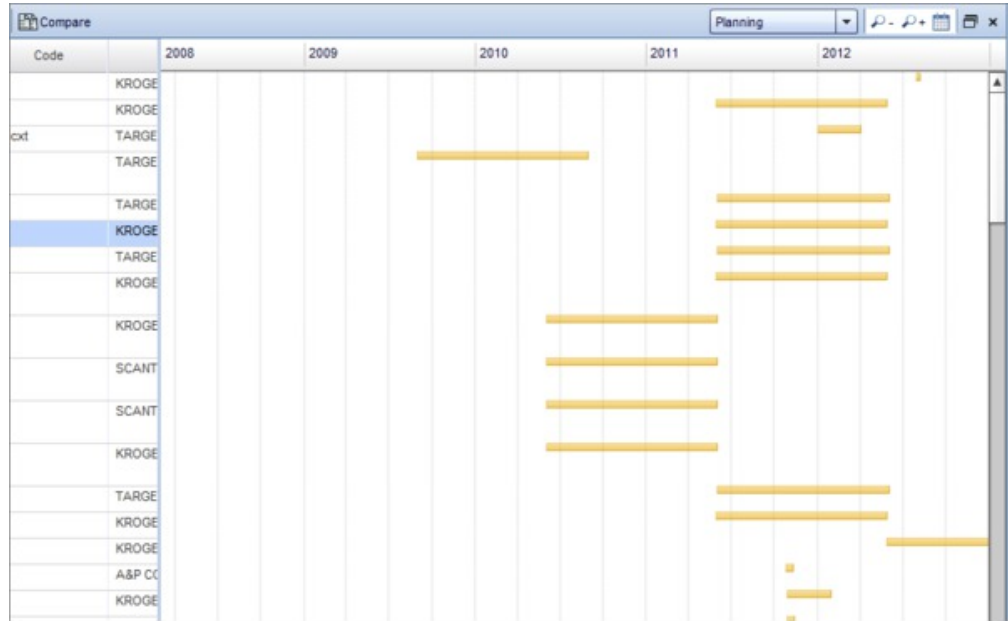
Viewing the Promotion Calendar

You can view a Gantt chart that displays the schedule for your plans and the promotions associated with them. This view is called the **Promotion Calendar**.

To show or hide the Promotion Calendar, click the calendar icon in the upper right-hand side of the **Plans** grid:



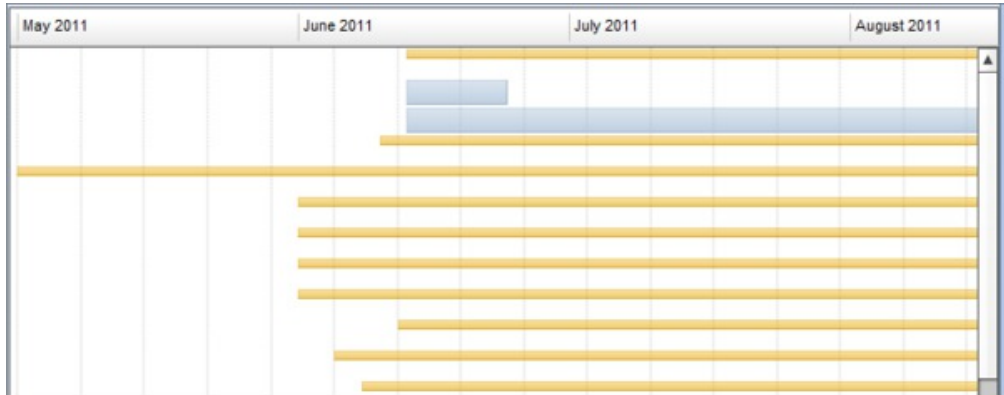
The calendar will open in the grid:



Each orange bar corresponds with a category plan. If you select a plan in the **Plans** grid, the calendar will display the date range associated with that plan. You can collapse and expand a plan in the grid to view the promotions associated with it by clicking the arrow next to the plan name:

Name	ID	Run ID	Description	Code
▼ TPO - 11.2 Perf baseline big category_fullpredict	7652	10992	TPO - 11.2 Perf baseline bi...	
📄 TPO - 11.2 Perf Yop FP EDLP \$4.99 big...	44069	-	TPO - 11.2 Perf case 1 - F...	TPA-MG
📄 TPO - 11.2 Perf Yop FP big category \$...	44070	-	TPO - 11.2 Perf case 2 - F1...	TPA-MG
📄 TPO - 11.2 Perf Yop FP big category \$...	44075	-	TPO - 11.2 Perf case 7 - F1...	TPA-MG
📄 TPO - 11.2 Perf Yop FP big category \$...	44072	-	TPO - 11.2 Perf case 4 - F1...	TPA-MG
📄 TPO - 11.2 Perf Yop FP big category \$...	44071	-	TPO - 11.2 Perf case 3 - F1...	TPA-MG
📄 TPO - 11.2 Perf Yop FP big category \$...	44074	-	TPO - 11.2 Perf case 6 - F1...	TPA-MG
📄 TPO - 11.2 Perf Yop FP big category \$...	44073	-	TPO - 11.2 Perf case 5 - F1...	TPA-MG
▶ TPO - 11.2 Perf small category_fullpredict	7651	10991	LY context	

The corresponding promotions will appear as blue bars:



Viewing the Planning Report

About this task

You can view approved plans for categories and retailers you select, rather than viewing them individually. This view is called the Corporate View, which you can currently access in the **Planning Report**.

To view the Planning Report:

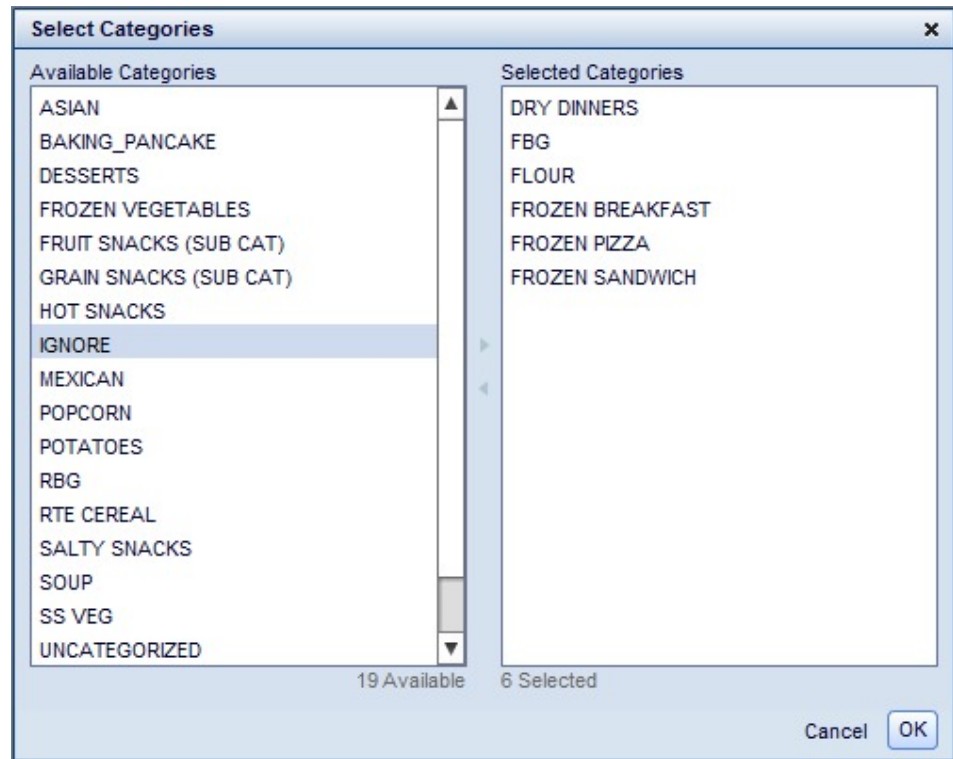
Procedure

1. Click the **Reporting** tab in the upper left-hand side of the interface:



2. Select a category by clicking the **Categories** field or the icon next to it:

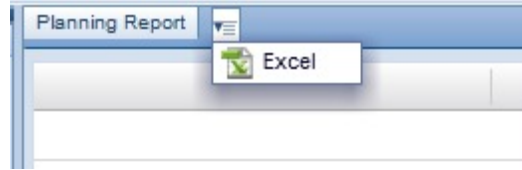
3. This will open the following window:



4. Select a category by clicking on a category name in the **Available Categories** list. You can click multiple categories by using the Shift or Ctrl keys. Use the Shift key to select multiple adjacent categories and the Ctrl key to select non-adjacent categories.
5. Click the arrow icon (>) to add categories from the Available Categories list to the **Selected Categories** list.
6. Click **Ok**.
7. Select a retailer using the same method you used to select a category.
8. Select a date range.
9. Select an option from the **Report Layout** drop-down.
10. Click **Run**.
11. Click the arrow icons to collapse or expand levels of the report.

Planning Report			
	Product Name	Total Units	Base Units
▼	CREAM CHEESE	1,911,556	1,894,703
▼	T	1,911,556	1,894,703
▶	SOFT CREAM CHEESE	47,539	38,837
▼	833+12Z WHIPPED CREAM CHEESE 12CT	19,872	17,513
	00002100060085 PHL PR CR CH WHP	19,872	17,513
▶	SOFT CREAM CHEESE	15,600	15,382
▶	SOFT CREAM CHEESE 4	45,256	44,807
▶	CRM CHS 1/3LS	20,383	18,153

You can also export the Corporate View by clicking the drop down menu to the right of the **Planning Report** name:



Validating Plans

About this task

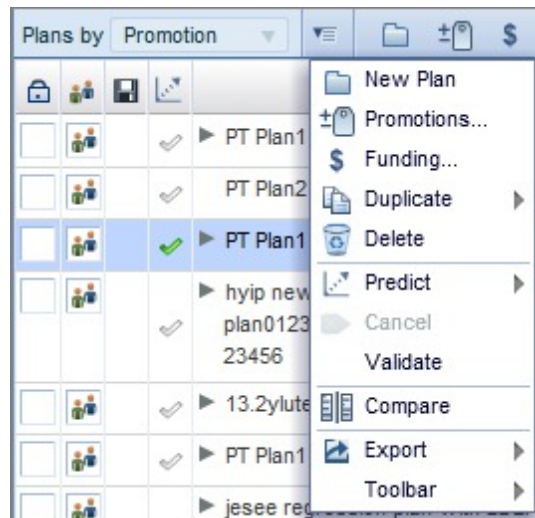
Validating plans allows you to set up relevant business rules and verify that a plan adheres to them. Rules are customizable—for instance, you can enforce the rule that plans must have shipment start and end dates in order to be validated. You can also configure whether validation is triggered automatically at certain times—when you change the **Workflow Status** of a plan to **Approved**, for instance.

Note: Validation is only available if you have the proper system settings enabled. Contact your IBM representative for more information.

To validate a plan:

Procedure

1. Click on a plan in the **Plans** grid you want to validate.
2. Access the drop-down menu and select **Validate**:



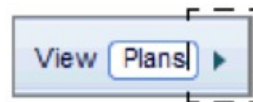
3. If the plan validates successfully, a green checkmark will appear in the **Validation** column. If the plan contains validation errors, a red exclamation mark will appear in the column instead. If you have not validated the plan, the field will remain blank:

Validation
✓
✓
✓
!

You can also view which specific promotions in the plan did not pass validation.

Note: The Validation column is only visible if you have selected it as a column you want displayed in the Plans grid. For more information on how to hide or display specific columns, see “Creating a Custom View” on page 14.

4. If the plan was not validated, you can view why by accessing the **Plan Details**. To view Plan Details, select a plan in the Plans grid, then click the > arrow next to **Plans**.



You can also double-click a plan you would like to analyze (make sure to click a non-editable field). If a plan was not validated successfully, a side-panel detailing the validation errors will open in the Plan Details grid.

Validation

! Error(s) Found Validate

Mar 25, 2013 02:43 PM

▼ 13.2ylutest-Scenario 16:

Tactic/Allowances have different product/locations

▼ 13.2ylutest-Scenario 16:

_Copy_1_Copy_1

Tactic/Allowances have different product/locations

After resolving the errors in the promotions, you can click **Validate** again directly from this side-panel. For more information about the Plan Details grid, see “Viewing Plan Details” on page 54.

Note: You can only validate one plan at a time. You can not validate a plan if it is locked, contains no promotions, has not been saved, or contains promotions that have not been saved.

Related Topics

“Viewing Plan Details” on page 54

Viewing Plan Details

About this task

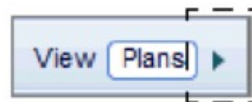
The **Plan Details** grid allows you to double-click a plan to see information displayed as a Gantt chart for that particular plan. You can view brands, TV activity, distribution changes, base plan overrides, and coupon drops. You can also select PPGs you want to promote and create a new promotion.

Note: The Plan Details grid is only accessible if you have the proper system setting enabled. Contact your IBM representative for more information.

To view Plan Details:

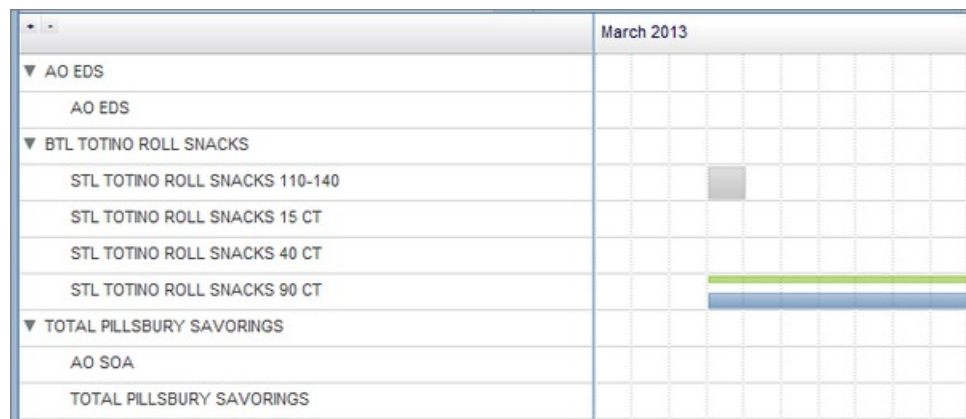
Procedure

1. Select a plan in the Plans grid. Click the > arrow next to **Plans**.

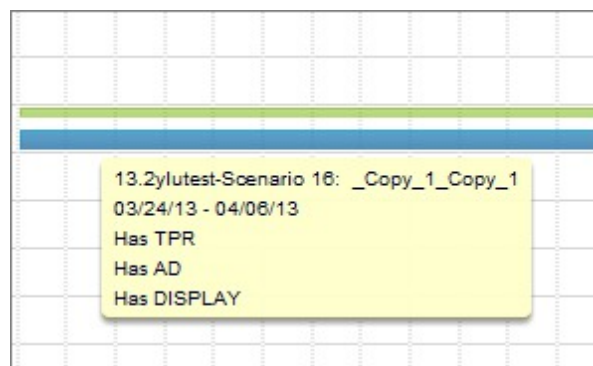


You can also double-click a plan you would like to analyze (make sure to click a non-editable field).

2. Click the + sign to expand all PPGs and the – sign to collapse them, or click an individual brand name to expand PPGs for that particular brand. This opens up a Gantt chart that displays when the corresponding PPG is being promoted.



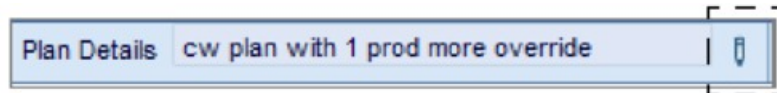
If point to the chart, you can view more information about the promotion, including associated tactics.



You can also click and drag the Gantt chart to change the dates for a promotion and right-click the Gantt chart to access a menu of options:



3. You can edit plan details by clicking the edit icon.



When you hover over the edit icon, you can view the plan details. You can edit the **Name**, **Description**, **Code**, **Date Range**, or **Workflow Status**. If you have the proper permissions enabled, you can edit the **Lock Status**. See “Locking/Unlocking Promotions” on page 39 for more details.

Name *	13.2ylutest_Scenario 16_Copy_1
Description	
Code	
Date Range:	Week Quarter Year
	Mar 24, 2013 - May 18, 2013
	8 week(s)
Retailer	TARGET
Category	HOT SNACKS
Prediction Status	✔ Predicted
Workflow Status	Draft
Validation Status	Not validated
Lock Status	<input type="checkbox"/> Unlocked
Visibility Status	Public

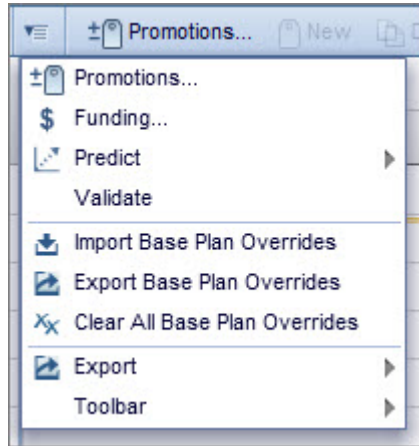
4. You can also add or remove promotions from the plan. Click **Promotions**. You can add or remove a promotion by clicking to check or clear the checkbox next to it.

Add Promotions						
Select promotions to add						
			Name	ID	Run ID	Description
<input type="checkbox"/>		✓	13.2ylutest-84726	44784		
<input checked="" type="checkbox"/>		✓	New Promotion	44777		
<input checked="" type="checkbox"/>		✓	13.2ylutest-Scenario 16: _Copy_1_...	44763		
<input type="checkbox"/>		✓	13.2ylutest-Scenario 16: _Copy_1	44762		
<input checked="" type="checkbox"/>		✓	13.2ylutest-Scenario 16:	44761		

5. You can also edit accrual funding for the plan. Click **Funding**. You can then click to edit/enter values in the **Accrual Rate** or **Additional Adjustments** fields.

Edit Funding Details			
Accrual Rate		Additional Adjustments	
Number of Overrides: 0			
			Override
▼ Total			\$0.00
▼ AO EDS			\$0.00
AO EDS			\$0.00
▼ BTL TOTINO ROLL SNACKS			\$0.00
STL TOTINO ROLL SNACKS 15 CT			\$0.00
STL TOTINO ROLL SNACKS 90 CT			\$0.00
STL TOTINO ROLL SNACKS 40 CT			\$0.00
STL TOTINO ROLL SNACKS 110-140			\$0.00
▼ TOTAL PILLSBURY SAVORINGS			\$0.00
TOTAL PILLSBURY SAVORINGS			\$0.00
AO SOA			\$0.00

6. You can also **Predict** the plan.
 7. Most of the options described above are also accessible from a drop-down menu:

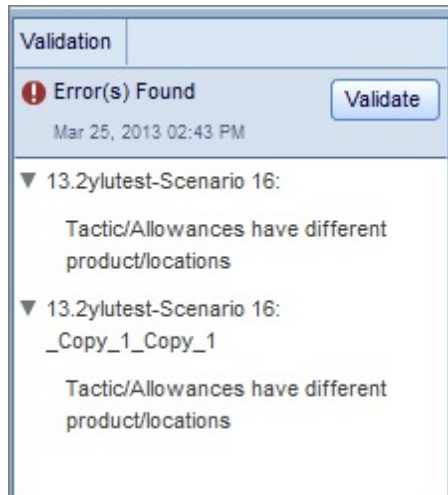


Other options are also available in this menu, including **Export**, **Import Base Plan Overrides**, **Export Base Plan Overrides**, **Clear All Base Plan Overrides** and **Validate**. For more information on validation, see “Validating Plans” on page 52.

8. You can also open other grids while viewing Plan Details. This allows you to view plan or promotion metrics in the **Summary**, **Tactics**, **Allowances**, **Analytics**, or **Results** grids simultaneously. You can also only view the **Base** grid from the Plan Details view. See “Viewing the Base Grid” on page 58 for more information.

Note: If you open the **Analytics** grid, you can use the Shift and Ctrl keys to select multiple PPGs in the Plan Details grid and view the Promotion History for them in the Analytics grid.

9. If the plan you are viewing was not validated successfully, a side-panel may open up that specifies the validation errors in each promotion.



After resolving the errors in the promotions, you can click **Validate** again directly from this side-panel. For more information about validating plans, see “Validating Plans” on page 52.

Related Topics

“Validating Plans” on page 52

“Viewing the Base Grid” on page 58

Viewing the Base Grid

About this task

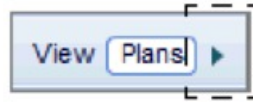
The **Base** grid allows you to plan absolute shelf price, distribution ACV and base volume overrides. You can enter these overrides at the UPC-Retailer or UPC-Market level for each fiscal week.

Note: The Base grid is only accessible if you have the proper system settings enabled. Contact your IBM representative for more information.

To view the Base grid:

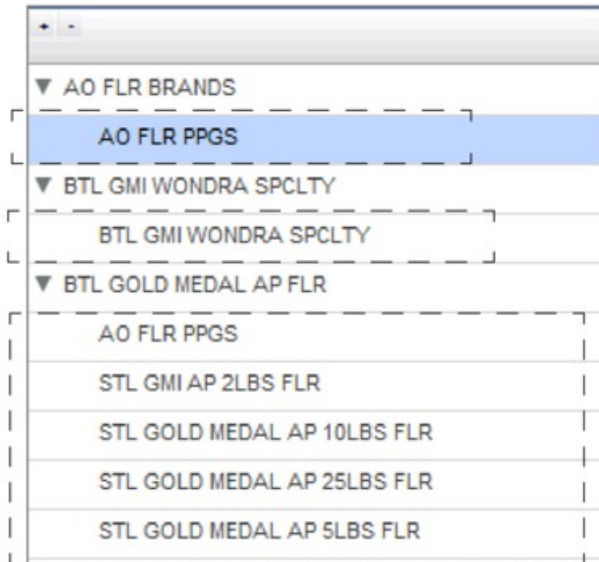
Procedure

1. Access the **Plan Details** grid by selecting a plan in the Plans grid. Click the > arrow next to **Plans**.



You can also double-click a plan you would like to analyze (make sure to click a non-editable field).

2. Click to select a PPG in the grid. PPGs are nested in the Plan Details hierarchy:



Double-click a PPG to open the Base grid, or click **Base** in the navigation bar

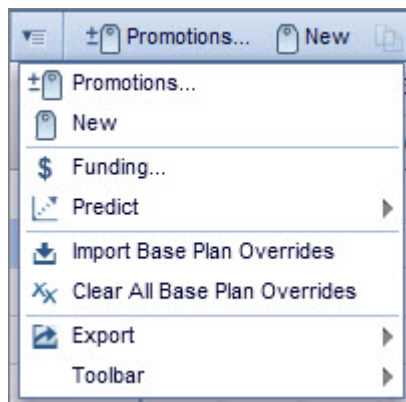


: Base overrides at the UPC level will be displayed in the grid for that specific PPG. If you have not entered any overrides, the fields will be blank.

Base Overrides: AO FLR PPGS		All Markets		
UPC	Name	Tactics	May 18, 2013	
00001600011710	GM WH WT FLR BL SR BG AP 2 POUND	Distribution (%)		
		Shelf Price (\$)		
		Base Volume		
00001610011148	HN GRN WHL WHT FLR S-G AP 5 POUND	Distribution (%)		
		Shelf Price (\$)		
		Base Volume		
00001610011160	HGN WH WT FLR UB H-AL BG AP 10 POUND	Distribution (%)		
		Shelf Price (\$)		
		Base Volume		
00001610011166	HGN WH WT FLR UB H-AL BG AP 5 POUND	Distribution (%)		
		Shelf Price (\$)		
		Base Volume		
00003997800230	BRM GLDN-FLXSD MEAL AP 1.5POUND	Distribution (%)		
		Shelf Price (\$)		
		Base Volume		

3. Enter overrides for **Distribution (%)**, **Shelf Price (\$)** or **Base Volume** for a specific date. You can multi-select dates by using your Shift or Ctrl keys. You can also copy paste multiple values from one field to another.

Note: The Base Grid is also integrated with Excel--you can copy paste values from an Excel sheet into fields in the grid. Additionally, you can import base overrides from Excel. Contact your IBM representative for information on the proper Excel template for importing. Once you have the proper template, you can import values by accessing the drop-down menu in the Base grid and selecting **Import Base Plan Overrides**.

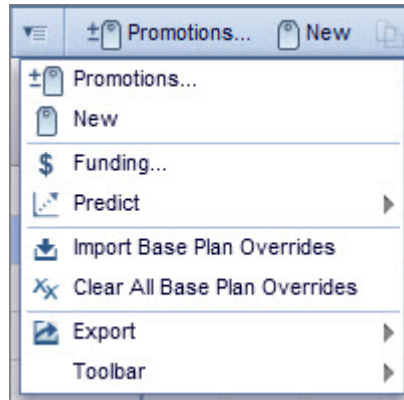


4. You can view **All Markets** or view a specific market by selecting one from the drop-down menu:

	All Markets	X Clear Overrides...
	All Markets	25, 2013 Jun 01, 2013
2 POU	TARGET GM CENSUS TRADING AREA	
	TARGET SUPERCENTER CENSUS TRADING AREA	

You can also click **Clear Overrides** to delete all the overrides you entered for the PPG as well as sort and filter columns to change your view.

Note: To clear all base plan overrides for the entire plan, use the drop-down menu in the Plan Details grid and select **Clear All Base Plan Overrides**:



Chapter 5. Working With Tactics

A tactic refers to the specific details of a promotion. A few examples of tactics include temporary price reduction (TPR), everyday low price (EDLP), and feature and display. In the previous interface, tactics were referred to as “performance details.” The **Tactics** window is seeded, so you can view tactics for each promotion individually.

Note: You can also perform actions on an individual tactic by right-clicking on it.

Related Topics

“Adding Tactics to a Promotion”

“Tactics Types” on page 63

“Editing Tactics” on page 64

Adding Tactics to a Promotion

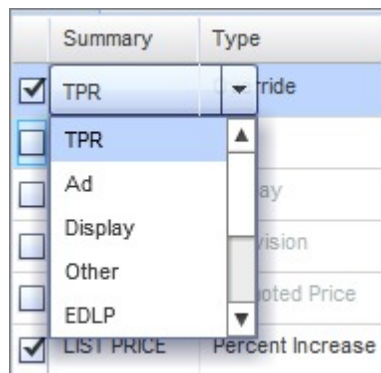
About this task

Because the **Tactics** window is seeded, you can view a promotion and add multiple tactics at the same time.

To add tactics to a promotion:

Procedure

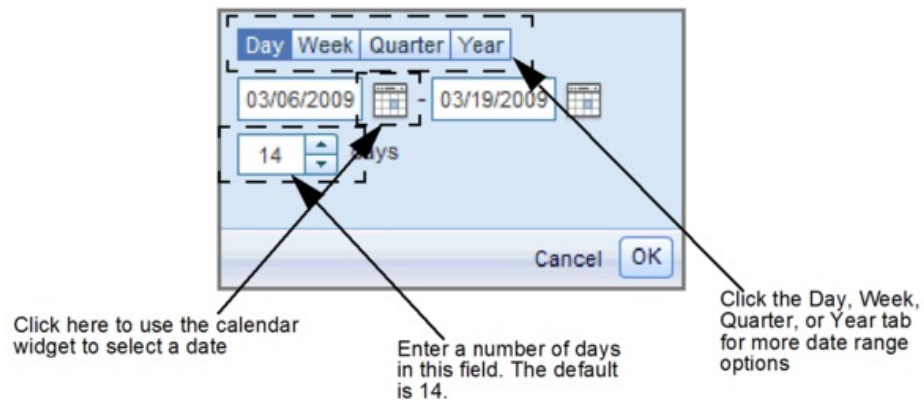
1. Make sure the **Promotions** tab is selected.
2. Click the promotion you want to add tactics to.
3. Click the **Tactics** tab.
4. Enable a tactic by clicking the checkbox next to it. After you have clicked the checkbox, you can also change the tactic from the **Summary** drop-down menu. .



Note: For more information on each of the different tactics and tactic types, see “Tactics Types” on page 63.

5. Select the type of tactic from the **Type** drop-down menu. You will have different types to choose from depending on the tactic you selected.

6. Enter a value for the promotion in the appropriate cell in the **Value** column.
7. Select a level of compliance from the **Compliance** drop-down menu, if applicable. You can select **Historical Low**, **Historical Mean** or **Historical High**. If you are planning using ACV you can also select **PPG Override** or **UPC Override**. If you select an override, enter a value representing the percentage of effective compliance.
8. Click **Calculate** to view the **Effective Compliance** depending on the level of ACV compliance entered. If you selected **Override**, the **Effective Compliance** value will be the value you entered.
9. Enter a **Start** and **End** date. The default duration is 2 weeks. When you click the Start or End date fields, the following window will open



: Enter a date range in the appropriate field, or click the calendar icon to select a date using the calendar widget. The total number of days and the date range selected is also displayed in this window. Click the **Day** tab to specify a number of days after the start date. Click the **Week** tab to specify a number of weeks. Click the **Quarter** tab to specify a number of quarters after the start date. Click the **Year** tab to specify a fiscal year.

10. Click **Ok**.

Note: If you enter a **Start** or **End** date outside the date range of the promotion, the date range of the promotion will be updated to match it.

11. Click **Save**.

Note: If tactics have overlapping products, locations, and time frame, the application will treat them differently than non-overlapping tactics. For example, for overlapping tactics, the application will assume 100% compliance starting with the lowest priced performance tactic.

Related Topics

“Tactics Types” on page 63

“Tactic Types: EDLP and TPR” on page 63

“Editing Tactics” on page 64

Tactics Types

There are different types of tactics that you can add to promotions. The different types are available in the **Summary** drop-down menu.

The different tactics include:

- **TPR:** A temporary reduction in price that lasts less than 8 weeks
- **Feature:** An advertisement in a directly distributed circular.
- **Display:** An off-shelf promotion that requires a secondary placement of the item, typically a standalone, end-cap, or mid-aisle display
- **EDLP:** A temporary reduction in price that lasts longer than 8 weeks
- **Feature and Display:** Feature and Display combined.
- **List Price:** The price the manufacturer recommends to the retailer
- **Shelf Price:** The actual retail price
- **Distribution:** The locations where the product is available
- **User Entered Volume:** User-entered unit volume. This tactic can be applied to all products, including new products and products that have not been modeled. You can use this to override base volume but still use the application to predict the total volume.

Note: If you are planning using the UEV tactic, you can view volume in units, cases, or EQCs. Changing the unit of measurement requires a system setting change. For more information, contact your IBM representative.

Tactic Types: EDLP and TPR

TPR should be used for short-term price reductions that last less than 8 weeks, while EDLP should be used for price reductions that last longer than 8 weeks. The EDLP and TPR tactics share certain types. The following table summarizes the different possible EDLP and TPR types

Type	Promotion	TPR/EDLP
Regular Price	No price change	TPR
Promoted Price	\$3.59	TPR and EDLP
Was/Now	Was \$4.99, now \$4.49	TPR
Cents/Dollars off	\$.50 off	TPR and EDLP
Percent off	50% off	TPR and EDLP
Maintain Margin	Manufacturer: Base Cost = \$3.99 Promo Cost = \$2.99 (Promotion = \$1.00 or 25%) Retailer: Base Price = \$4.69 Promo Price = \$3.62 (Promotion = 1.17 or 25%)	TPR

Type	Promotion	TPR/EDLP
Percent Pass Thru (pass a percentage of the manufacturer's discount to the customer. These promoted costs are based on predicted volumes.) Cannot be used when you select two or more logistical units for a single UPC	Manufacturer: Base Cost = \$3.99 Promo Cost = \$2.99 (Promotion = 1.00 or 25%) Retailer: Base Price = \$4.69 Promo Price = \$4.19 (Promotion = \$.50 or 11%)	TPR
Multiple	Get 4 for \$1.00	TPR and EDLP
BOGO	Buy 1, get 1 free	TPR and EDLP
Multi-buy	Get 2 for the price of 1	TPR and EDLP
Percent Increase	5% Increase	EDLP

Editing Tactics

About this task

By default, the tactics you add to a promotion are applied to all products and markets originally added to that promotion. However, you can exclude markets or products from a tactic (edit participation). This feature is useful if certain products are promoted using an in-store display while others are promoted through an advertisement in a circular, or if certain products are promoted differently in different retailers.

To edit a tactic:

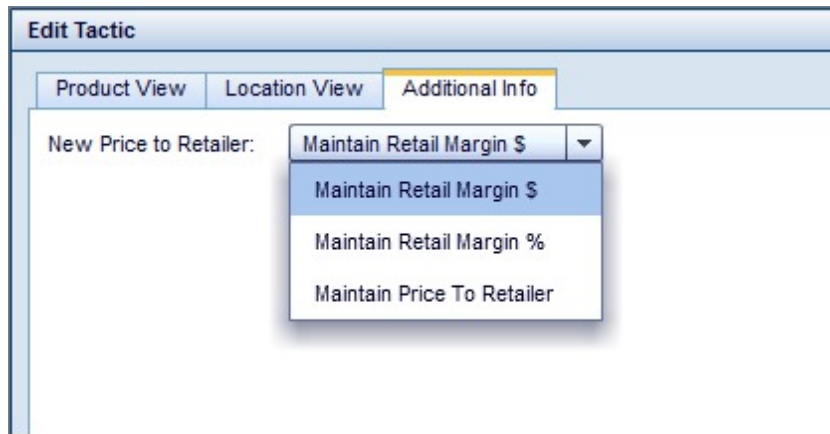
Procedure

1. Make sure the **Tactics** window is open with the promotion you want to edit selected.
2. Click **Edit**.
3. Uncheck products in the **Product View** tab to exclude them from the tactic. Uncheck markets in the **Location View** tab to exclude them from a tactic.

Note: For information on price and ACV versioning, see "Editing Tactics."

4. Click **Update** to save without closing. Click **Done** to save and close the window.

Note: If you select the **List Price** or **Shelf Price** tactics, you can edit additional information regarding margin when editing the tactic. Click the **Additional Info** tab to enter additional information:



Duplicating Tactics

To duplicate a tactic, click the tactic, then click **Duplicate**.

Removing Tactics

To remove a tactic, click the tactic, then click **Remove**. Alternatively, you can disable a tactic by clearing the check mark next to it.

Chapter 6. Working With Allowances

Allowances are grouped in terms of flat fee, performance (shipment and consumption-based), and non-performance. The **Allowances** window is seeded, so you can view allowances for each promotion individually.

Note: You can also perform actions on an individual allowance by right-clicking on it.

Related Topics

“Adding Allowances to a Promotion”

“Editing Allowances” on page 69

“Editing Participation” on page 69

Adding Allowances to a Promotion

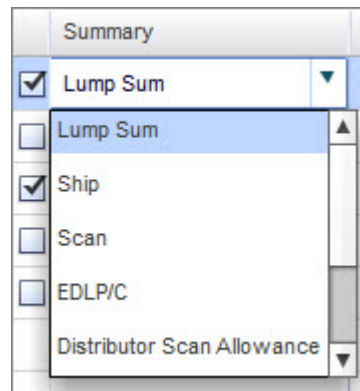
About this task

Because the **Allowances** window is seeded, you can view a promotion and add allowances at the same time.

To add an allowance to a promotion:

Procedure

1. Make sure the **Promotions** tab is selected.
2. Click the promotion you want to add an allowance to.
3. Click the **Allowances** tab.
4. Enable an allowance by clicking the checkbox next to it. After you have clicked the checkbox, you can also change the allowance from the **Summary** drop-down menu.

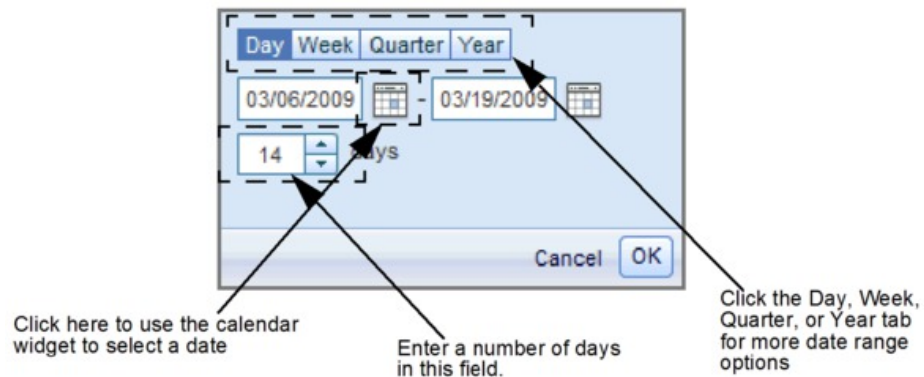


5. Select a **Type** from the drop-down menu.
6. Select from the **Value** drop-down menu. Enter a numerical value, if applicable.
7. Select a payment method from the **Payment** drop-down menu. The default options are:
 - **Off-Invoice:** Manufacturer subtracts the allowance amount from the invoice

- **Bill Back:** Manufacturer invoices the retailer for the full amount of the goods, and the retailer bills the manufacturer for the allowance amount
 - **By Check:** Manufacturer sends allowance amount by check
 - **Deduction:** Manufacturer invoices the retailer for the full amount of the goods, and the retailer deducts the allowance from the payment
 - **Rebate:** Manufacturer sends a rebate after the promotion is over
 - **Accrual Funds:** Retailer accrues trade funds over the year with a manufacturer based on how much is purchased and spends accrued funds promoting the manufacturer's products
8. You can enter a number of weeks in the **Forward Buy Wk.** field if you want to include that information in your promotion. Forward buying is the purchase of an amount of product that exceeds immediate needs to take advantage of favorable pricing offered for promotions. In this field, you can enter a decimal or whole number indicating the number of weeks a retailer can participate in forward buying.

Note: The Forward Buy Wk. field is not displayed in the metric aggregations, but is displayed in the default planning view.

9. Enter a **Start** and **End** date. The default duration is 2 weeks. When you click the Start or End date fields, the following window will open:



Enter a date range in the appropriate field, or click the calendar icon to select a date using the calendar widget. The total number of days and the date range selected is also displayed in this window. Click the **Day+** tab to specify a number of weeks after the start date. Click the **Quarter** tab to specify a number of quarters after the start date. Click the **Year** tab to specify a fiscal year.

10. Click **Ok**.

Note: If you enter a **Start** or **End** date outside the date range of the promotion, the date range of the promotion will be updated to match it.

11. Click **Save**.

Related Topics

"Editing Allowances" on page 69

"Editing Participation" on page 69

Editing Allowances

About this task

You can choose common allowance types, payment methods, and measurement points as you define allowances, but choices can also be customized to meet your company's needs.

To edit settings for your allowances:

Procedure

1. Make sure the **Allowances** window is open with the promotion you want to edit selected.
2. Click **Edit**.
3. Specify how the allowance should be calculated, i.e., as **COGS** or **Add'l Value**, and what percentage to allocate for each in the **Allocate to** fields. The percentages must sum to 100. When the promotion is forecasted, COGS is included in the gross profit calculations, and Add'l Value is included in the additional value calculations.
4. Click **Ok**.

Editing Participation

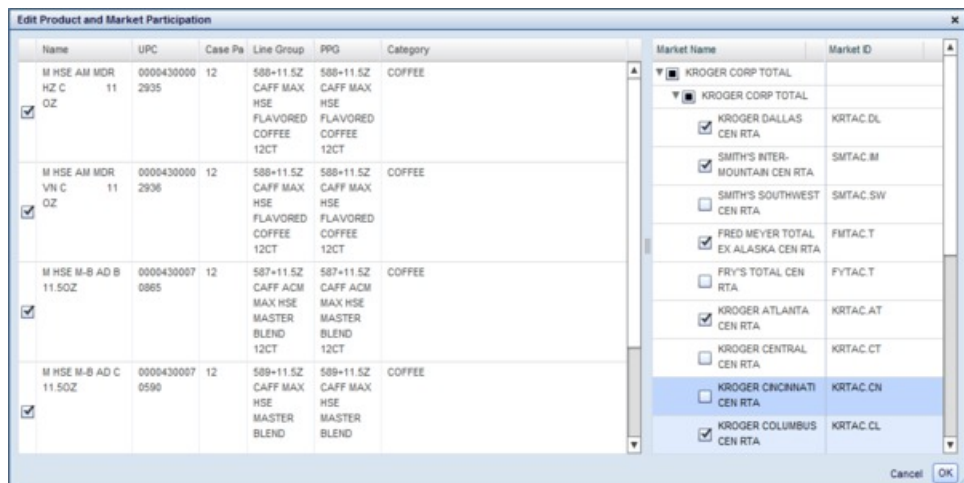
About this task

By default, the allowances you add to a promotion are applied to all products and markets originally added to that promotion. However, you can exclude markets or products from an allowance (edit participation).

To edit participation:

Procedure

1. Make sure the **Allowances** window is open with the promotion you want to edit selected.
2. Click **Participation**.
3. Uncheck products to exclude them from the allowance. Uncheck retailers in the **Markets** column to exclude them from the allowance.



4. Click **Ok**.

Duplicating Allowances

To duplicate an allowance, click the allowance, then click **Duplicate**.

Removing Allowances

To remove an allowance, click the allowance, then click **Remove**. Alternatively, you can disable an allowance by clearing the check mark next to it.

Chapter 7. Settings and Administration

There are configurable options that are important to consider before you begin predicting plans and promotions. You can change prediction settings, link new products to old products, or create product groups.

Related Topics

“Changing Prediction Settings”

“Product Linking” on page 73

“Creating Product Groups” on page 79

Changing Prediction Settings

About this task

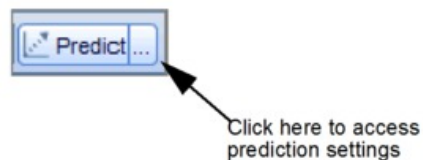
Calculation context is a configurable property that enables you to forecast a promotion or category plan using specific background values to determine forecast properties. You may want to change calculation context before you predict a promotion or plan.

You can access configuration menus within their respective tabs. Settings applied to promotions are in the **Promotions** tab, while settings applied to plans are in the **Plans** tab.

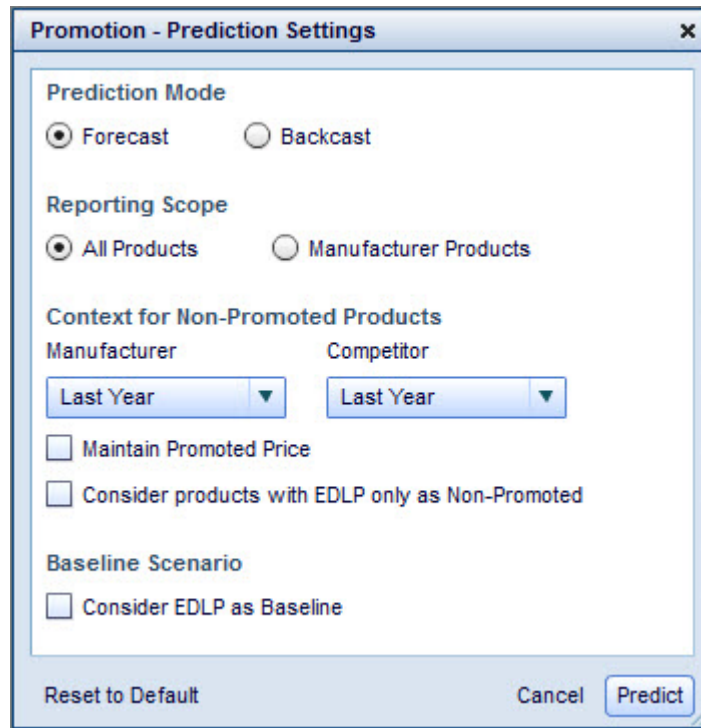
To change the prediction settings of a promotion or plan:

Procedure

1. Make sure the **Promotions** or **Plans** tab is selected, depending on the settings you want to change.
2. Click on the promotion or plan you want to change the prediction settings for.
3. Click the ... after **Predict** button.



4. The **Prediction Settings** window will open:



5. Select **Forecast** or **Backcast**. Select Forecast to view forward-looking predictive results. Select Backcast to assess model fit. Backcasting means that the prediction mechanism assumes that all base and merchandising causal variables are at the same level that they were at the same time in the previous year. If you backcast a scenario and compare it to actuals from last year, you can assess model fit.
6. Select **All Products** or **Manufacturer Products** for the **Reporting Scope**. The prediction will take all products into account regardless of what the reporting scope is
7. Select a setting for **Manufacturer** and **Competitor**. You can select one of the following three options:
 - **No Context:** The prediction mechanism assumes that products not included in the promotion scenario are not promoted at all.
 - **Average:** The prediction mechanism assumes that products are promoted at an average level across all time periods, evening out differences over the course of the promotional period.
 - **Last Year:** The prediction mechanism assumes that products are promoted at the same level that they were at the same time in the previous year. If data from the previous year is not available, predictions will assume no context.

Note: If you select **Average** or **Last Year** for **Manufacturer** or **Competitor**, the prediction mechanism applies past discounts relative to the base price. If you want the prediction mechanism to apply discounts relative to the promoted price instead, select the **Maintain Promoted Price** checkbox.

8. Set the checkbox for **Consider EDLP only as Non-Promoted**, if applicable. When this setting is selected, the prediction mechanism allocates historical average promotion levels to products with the Everyday Low Price tactic. This setting should be used when you want to create realistic price-only scenarios

without entering additional promotional activity, and is appropriate if your business model does not consider EDLP as a promotional activity.

9. Set the checkbox for **Consider EDLP as Baseline**, if applicable. This setting is appropriate if a promotion includes overlapping EDLP and TPR activity, but your business model considers EDLP as a sunk cost that should be included in the baseline and not the lift. When this setting is selected, the ROI and lift metrics will only take TPR activity into account, instead of EDLP and TPR activity.

Note: You can set the checkbox as checked or unchecked by default if you have the proper permissions enabled. Contact your IBM representative for more information.

10. Click **Predict** when finished.

Product Linking

Product linking allows a new product to be linked to an existing product so the new product can be forecasted and optimized in pricing activities. When a new product enters the assortment, it has no sales history for estimating the product multipliers used for the forecasts. Product linking provides a specific mechanism to assign demand elasticity and product multipliers to new products based on the history of similar products.

Specifically, product linking borrows the POS data of an existing product and applies it to a new product. The new product will then have the same product multipliers as the mature product. You can also manipulate the share and sales effect that the new product will have on its Promoted Product Group (PPG).

Product linking is used for one of two cases:

- The new product is expected to be the same or very similar in expected sales/consumer response behavior to an existing or discontinued product in the PPG.
- Direct replacement products in the same PPG. In order to ensure proper forecast of the combined sales of the new product and the existing ("mature") product, the existing product needs to be discontinued. Timing here is important.

These attributes are copied from the modeled product to the linked new product:

- Product locations - The locations that you select.
- Product multipliers - For every selected location.
- ACV levels
- Base Support values

Products are linked until you manually unlink them, for example, for a modeling refresh in IBM OpenLink. The link status automatically becomes invalid if any of the following attributes change for the new product or for the modeled product:

- Product category
- PPG
- Unit of measurement

Linking Products

About this task

To manually link products, you first choose from a list of new products that have no product multipliers or links. You select the modeled product to link to and the locations of the modeled product for which the product multipliers need to be borrowed. The product multipliers from the modeled product are then copied to the non-modeled product with share multipliers regenerated for all products in the same PPG.

Note: You must have the **Enable Product/Store Linking** permission to link products.

To manually link new products:

Procedure

1. Click **Data > Product Linking for PPG Model** to open the **Product Linking** page.
2. Click the **Unlinked New Products** tab.

Product Name	UPC	Nielsen Tag	Link Status	PPG	Hfg	Brand	Size	UOM	Has Attributes Status
COOL WHSP RTS LT&CR CH 15 OZ	00004300000332	NU.000798				UNKNOWN NOT_PROVIDED	10 OZ	No	Active
G-F-P MFH MX UNFLV 15 OZ	00073788096120	NU.007143		AO SBG PPGS	AO HFRS	AO SBG BRANDS	15 OZ	Yes	Active
PB CMK CPOK YLW HL/FR SP 18.6OZ	00001800028031	NU.005913		AO SBG PPGS	SMUCKER'S	AO SBG BRANDS	18.6 OZ	Yes	Active
D H K-C CPOK YLW/FR SP 13.6OZ	00003700040033	NU.002312		AO SBG PPGS	PBNIACLE	AO SBG BRANDS	13.6 OZ	Yes	Active
D H B-H FG BAG TL 10.25OZ	0006420942153	NU.005863		AO SBG PPGS	PBNIACLE	AO SBG BRANDS	10.25 OZ	Yes	Active
D H HS FVT FRT CSP MX CHRY 29.8OZ	0006420940082	NU.006092		AO SBG PPGS	PBNIACLE	AO SBG BRANDS	29.8 OZ	Yes	Active
D H HS FVT FRT CSP MX APL CSP 29.8OZ	0006420940080	NU.006057		AO SBG PPGS	PBNIACLE	AO SBG BRANDS	29.8 OZ	Yes	Active
D H FRT CSP MX PCH PECAN 15 OZ	00003700040072	NU.002316		AO SBG PPGS	PBNIACLE	AO SBG BRANDS	15 OZ	Yes	Active
D H FRT CSP MX BERRY BASKET 15 OZ	00003700040074	NU.002315		AO SBG PPGS	PBNIACLE	AO SBG BRANDS	15 OZ	Yes	Active
D H DST BR MX PRLN TOFFEE 35.6OZ	0006420942758	NU.006215		AO SBG PPGS	PBNIACLE	AO SBG BRANDS	35.6 OZ	Yes	Active
GOLD MEDAL FF AGL SP 16 OZ	00001600011195	NU.007059		AO SBG PPGS	GENERAL MILLS	AO SBG BRANDS	16 OZ	Yes	Active
BC CMK CPOK VHT STM/FR SP 32 OZ	00001600019928	NU.005513		AO SBG PPGS	GENERAL MILLS	AO SBG BRANDS	32 OZ	Yes	Active
BC CMK CPOK DV FD/FR SP 34.2OZ	00001600012573	NU.006112		AO SBG PPGS	GENERAL MILLS	AO SBG BRANDS	34.2 OZ	Yes	Active
BC CMK CPOK CH FDG HL/FR SP 36 OZ	00001600011163	NU.006090		AO SBG PPGS	GENERAL MILLS	AO SBG BRANDS	36 OZ	Yes	Active
BC R RICE CH SWT PD 12.35 OZ	00001600042800	NU.005219		AO SBG PPGS	GENERAL MILLS	AO SBG BRANDS	12.35 OZ	Yes	Active

3. Choose a category of products from the **Category** drop-down list to display unlinked products.
4. Right-click, and select **Link Product**.

Product Name	UPC	Nielsen Tag	Link Status
CTL BR CRO PLPRT CN FZ 16 OZ	00947582861844	NU.012547	
CTL BR CRO FZ 14 OZ	00947582829515	NU.012547	
MA B BRD TST GRL FZ 12.35 OZ	00002732600024	NU.012433	

5. The **Link Product** panel shows the mature (modeled) products that you can link to. The products have the same product category as the selected unlinked product. The **Product Link Summary** at the top shows the attributes of the new product.

Product Link Summary: CTL BR CRD PLPRT CN FZ 16 OZ (Link #1)

Unlinked Product Name: CTL BR CRD PLPRT CN FZ 16 OZ
 Unlinked Product UPC: 00947582861844
 Unlinked Product SKU: NU.012548
 Link Status: No Link

Category: FBG
 PPG: AO FBG PPGS
 Size: 16
 Unit of Measurement (UOM): OZ

Select a mature product to link new product to :

Report: PPG
 Link Product: Search:

Select	Product Name	UPC	Status	Nelsen Tag	Brand	Size	UOM	First Scanned Date	Last Scanned Date
<input type="radio"/>	PB BRD PARATHA SPRNG O FZ 16.9OZ	00087195000002	Active	NU.011671	AO FBG BRANDS	16.9	OZ	Mar 8, 2008	Aug 21, 2010
<input type="radio"/>	PB BSCT DGH STH-ST FZ 25 OZ	00009456206300	Active	NU.005003	AO FBG BRANDS	25	OZ	Mar 8, 2008	Aug 28, 2010
<input checked="" type="radio"/>	PB BSCT DGH BMK FZ 75 OZ	00001800042417	Active	NU.011887	AO FBG BRANDS	75	OZ	Aug 9, 2008	Aug 28, 2010
<input type="radio"/>	PB BSCT DGH BMK STH-ST FZ 16.64OZ	00009456230474	Active	NU.011330	AO FBG BRANDS	16.64	OZ	Mar 8, 2008	Aug 28, 2010
<input type="radio"/>	PB HBC SVT RL DGH CN FZ 21.7OZ	00001800085398	Discontinued	NU.009162	AO FBG BRANDS	21.7	OZ	Mar 8, 2008	Sep 5, 2009
<input type="radio"/>	PB MW BSCT DGH BTR FZ 16 OZ	00001800072702	Discontinued	NU.010293	AO FBG BRANDS	16	OZ	Mar 8, 2008	Oct 31, 2009
<input type="radio"/>	PB MW BSCT DGH BMK FZ 16 OZ	00001800072701	Active	NU.010337	AO FBG BRANDS	16	OZ	Mar 8, 2008	Jul 10, 2010
<input type="radio"/>	HJ BSCT DGH BMK FZ 26.4OZ	00005150028215	Active	NU.011677	AO FBG BRANDS	26.4	OZ	Mar 8, 2008	Aug 28, 2010
<input type="radio"/>	HJ BSCT DGH STH-ST	00005150028220	Active	NU.011692	AO FBG BRANDS	26.4	OZ	Mar 8, 2008	Aug 28, 2010

Click a radio button in the **Select** column next to the modeled product that you want to link to. The **Status** column indicates if the product is still active or has been discontinued.

- Click **Next** to advance to the **Input Volume** panel, or click **Cancel** to cancel the current link. If you cancel and more than one link has been created, you will navigate to the **Link Review** panel where you can review and select the other links to submit, or add the next new link. You can also cancel all created links

Mature Product Information: Link #1

Name: PB BSCT DGH BMK FZ 75 OZ
 UPC: 00001800042417
 SKU: NU.011887
 PPG: AO FBG PPGS

Number of Active Products : 443
 Number of Locations Distributed to : 3

New Product Information: Link #1

Name: CTL BR CRD PLPRT CN FZ 16 OZ
 UPC: 00947582861844
 SKU: NU.012548
 PPG: AO FBG PPGS

Estimated Weekly Base Volume : units
 Incre Base Volume Percentage : %
 Estimated Weekly Total Volume : units
 Incre Total Volume Percentage : %
 Distribution ACV : %
 Promotion Base Support : %

All locations in which the modeled product currently resides are selected by default in the **Link Location** panel. The **Product Link Summary** at the top shows the attributes of the new product.

Note: If the stores in which the new product will sell have been previously defined (in the product status file, for example), only the stores that the new product and modeled product are active in will be available.

You can also click the **Link Location** tab to display the **Link Location** panel.

- Select one or more store locations in the **Select** column. Deselect locations that are not applicable.

Product Link Summary: CTL BR CRO PLPRT CN FZ 16 OZ (Link #1)

Unlinked Product Name: CTL BR CRO PLPRT CN FZ 16 OZ
 Unlinked Product UPC: 00947582861844
 Unlinked Product SKU: NU.012548
 # of Locations: 3

Link To Product Name: PB BSCT DGH BMK FZ 75 OZ
 Link To Product UPC: 00001800042417
 Link To Product SKU: NU.011887

Select borrowing location :

Report: Search:

Link Location

Select	Market Name	Market Number	Divison Name	L1	L2	L3	L4
<input checked="" type="checkbox"/>	PICK N SAVE CORP ONLY TOTAL CENSUS TA		PNSCOTCTF ROUNDYS				PICK N SAVE CORP ONLY TOTAL CENSUS TA
<input checked="" type="checkbox"/>	MILWAUKEE \$2 MM	MIL	SCANTRACK				MILWAUKEE \$2 MM
<input checked="" type="checkbox"/>	TOTAL US OVER \$2 MILLION	US.2M	TOTAL US				TOTAL US OVER \$2 MILLION

8. After you have selected the locations, click **Finish**. You will automatically be navigated to the **Link Review** panel where you can select the links to submit, or add the next new link. You can also cancel all created links.

Report: Search:

Link Review

Select	New Product UPC	Mature Product UPC	New Product PPG	Mature Product PPG	Estimated Weekly Base Volume	Incremental Base Volume Percentage	Estimated Weekly Total Volume	Incremental Total Volume Percentage	Distribution ACV	Promotion Base Support
<input checked="" type="checkbox"/>	00947582861844	00001800042417	AO FBG PPG5	AO FBG PPG5						

All submitted product links will appear in the **Linked New Products** panel in the **Product Linking** page. The list of products includes the link status and other information about the new and mature products. You can also right-click on a product and select **View/Edit Link** to review and edit linked products or select **Unlink Product** to unlink them.

Linked New Products

Actions:

Report: Search:

Category: # Of Locations:

Link Date	Link Status	Product Name	Brand	UPC	Neiken Tag	Size UOM	Mature Product Name	Mature UPC	Mature SKU
Oct 6, 2011	Link Requested	CTL BR CRO PLPRT CN FZ 16 OZ	AO FBG BRANDS	00947582861844	NU.012548	16 OZ	PB BSCT DGH BMK FZ 75 OZ	00001800042417	NU.011887

Share and Sales Impact of New Products

Product linking is flexible in allowing users to manipulate the impact of both share and sales that a new product will have on a PPG. Since you are given this flexibility, you want to ensure that your volume inputs are as realistic as possible, as they will impact your forecasted scenario results. The following examples illustrate various ways in which new products entering your assortment can impact existing products in a PPG and how you would enter your volume inputs.

Non Replacement - Same Share, Same PPG Volume

Non-Replacement (Like Item, mature product is still active):

New products introduced to a PPG through product linking do not necessarily increase the overall forecasted volume for the PPG. Overall sales forecasts are re-adjusted to reflect an incremental product that steals share from existing products.

You have a new flavor of yogurt coming in, for example. It does not necessarily mean the change will drive additional volume to the category. Consumers could choose to pick this new flavor instead of others in the PPG.

For this case, you would not enter any value for incremental volume.

Direct Replacement - Same Share, Same PPG Volume

Direct Replacement (mature product is discontinued):

A product is specifically being replaced by the same or virtually the same product, so the volume of replacement item is expected to directly replace the mature product's volume. However, the mature product's volume is now lower than usual since it has been discontinued.

For example, a new product comes into your assortment and the older version will be discontinued, but you expect the new item to behave very similarly to the mature item before it was discontinued.

For this case, you must enter the estimated average weekly volume for the new product, and the estimated incremental volume that will be added to the PPG volume or base volume. Because discontinued products have a zero or low volume share, you must estimate a base volume for the new product to receive a volume forecast.

Non-Replacement, Same Share, Increased PPG Volume

Non-Replacement (Like Item):

If a new product is introduced to the assortment and you know that it will lead to increased volume for the PPG, you can enter a percentage of incremental volume that is applied to the PPG sales, based on the new product volume. Overall sales forecasts are readjusted to reflect this, and the share will be adjusted for all products in the PPG

For example, a new color is coming into your assortment. Your vendor is planning on advertising the new product and expects that the overall volume will grow for all of the products in the PPG, but that the new product will not necessarily gain share.

For this case, you would enter only an incremental volume since you expect the PPG to grow. The new product will be like an existing product in the PPG, so you enter nothing for Average Weekly Volume.

Direct Replacement - Increased PPG Volume

Direct Replacement:

A new product enters the assortment to replace another item, but due to special promotional impacts or the enhanced nature of the product, you expect an increase in volume in both the product and PPG.

For this case, you would enter only an incremental volume since you expect the PPG to grow. The new product is like an existing product that is leaving the assortment, so all of its volume will go to the new product. You enter nothing for Average Weekly Volume.

Non-Replacement, Increased Share, Same PPG Volume

Non-Replacement (Like Item):

You can also link items in such a way so that the new item receives more share than the mature item that it is linked to. This is useful for a new item that may steal share away from other products in the PPG, but the PPG volume will not change.

For this case, you would enter an Average Weekly Volume or base volume. The new product will take more share than the mature product, so you enter the same or more Average Weekly Volume or base volume for the new product. This will drive more share to the new product, but leave the PPG volume unchanged if you leave the incremental volume blank.

Viewing Product Links with Invalid Status

About this task

You can review the product links with validation errors and make corrections in the **Invalid Links** panel.

The validations performed during the import process will detect the following problems for the new or mature products:

- New product and mature product belong to different product categories
- New product and mature product belong to different PPGs
- The estimated weekly volume and incremental volume percentages are invalid
- Mature product does not have a modeling coefficient at any location

To view product links with invalid status:

Procedure

1. In the **Linked New Products** tab of the **Product Linking** page, choose **Invalid Links** from the **Report** drop-down list. Only the product links with **Invalid** status will display.
The **Invalid Links** report displays information such as the name of the new product, the UPC and SKU of the new and mature product, and the number of errors for the link. The links will remain inactive until the errors are corrected and the links are re-validated.
2. To filter the invalid links by error type, select each error type from the **Error Type** drop-down menu. Information relevant to the selected error type will display. All of the invalid links will display for the selected category by default.
3. You can also right-click on a product, and select **View Validation Errors** to open the **Product Link Validation Error Details** page. Descriptions of all of the validation errors for the selected product will display with the ID of each product link. Click **Return to Product Linking** to return to the **Linked New Products** panel.
4. You can unlink all of the product links with validation errors. The Link Status will change to **Pending Deletion**, and then the product links will disappear from the page.

Automatic Unlinking

The regular process for "retiring" or removing product links is an automated trigger-based process driven off the number of weeks of POS data observed for the new product. The default system setting is 10 weeks. When a product has at least 10 weeks of POS data at any of the linked locations, the link will be eligible to be retired.

The link still remains in place (so the product keeps coefficients) until the re-model is run. When re-modeling begins, the unlinking actions are triggered. At that point, the previously linked product has its link status updated to "no link", its coefficients from the mature product are cleared out, and it receives coefficients for each product/store combination in which the product is active and has POS history. This may result in a change in the number of active SKU/Store combinations for the product at the time of re-modeling.

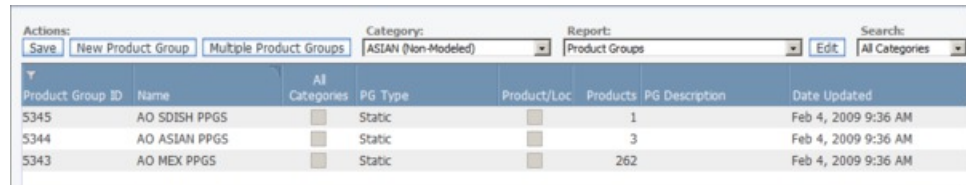
The default settings for the number of weeks to retire a link can be configured at the category level by entering overrides within the IBM OpenLink **Category Manager** page in the **Min Weeks to Retire Link** column. If the field is blank on this page for a category, the category will default to the system setting value.

Creating Product Groups

About this task

To create a product group or promoted product group:

1. Select **Data > Product Groups**. The **Product Groups** page shows (for a specified category) any product groups, number of members in each group, last date updated, and the user who made the update.



Product Group ID	Name	All Categories	PG Type	Product/Loc	Products	PG Description	Date Updated
5345	AO SDISH PPGS	<input type="checkbox"/>	Static	<input type="checkbox"/>	1		Feb 4, 2009 9:36 AM
5344	AO ASIAN PPGS	<input type="checkbox"/>	Static	<input type="checkbox"/>	3		Feb 4, 2009 9:36 AM
5343	AO MEX PPGS	<input type="checkbox"/>	Static	<input type="checkbox"/>	262		Feb 4, 2009 9:36 AM

Note: From this screen, you can right-click a Product Group to **Edit**, **View Details**, **Delete** or **Export Table**.

2. Click **New Product Group** to create a new product group. The **New Product Group** page opens.

New Product Group

* : indicates required field

Name*:

Type*:

- Automatically update product group.
- Maintain static product group.
- Maintain static promoted product group.

Category*:

Product Criteria*:

[Edit Criteria...](#)

Option: Include products related by:

- Line
- Brand Family
- Size Family
- Other1 Family
- Other2 Family

[View Product Group Detail](#)

3. Enter a name for the group in the **Name** field. Use a unique name that is easily identifiable and does not exceed 50 characters.
4. Select an applicable **Type**.
5. Choose a product category from the **Category** drop-down menu.
6. Select **Product Criteria** for your product group.
7. Click **View Product Group Detail** to preview the product group you have created.
8. Click **Add Next Product Group** to create an additional product group, or click **Done** to finish.

Alternatively, to create a product group through file import:

1. Select **Data > Import**.
2. Select **Product Group** from the **Data Type** drop-down menu.
3. Enter a description.
4. Click **Browse...** to select a file to upload.
5. Click **Import**.

The image shows a software dialog box titled "Import". At the top right, there are three icons: a question mark, a refresh symbol, and a close (X) symbol. Below the title bar, there is an "Actions:" section containing two buttons: "Import" and "Cancel".

The next section is "Import Data", which contains a "Data Type:" label and a dropdown menu. The dropdown menu is currently set to "ABC Distribution Center".

The following section is "Description", which contains a "Description:" label and a text input field containing the word "description".

The final section is "Upload File", which contains a "File:" label, a greyed-out text input field, and a "Browse..." button.

At the bottom right of the dialog box, there are two buttons: "Import" and "Cancel".

Note: You can also create product groups through OpenLink. Contact your IBM representative for more information.

Chapter 8. Glossary

This glossary includes terms and report fields used throughout this manual.

Activity-Based Costing

An accounting system that allocates costs of all activities to each item (rather than spreading costs uniformly across all items, which is what simpler methods like traditional cost accounting do), so that you know exactly how much it costs to sell an item once you include all supply chain costs such as transportation, labor, and overhead.

Accrual Fund

Either an allowance, or a funding method used to allocate trade funds to accounts. When it is applied as an allowance, the manufacturer agrees to pay the retailer a set amount for every case that they buy during the year (this can include all base volume and all promoted volume). In return, the retailer agrees to run a set number of promotions for the manufacturer throughout the year. The difference between an accrual fund and a case allowance is that, with the accrual fund, one deal is done for the entire year's worth of promotions, and with the case allowance, different terms are negotiated for each event. When the accrual fund method is used for trade fund allocation, it is used to decide how many trade funds will be allocated to a specific account. There are usually two variants of the accrual fund when it is used in this way: a live accrual fund and an historic accrual fund. With a live accrual fund, the number of cases that the retailer buys from the manufacturer in this year is used to decide how much of the trade funds will be spent with each particular account. With the historic method, the number of cases bought last year dictates how much of the trade funds will be allocated to each account. When the live version is used, it is important (but not always essential) that the accrual fund amount for each specific account is greater than the sum of the costs for all the promotions that are planned with each specific account. Accrual funds take a similar form to the case allowance, where a set amount per unit (case, pound, liter, ounce, fluid ounce, count) is agreed with the retailer for every unit that they buy. This amount accrues in a fund that is then to be used to pay for promotions with that account. When the accrual fund method is being used as the allowance mechanism (as described in the first paragraph), the retailers will receive all of the money. When the accrual fund method is being used as an allocation mechanism, retailers view the accrual funds as funds that must be set aside and used to fund only promotions.

Ad Promotion of a good through advertisement in various media channels, including print, radio, and television.

Ad Allowance

A dollar amount that the retailer receives for every case that the retailer purchases from the manufacturer (paid after the ad has run).

Allowance

The amount of discount that the retailer receives from the manufacturer. The manufacturer dictates how and when the allowance is received. There are two types of allowance: performance allowance and non-performance allowance.

Allowance %

The percentage that the retail cost is reduced due to the manufacturer's allowances.

Assortment

The mix or 'assortment' of items that a retailer stocks. They periodically review their assortment to figure out which items should be discontinued, and which new items should be added.

Avg. Base Cost

The average base cost of a product within a package for all markets in a location group class.

Avg. Base Price

The average base price of a product within a package for all markets in a location group class.

Avg. Extended Cost

$\text{Avg. Cost} * \text{Potential Avg. Quantity} * \text{Imputed Percentage}$.

Avg. Extended Price

$\text{Avg. Base Price} * \text{Potential Avg. Quantity} * \text{Imputed Percentage}$.

Avg. TPR %

The average of the TPRs in the stores that are in the POS data.

Backhaul

A term used in logistics when a truck picks up another load for a return trip after unloading its original haul.

Backhaul Allowance

The manufacturer provides the retailer with a backhaul allowance based on every case of product that the retailer collects from the manufacturer's warehouse using contracted trucks.

Base Price

The regular non-promoted shelf price.

Base Support

Base support is the total baseline volume exposed to a promotion. The base support % value is equal to the base support volume for a promotion driver divided by the total baseline volume. Base support % values can be used for categories which take advantage of the PPG model. If your company is configured to use base support, you can select from average base support % values (**Historical Low**, **Historical Mean** or **Historical High**) for specific performance details during promotion creation. You can also override the system-generated values at the performance detail level, or at the product level for each performance detail.

Basis Point

A basis point is the smallest measure used to quote financial return. One basis point equals a 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 highly sophisticated approach to statistical modeling that is useful in sparse data environments. Bayesian Inference is based on theories by Rev. Thomas Bayes, who lived over 200 years ago.

Bayesian Shrinkage

A Bayesian methodology whereby information is borrowed across products and stores in order to intelligently “shrink” model estimates and moderate extreme values.

BOGO/BOGOF

“Buy One Get One” Free. A promotion tactic often used to give consumers an incentive to buy and stock up on a product.

Brand The name (usually trademarked) that a manufacturer assigns to a group of items. The brand name is not always the same as the manufacturer name, since a manufacturer can own several brands. For example, Clorox brands include: Clorox, Pine-Sol, Armor All, Brita; Proctor & Gamble brands include: Tide, Mr. Clean, and Cover Girl.

Brand Class

Classifications of brands. Brand classes let you create brand relationships between products so you can set rules for optimizations. For example, you might put generic sodas in a Private label brand class and Coke in a National label brand class.

Brand Class Rule

A constraint applied between brands that dictates their price relationship. Example: Premium brands are always more expensive than economy brands.

Brand Family

Brand families let you further define subsets of a brand class. For example, you might have Coke and Pepsi products in a National label brand class and Generic soda A and soda B in a Private label brand class. To set a rule that controls the price relationship between Coke and Generic soda A, you must put the Coke products in a Coke brand family and Generic soda A in a Generic A brand family.

Brand Manager

The Brand Manager charts the strategy and tactics surrounding the Brand plan (for example, which new products get developed, and which marketing mix events will occur). The marketing research department supports the Brand Managers.

Business Rules

Constraints on the optimization that allow rules to describe strategies or policies that are important in guiding the outcome of the optimization to suit the customer’s needs.

Buying Allowance

An allowance that the retailer receives for every case of product that they buy. This is usually used when the manufacturer has a lot of excess inventory that they need to move quickly and is stated as a dollar value per case.

Calculation Context

A configuration setting that forecasts your promotion in a specific “context” in order to account for historical levels of promotion on non-promoted products.

Cannibalization

The negative effect on sales of a product when a consumer buys one product instead of another (often due to pricing, promotion, or new desirable attributes). For example, when a new flavor of yogurt is introduced, it may “cannibalize” sales of other flavors or brands of yogurt.

While consumers may not buy more yogurt overall (“category expansion”), they may alter the choice of their usual product for the new one.

Case Allowance

The most common form of performance allowance is called a case allowance where the retailer receives a fixed dollar amount off of the price of a case of the product. For example, a case allowance of \$5 for Mr. Clean would mean that the retailer can buy a case of Mr. Clean from Procter & Gamble for \$5 less than the normal price. This allowance applies during the deal period and applies on every case that the retailer buys during the deal period irrespective of how much the retailer actually sells. It is therefore common practice for the retailer to buy a huge amount of volume just before the deal period ends and then to sell that excess inventory to the consumer at full price over the weeks after the deal period has finished. **Note:** Retailers sometimes do not use the term case allowance even when they are talking about a case allowance. They sometimes refer to the payment mechanism when they are talking about a case allowance, such as an off-invoice allowance, billback allowance, or by check allowance. A potential benefit for the retailer of the case allowance method is that the retailer can receive the discount at the time that they buy the product as opposed to having to wait to receive it (but only if they are using the off-invoice payment mechanism). This does not apply with the rebate version of the case allowance or with scan allowances.

Case Volume Lift %

The percentage of cases that will be sold as a result of a promotion.

Category

A collection of related products that are substitutes or complements. Retailers and CP companies use categories to group and manage products (for example, produce, dairy, and frozen foods).

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. They are the basis for category predictions and forecasts, and allow accurate what-if analyses of different promotion plans.

Chain A branded collection of stores with one owner (for example, Longs, and Winn-Dixie).

Client The user-interface application installed at the customer site.

Club Card

A program that consumers sign up for to enjoy discount or reward programs in return for tracking of consumer behavior patterns. Also called Frequent Shopper or Loyalty Card program. When creating a promotion, you may set the **Apply to Club Card** flag for TPR-type performance details to indicate that a promoted price will only be available to club card members. Currently, this factor does not affect forecasting.

Note: The **Club Card** column on the **Performance Details** tab of the **Promotion Details** page and the **All Promotions** report (Agg: Performance Details) on the **Master Calendar** tab indicates whether a TPR has the **Apply to Club Card** indicator turned on.

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 (Cost of Goods Sold)

COGS (cost of goods sold or cost of sales) includes the direct costs that are attributable to the production of the items sold by a company. This amount includes the materials cost used in creating the item along with the direct labor costs used to produce the item. It excludes indirect expenses such as distribution costs and sales force costs.

Competitive Prices

Prices that are perceived to be a good value compared to what the competition is charging.

Competitor Prices

Prices that the competition (other stores that consumers could choose to shop instead) is charging for the same items.

Competitor Price Rule

An example of a business rule, this feature allows users to enforce rules that ensure that prices are competitive. For example, you could impose a rule that says prices on cereals are within 5% of competitor prices.

Complementary Products

Items that consumers usually buy together. The classic example is hot dogs and hot dog buns.

Constraint

A rule that forces the optimization to generate results that fall within a certain range.

Consumer

A person that buys items at a store.

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 consumers have for a product or retailer that makes them more likely to purchase a specific product, or shop at a specific store.

Consumer Unit

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. Your system may be configured to warn you when a consumer unit from which you've added promoted products has been modified to include additional products. This warning is triggered when the affected promotion is validated.

Note: Consumer unit functionality is optional and may be turned off for some companies.

Contribution Margin

The dollars remaining after variable costs are subtracted from adjusted gross margin. A more accurate measure of profit than gross margin.

Contribution Margin%

Contribution margin divided by revenue.

Cost Per Incremental Case

A measure of how expensive each case of incremental volume is.

Cost Per Incremental Unit

A measure of how expensive each unit of incremental volume is.

Cost of Capital

The costs associated with carrying merchandising inventory.

Cost Per Incremental Unit

Original price minus promoted price plus any trade funds.

Cross-Elasticity

The relationship between the purchase of one product and the purchase of another. If the products are completely independent, the cross-elasticity is zero. If products are complementary, the cross-elasticity is positive. If products are substitutable, the cross-elasticity is negative.

Cumulative Quantity Discount

The CQD is 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. This is a popular allowance for liquor.

Deal Promotional pricing for a good; sometimes referred to as an offer.

Deal Period

The deal period can be specified as a certain period of time and will usually include the order date (the date that an order must be placed with the manufacturer to qualify for the manufacturer's discounted price), the ship date (the date that orders must be shipped in order to have enough product available in the store for the start of the promotion), and the delivery date (the date that the product must be delivered to the store to have enough product available in the store for the start of the promotion).

Deal Term

The cash element of an offer (a subset of the offer). Deal terms usually consist of five parts: the deal/performance period, the flat fee, the allowance, the forward buy, and the payment mechanism.

Demand

The amount of a product that will be purchased at a particular price.

Demand Curve

Demand over a range of prices over a period of time.

Demand Group

A collection of highly substitutable products. The price and promotion of one item in the group directly affects demand for the other items.

Discount

The amount of money that the consumer receives off of the base price of an item, which is sometimes referred to as a TPR.

Display

In-store promotions that can take the form of a stand-alone display at

different locations throughout the store, an end-of-aisle display, or a mid-aisle display. Displays are defined as off-shelf promotions and require a secondary placement of the item (in addition to the primary placement of the item on the shelf).

Display Media

Types of display media such as in-store displays. These are subtypes of a tactic.

Drop Ship Method

When middlemen avoid carrying costs of inventory by sending single unit orders for products to manufacturers (or major stocking distributors), who drop ship the merchandise directly to the customers of the middlemen.

DSD DSD or direct store delivery is a method of delivering products directly to the retail store, bypassing the retailer's warehouse.

EDLP EDLP (Every Day Low Price) is a performance detail type which should be used when a price change lasts more than eight weeks or significantly longer than your typical temporary price change. Forecasted volume changes from EDLP promotions are based on changes to the base price coefficient rather than the TPR coefficient. An EDLP performance detail and a TPR performance detail may occur during the same period of time. For example, you may create a three-month \$0.50 reduction on a product, as well as a \$1.50 reduction that performs for the first week of each month. There are two ways to do forecast this. You can create a single promotion that includes both types of performance detail or you can create two separate promotions, then add both to a category plan. Your implementation may be configured to report incremental EDLP volume separately from incremental "promoted" volume at the category plan level. If your program has this configuration, incremental volume attributable to EDLP performance details will be forecasted separately from other performance detail types. By default, these results are reported as a combined volume.

Elasticity

The responsiveness of the quantity purchased of an item to changes to the item's price. If the quantity purchased changes proportionately more than the price, the demand is elastic. If the quantity purchased changes proportionately less than the price, the demand is inelastic. For example, price increases by cigarette manufacturers have a relatively small effect on cigarette consumption, so the demand for cigarettes is inelastic.

End Cap

A display at the end of an aisle.

Equivalent Retail Price

Price per equivalent unit, calculated by taking shelf price divided by the standardized unit of measure.

Equivalent Unit

A standardized unit of volume using equivalization.

Equivalent Volume

The relative number of equivalent units sold. Depending on which size product is defined as the "standard" by the modeling process, the number of equivalent units sold could be higher OR lower than the actual number of units sold. For example, if two 12-packs of Coke = one equivalent case, and two equivalent cases sold, the equivalent volume would be '2' whereas the number of 12-pack units sold would be '4'.

Equivalization

The assignment of a standardized unit of measure to a product based on the product's description and the spread of sizes/counts that apply to that description. This allows direct comparison across a wide range of sizes. For example, one case of Coke and two 12-packs of Coke = 1 equivalent case. Equivalization is a process used for modeling and users may choose to ignore or hide Equivalent Unit and Equivalent Volume fields.

Event Promotion activity that has a theme around it (such as the Fourth of July), although events can also revolve around a specific manufacturer (such as P&G promotion week). Events usually consist of a group of various different promotions consisting of Ads, displays, and TPRs in some combination. Retailers will also create custom-made (and named) events specific to their stores. For example, Winn-Dixie has their "Wall-of-Values" event where they dedicate an entire wall to special product promotions. The retailer's VP of merchandising will generally also place some rules around events/promotions, such as: no product can be on an end-cap for more than 20% of the time, paper products cannot be on discount more than 50% of the time, or no product can be discounted by more than 50%.

Financial Modeling

A process that enables retailers and manufacturers to understand the cost drivers of their business, including fixed and variable supply chain costs.

Fixed Cost

A cost that does not vary depending on production or sales volume.

Fixed Trade Funds

Flat Fees (A lump sum of cash that the manufacturer pays to the retailer to secure a display or ad. It can be viewed as the fee for renting the display space or ad space even though it is not a direct payment.)

Flat Fee

A lump sum of cash that the manufacturer pays to the retailer to secure a display or an ad. It can be viewed as the fee for renting the display space or for the ad space even though it is not a direct payment for either one.

Forward Buy

The purchase of an amount of product that exceeds immediate needs to take advantage of favorable pricing offered for promotions. In Customer Trade Planning, a number of weeks can be entered for which a retailer can forward buy. A forward buy allowance is only valid for promotions that also contain a case allowance.

Freight Allowance

The manufacturer provides the retailer with an allowance based on every case of product that the retailer collects from the manufacturer's warehouse using their own trucks.

Gross Margin

Net sales minus product cost.

Gross Margin%

Gross margin divided by net sales, expressed as a percentage.

Gross Margin Rule

Constraint requiring optimization results to be within a gross margin range.

Group ID

A system-generated grouping ID for ad slots that should appear together.

Imputed Package Price

Avg. Extended Price / Avg. Extended Price Total * Package Price, where Avg. Extended Price Total is the sum of average extended prices of all products in all product groups.

Incremental Cases

The number of cases that the retailer will sell from the promotion.

Incremental Mfg. Profit

Additional Mfg. Profit generated from the promotion.

Incremental Mfg. Revenue

Additional Mfg. Revenue generated from the promotion.

Incremental Units

The number of units that the retailer will sell from the promotion.

Incremental Value \$

Forecasts the promotion's incremental profit change and cost per promoted product value by stripping out everyday business results. It is often considered the true indicator of a promotion's worth.

KPI (Key Performance Indicators)

A set of measurements to assess success against predefined core objectives.

Labor Rate

An hourly labor cost including wages and benefits.

Last Digits

The digits in a price after the decimal point.

Lift $(\text{Promotion Volume} - \text{Baseline Volume}) / (\text{Baseline Volume}) \times 100\%$

Line Pricing

Assigning a group of similar products the same price, usually across flavors (for example, 6 packs of soda, or all boxes of JELL-O).

Location Group

Location groups (LGs) and location group classes (LGCs) are hierarchical groups of locations (markets) that can be selected for a promotion.

Location Group Class

Location groups (LGs) and location group classes (LGCs) are hierarchical groups of locations (stores and markets) that can be selected for a promotion.

Logistical Unit

The logistical unit 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.

Note: Logistical unit functionality is optional and may be turned off for some companies.

Magic Price

A price at which demand increases dramatically. For example, pricing a 6-pack of soda at \$1.99 may result in an unusually high demand vs. pricing it at \$2.00.

Markdown

The amount by which a price is reduced to boost sales.

Measurement Point

The **Measurement Point** is where a movement allowance is measured for calculating the allowances owed. For example, movement is usually measured at the register (Out of Store) for scan allowances.

Merchandising

The promotion of products, including coordinating production and marketing, and developing advertising, display, and sales strategies.

Mfg. Contribution Margin

Mfg. Gross Profit minus Trade Spending.

Mfg. Pre-Trade Cost (case)

The weighted Mfg. Product Cost prior to factoring in Trade Spending for one case of volume.

Mfg. Pre-Trade Cost (item)

The weighted Mfg. Product Cost prior to factoring in Trade Spending for one unit volume.

Mfg. Post-Trade Cost (case)

The weighted Mfg. Product Cost factoring in Trade Spending for one case of volume.

Mfg. Post-Trade Cost (item)

The weighted Mfg. Product Cost factoring in Trade Spending for one unit volume.

Mfg. Trade Cost % Change (item)

The % difference in Mfg. Cost due to Trade Spending.

Mfg. Trade Funds ROI (Return On Investment)

The change in Mfg. Gross Profit due to the promotion divided by the Trade Spending. The Mfg. Trade ROI is different from the Retailer Trade ROI, since allowances are subtracted in the manufacturer's Gross Profit calculations, and allowances are added in the retailer Gross Profit calculations.

Model Category

The category that is modeled. When the model category appears in IBM Omni-Channel Merchandising applications, it is usually labeled as "Mod" or "Modeling Category."

Model Status

The **Model Status** field indicates whether a product or category has been modeled and which model (demand group or promoted product group) was used.

Multibuy

Multibuy are another form of TPR that take the form of X for the price of Y (for example, 3 for the price of 2 = a TPR of 33%). Usually BOGOs, Multiples, and Multibuy will have a limit attached to them, such as 2 for \$4 with a maximum limit of 8 (the consumer can buy 8 for \$16, but they have to pay full price for the ninth item).

Multiples

Price statements in which multiple products are offered at a particular price, for example 2 for \$1.00.

Net Profit

Gross sales minus cost of goods sold, cost of operations, taxes, interest, and depreciation.

Net Profit%

Net profit divided by revenue.

Non-Performance Allowance

Additional funding from the manufacturer to the retailer that is not tied to promotions, such as freight allowance, backhaul allowance, spoilage allowance, and buying allowances.

Offer The proposal that a manufacturer makes to a retailer about the products that should be promoted, the manner in which these products should be promoted (for example, Ad, Display, or TPR), the time in which the products should be promoted, and the amount of money that the retailer will receive from the manufacturer (in a lump sum of cash, or as a saving off of the cost of the product, which are referred to as the allowances).

Off-Invoice

With an off-invoice, the amount of money that the retailer has earned from the manufacturer as a result of running a promotion is already taken off of the invoice amount. For example, if the manufacturer is invoicing the retailer for 10,000 cases of Tide at a cost per case of \$30, then the total invoice amount would be \$300,000. But if the retailer had run a promotion during the period that had a case allowance of \$3 per case then the retailer would have earned a total case allowance of \$30,000. Therefore, if this were an off-invoice payment, the invoice from the manufacturer would show \$300,000 minus \$30,000 for a total bill of \$270,000.

Optimization

The process of finding the best formula (for example, prices, product mix, and promotion plan) for achieving a given merchandising objective.

Optimization Scope

The aspects of the promotion that the optimization was allowed to change (the TPR, the products on ad/display, or both).

Other Media

Tactics such as unadvertised tactics and loyalty card tactics.

Overhead

All operational costs other than supply-chain costs.

Overhead Allocation

The amount of overhead costs attributed to a particular product.

Package

A group of products sold for a single price term that is different than if the products were purchased separately.

Panel Data

Tracking of individual consumer behavior over time to assess individual consumption patterns, impact of promotions, and switching behavior.

Pantry Loading

The act of stocking up on a product because it is on sale or promotion. Also known as Time Cannibalization or Stockpiling.

Percent Funding

Percent Funding is an allowance basis which calculates the allowance amount as a percentage of the promotion's TPR amount. It is not valid for TPR sub-types **Penny for Penny**, **Maintain Margin**, and **Percent Pass Thru**. If a valid TPR is not added, the allowance amount will be calculated as

zero. If your promotion contains multiple TPR performance details, the allowance amount will be calculated using the lowest promoted price/highest TPR value.

Performance Allowance

A discount that a retailer qualifies for after performing a promotion. There are two main types of performance allowances: Case Allowance (based on the amount of product that is shipped from the manufacturer to the retailer - shipment -based); and Scan Allowance (based on the amount of product bought by the consumer from the retailer - consumption-based).

Performance Detail

A type of merchandising strategy (ad/feature, display, TPR or EDLP). Price/cost overrides are also created as performance details.

Performance Detail Group

A combination of performance details that apply to the same products and locations. The date range for a performance detail can vary from the group's date range, but must occur within the date range of the group. For example, if you set your performance detail group to start March 1 and end March 28, it can contain an ad that runs from March 1-7 and a TPR that runs from March 1-28. A performance detail group can contain one or more performance details, but cannot contain more than one of the same type of performance detail. For example, a performance detail group can contain an ad, display, and TPR, but cannot contain two ads. Performance detail groups are often created using templates, which can have pre-defined sets of performance details and date ranges. Templates can be customized for each company's implementation.

Performance Period

The period of time that the promotion will run. It is the time when the promotion is performing, for example, when the product is on Display, Ad, or TPR.

Performance Type

Category managers sometimes have pre-defined performance types that they use on a repeated basis. For example, a performance type could consist of an Ad in weeks 1, 3 and 4, a display in weeks 2, 3 and 4, and a TPR in weeks 3 and 4.

POS Data

Point of Sale information that is collected by scanners upon check-out. POS Data shows the date, volume, and purchase price for all items sold.

Potential Avg. Quantity

The average of the minimum and maximum quantity values for a package.

Pre-Price

Products that have a price stamped on the packaging by the manufacturer.

Price Check

Confirmation of the selling price or retail price for a product.

Price Elasticity of Demand

The rate at which demand changes for a change in price. Change in demand divided by change in price.

Price Gap

The price difference between two similar products.

Price Image

The consumer perception of a retailer's prices and value.

Price Zone

Group of stores that always have the same prices across products.

Printed Media

Types of printed media such as flyers, inserts, and catalogs. These are subtypes of a tactic.

Product Costs

The wholesale or vendor/vendor/manufacture cost, that a retailer pays a manufacturer.

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 Groups

A group of products. Two types of product groups can be used with the Promotion solution. Dynamic product groups are automatically maintained based on filters, such as Brand and Size. Static product groups are manually maintained.

Product Pairs

A set of two products that have a promotional constraint established between them. For example, 'Dial White Bar Soap 3CT' should be priced at 90% of 'Dial Gold Bar Soap 3CT'.

Product Share

The ratio (in terms of percentage) of the revenue of an individual product (SKU) to the total revenue in one store.

Product Storage Type

The location in the store that houses a product. Values displayed in the application equals shelf (frozen or refrigerated).

Profit Revenue less variable costs, fixed costs, and ABC costs.

Promoted Product Group

A group of products typically promoted together. Often, a promoted product group (PPG) is comprised of products from the same product line. In the application, PPGs are like static product groups, but can contain products from multiple categories and cannot contain products that belong to any other PPG. These product groups can only be used in Trade Planning & Optimization and Promotion Optimization. PPGs are created and edited in the product groups area.

Note: PPG functionality is optional and may be turned off for some companies.

Promotion

A temporary product price adjustment and/or consumer benefit tied directly to the purchase of a product. For example, a promotion can be for all JELL-O gelatins to be on secondary placement (display) with no discount; one product in an ad with no display or discount; or a discount of a product or related products. A promotion can be manufacturer funded or not.

Promotion Description

A description of the promotion that usually indicates product name, SKU, and high-level terms.

Promo ID

A unique numeric identifier assigned to the promotion.

Promotion Group

Promotion groups are designed to be variations on a single promotion. They allow you to easily compare and contrast the impact of different price points, use of resources, etc. Promotion groups are useful in Customer Trade Planning for filtering related promotions in the **Promotion Manager** page, or for comparing members in the same group. A promotion group is generated automatically for each promotion you create. When duplicating a promotion, you can choose to keep the copy in the same promotion group as the original, or create a new promotion group for the copy.

Note: Within each promotion group, only one promotion for each retail account can be added to each of the calendars in Master Calendar, i.e., one promotion per retail account on the Team Calendar, and one promotion per retail account on the Public Calendar. All other promotions will show a workflow status of **Draft**.

PTR Price to Retailer. PTR is used to talk about the performance detail type **Current Price/List Cost Override**. This performance detail type is meant to simulate the effects of a permanent price or cost change on a category. A price/cost override will change the baseline values for a promotion and category plan, i.e., you will not see any incremental changes resulting from the new price or cost, as these changes will be included in the baseline values.

Release

Planned set of new functionality for IBM Omni-Channel Merchandising application suite that becomes available to all users on a specified date.

Replenishment Frequency

The number of times that store or DC inventory is replaced in a given time period.

Retail Price

The selling price or shelf price a consumer pays for a product.

Return on Trade Funds

The incremental value of the promotion (value of the promotion less everyday business) divided by trade dollars.

Revenue (Sales)

A net sales amount that is calculated as Price x Volume x Discount. By taking discount into account, total sales for the category can be forecasted, including an average level of promotion.

ROI Return on investment (after-tax operating income/ net (depreciated) book value of assets).

Sales Volume

The number of units of products sold in consumer or business-to-business transactions.

Same-Store Sales

Same-store comparisons measure the growth in sales, excluding the impact of newly opened stores.

Scan Allowance

The retailer only receives the allowance on products that are sold to the consumer during the deal period as indicated by scan data rather than

receiving the allowance on everything they buy from the manufacturer (case allowance). This removes the retailer's ability to stock up on excess inventory at the allowance price (effectively not allowing the retailer to do any forward-buy. This allowance is frequently used when Direct Store Delivery is required for a product, such as Coke or Pepsi). The retailer receives the allowance payment from the manufacturer after the promotion is over.

Scanner Data

POS data collected by a barcode scanner.

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. The term "scenario" may be synonymous with "promotion".

Seasonality

An underlying trend in consumer behavior based on the time of the year (for example, the impact of Thanksgiving holiday on the purchasing behavior of turkey).

Shelf Depth

The amount of space between the front of a shelf and the back of a shelf.

Shelf Height

The vertical clearance of a shelf.

Shelf Width

The horizontal clearance of a shelf.

Single Product Rules

Optimization constraints applied to one product or SKU.

Size Class

An attribute assigned to a product to place the product in a particular group based on size, volume, or weight. Size classes let you create size relationships between products so you can set rules for optimizations. The allowable size classes are XXXSmall through XXXLarge.

Size Family

Size Families let you further define subsets of a Size Class. For example, you might have 12oz. Coke in a Small Size Class, and 16oz. Coke in a Medium Size Class. To create a rule between the two, such as the 16oz. Coke is always more than the 12oz., but not more than double the price, you must create a Size Family named Coke. If you do not create that Size Family, the rule would end up applying to all products in the 12oz. and 16oz. Size Class.

Size Group

A classification of a group of products based on their relative sizes (for example, 0-8 oz = small, 9-12 oz = medium, >12 oz = large).

Size Rule

A predefined relationship between two similar products based on their respective volumes, weights or counts.

SKU Stock Keeping Unit. It is a number that a retailer assigns to a product.

Slotting Fees

The fees a retailer charges a manufacturer to insert or "slot" a new product onto shelves.

Spoilage Allowance

A spoilage allowance is usually used to compensate the retailer for spoilage of goods but is stated in terms of a dollar value per case of product that the retailer buys from the manufacturer (based on an average spoilage rate calculation that the manufacturer performs).

Store Groups

A set of individual stores that should be treated as one unit to achieve a business goal (for example, Region).

Store Traffic

The number of shoppers per unit of time.

Store Zones

A group of stores that share a set of prices. Also called Zones, Store Prize Zones, or Blocks.

Strategy

A set of pricing and promotion initiatives or activities that complement each other to achieve a particular business goal.

Substitute Products

Products that consumers perceive as having the same or similar utility. A substitute product is one that a consumer would purchase in lieu of another product without giving up a significant amount of perceived value.

Total Case Volume

The total number of cases being sold.

Total Mfg. Cost

The sum of the manufacturer costs for all products in the promotion.

Total Mfg. Profit

The total manufacturer profit for the promotion.

Total Mfg. Profit %

The total manufacturer profit as a % of Total Mfg. Revenue.

Total Mfg. Revenue

Retail Cost minus the sum of all allowances towards the Cost Of Goods.

Total Retail Gross Margin \$

The profit after factoring in Total Allowance.

Total Retail Gross Margin %

The profit % after factoring in Total Allowance.

Total Retail Revenue

The amount of sales in terms of dollars or local currency collected from consumer or business-to-business transactions.

Total Trade Funds

Funds offered by a manufacturer to a retailer for the promotion of a set of products, also referred to as Trade Spend.

Total Unit Volume

Units sold during the entire promotion time frame.

TPR Temporary Price Reduction. A reduction in the consumer price of a product for a temporary period of time. TPRs are often executed as BOGOs, Multiples, or Multibuy.

Trade Funds

Funds offered by a manufacturer to a retailer for the promotion of a set of products, also referred to as Trade Spend. These funds are usually allocated to pay for promotional activities on the part of the retailer, including Ads, Displays, and Temporary Price Reductions (TPR).

Trend An underlying relationship within a group of data points.

Two Product Rules

A constraint or rule relating two products together.

UEF User-entered forecast.

Unit of Measure (UOM)

The type of size measurement.

Unit Volume Lift %

The percentage of units that will be sold as a result of the promotion.

UPC Universal Product Code. A number and bar code that uniquely identify an individual consumer product issued by the manufacturer. The application standard is 14 digits.

Variable Cost

An expense that is associated with producing, stocking, or purchasing a SKU.

Variable Trade Funds

The sum of the performance allowances (such as Shipment and Consumption allowances) and Forward Buy Allowance.

Vendor/Manufacturer

The company that makes the goods that the retailer buys. The vendor/manufacturer considers three main merchandising activities when deciding how to plan their promotion calendars and construct their offers: Displays, Ads, Temporary Price Reductions (TPR).

Manufacturer Cost Change

Manufacturer-driven change in the purchase price of a product.

Volume

The number of units sold for a particular SKU.

Volume Rule

A constraint on the volume range for a given product or group of products within an optimization.

Warehouse Allowance

A slightly different version of the scan allowance. The retailer receives the allowance on all products that are shipped to the store from the retailer's warehouse during the event. This has the potential to encourage the retailer to stock more of the product in the store.

What-Ifs

Varying key assumptions to determine how the end results of an analysis differ.

Workflow Status

Workflow Status of a plan used for internal tracking purposes. A plan can have the following workflow statuses: **Draft**, **Complete** or **Approved**.

Zone Prices

Common prices implemented across multiple stores in an account.

Chapter 9. Report Metric Dictionary

The Report Metric Dictionary provides brief explanations of the fields found in various reports. 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.

Metric Name	Definition and Formula
# Ads	Number of Ad performance details in the promotion
% Current® Units	Percentage of saved total unit volume allocated to the location (in the Location grid) or the product (in the Product grid)
% to Include in Add'l Value Calc	Percentage of allowance that is included in Additional Value
% to Include in COGS	Percentage of allowance that is included in retail cost of goods
% UEF Units	Percentage of entered (UEF) total unit volume allocated to the location (in the Location grid) or the product (in the Product grid)
52 Wk Avg Units	Historical sales activity period
Ad ACV Type	Indicates the ACV percentage (Historical Low, Historical Mean, Historical High) selected for ad prediction
Accrual Rate (\$/case)	Dollar amount per case shipped that will be available for trade spend
Accrual Rate per EQC (\$/case)	Dollar amount per equivalent case that will be available for trade spend. This metric is only available if your company uses equivalent cases for accrual funding.
Actual TPR	Price reduction on product
Ad	Indicates (Yes/No) whether the performance detail is an Ad
Ad Duration	Number of distinct weeks an Ad performance detail occurs in the promotion
Add ACV %	For all products in the promotion time period, percentage of stores that executed the ad
Additional Value	<p>The sum of all allowances and flat fees allocated toward Additional Value; this allocation is set on the Allowances page when creating a new promotion.</p> <p>The default formula is shown below. This formula is only valid if you have not modified the allowance allocations.</p> <p><i>Flat Fee + Forward Buy + Non-Performance Allowances</i></p>

Metric Name	Definition and Formula
Allowance %	Amount spent on allowance as a percent of average gross unit cost $((Average\ Unit\ Cost - Average\ Unit\ Allowance) / Average\ Unit\ Cost) * 100\%$
Allowance % of Cost	Amount spent on allowance as a percent of case or unit cost $(Allowance\ Amount / Cost) * 100\%$
Allowance Required	Indicates whether the promotion requires an allowance for funding
Allowance Sync	Indicates whether the allowances shown on a promotion are in sync with the offer's allowances in the system. This field is only valid for companies who have implemented .
Allowances	Funding given by a manufacturer to a retailer, to support promotional activity or business requirements. This field provides details on all allowances included in the promotion.
Amount	Allowance monetary value
Amount (Add'l Info)	Percentage of wholesaler markup or warehouse markup, or forward buy time allowed
Attribute1	User-entered comments for a particular promotion, visible in the Team and Public Calendar
Avg %	Average of product/location-level actual pass-through values for the promotion
Avg Baseline Price	Average non-promoted price for each product
Avg Discount %	Average discount for promoted products only; was previously identified as Avg TPR %
Avg Discount \$	Average discount for promoted products
Avg Gross COGS	Average gross cost of goods sold for a single product (in the All Products report) or all products in the category (in Category Plan Manager)
Avg Net COGS	Average net cost of goods sold for each product
Avg Promoted Price	Average promoted price for each product
Avg TPR	Average price of each product when on promotion
Avg TPR %	Average TPR for each product (as a percentage of the average non-promoted price)

Metric Name	Definition and Formula
Base Funding	Base amount available for accrual funding; formula will depend on whether the manufacturer calculates accrual funds as a percentage of revenue or a dollar amount per case <i>Mfg. Gross Revenue (Shipped) * Accrual Rate (% or \$/case)</i>
Base Revenue	Total MFG base line revenue for the promoted products across the promotion period
Baseline	Value for the category with no promotion
Baseline Benchmark	Predicted results with no promotion activity
Baseline Case Volume	Forecasted case volume for all products when not on promotion; forecasted results include PTR performance details
Baseline Change %	Forecasted percentage change when on promotion
Baseline COGS - Avg	Average cost of goods sold when not on promotion
Baseline COGS - Low	Lowest cost of goods sold when not on promotion
Baseline EQC	Forecasted equivalent cases or "statistical cases" sold when not on promotion
Baseline Equiv. Volume	Forecasted equiv. volume for all products when not on promotion; forecasted results include PTR performance details
Baseline GM - Avg	Average net profit with no promotion
Baseline GM\$ - Avg	Average net profit (as a dollar amount) with no promotion
Baseline Gross Margin	Net profit with no promotion for all products (sum) in each promotion (in the All Promotions report) or each product (in the All Products report)
Baseline Mfg. Gross Margin	Gross margin to manufacturer with no promotion <i>Baseline Mfg. Gross Revenue - Baseline Mfg. Gross Cost</i>
Baseline Mfg. Gross Revenue	Gross revenue to manufacturer with no promotion <i>Baseline Unit Volume * Unit Cost</i>
Baseline Mfg. Revenue	Gross revenue to manufacturer with no promotion <i>Baseline Unit Volume * Unit Cost</i>
Baseline Price - Avg	Average non-promoted price for each product
Baseline Price - High	Highest non-promoted price for each product

Metric Name	Definition and Formula
Baseline Retail Revenue	Forecasted revenue to retailer for category or product with no promotions
Baseline Revenue	Forecasted revenue for all products when not on promotion; forecasted results include PTR performance details
Baseline Unit Volume	Forecasted unit volume for all products when not on promotion
Baseline Volume	Forecasted unit volume for all products when not on promotion; forecasted results include PTR performance details
Basis	How the allowance is calculated
Batch ID	System-generated number created upon importing a file of promotions; one Batch ID will be assigned to all promotions that are imported in the same file
Brand	Brand name of product
Calculation Context	This field can display one of four possible values: N/A, Without promotion context, With promotion context, and Promotion context on EDLP
Calculation Status	Indicates whether a promotion is Uncalculated, Predicted, etc.
Case Pack	Product's case pack size
Case Pack Override	Field in which you can override the default case pack size for a product/logistical unit, or view an already-entered override
Case Volume Lift %	Forecasted percentage increase from baseline case volume for each product or all promoted products
Category	Indicates the category to which the product, promotion or multi-entry plan belongs or the category for which the event is valid
Category Case Volume	Forecasted volume of cases sold for all products in the category
Category Case Volume Lift %	Forecasted percentage increase or decrease in volume of cases sold for all products in the category
Category Plan ID	Unique system-generated number for each category plan
Category Plan Run ID	System-generated number that is created each time a user predicts a category plan; if a category plan that has already been predicted is re-predicted, it will be assigned a new Run ID.
Category Results Incremental	Displays the differential between baseline values and promoted values for the metric in the corresponding row
Category Results Incremental %	Displays the differential percentage between baseline values and promoted values for the metric in the corresponding row

Metric Name	Definition and Formula
Category Results Total	Displays the corresponding value for all products in the promotion; this column applies to all specific metric rows
Category Unit Volume	Forecasted units sold for all products in the category
Category Unit Volume Lift %	Forecasted increase or decrease in units sold for all products in the category
Code	Promotion or category plan code; user-entered descriptive value, subject to each company's naming conventions
Comments	User-entered comments
Commit Status	Indicates whether the category plan has been committed to the Master Calendar or is in the process of being committed, i.e. Exported and Exporting
Complete	Indicates whether a promotion is complete, i.e. not missing necessary information
Config Qty	Number of units per case for the logistical unit
Consumer Unit Code	Unique code that identifies a single product as sold to a consumer
Consumer Unit Name	Descriptive name that identifies a single product as sold to a consumer
Contribution %	Percentage of case metrics that should be weighted to the particular product in a shipper or displayer case
Contribution % Override	Override value entered for the percentage of case metrics that should be weighted to the particular product in a shipper or displayer case
Contribution Margin	Manufacturer's contribution margin, as a dollar amount <i>Mfg. Gross Margin \$ - Total Trade Spend \$</i>
Cost Per \$1 Contribution Margin	<i>Total Trade Spend / Mfg. Contribution Margin</i>
Cost Per \$1 Revenue	<i>Total Trade Spend / Incremental Revenue</i>
Cost Per Incremental	<i>Total Trade Spend / Incremental Revenue</i>
Cost Per Incremental Case	Average promotion cost for each promoted case
Cost Per Incremental Equiv	Average promotion cost for each equivalent unit
Cost Per Incremental Unit	Average promotion cost for each promoted unit
Coupon/Rebate Duration	Length of time the coupon/rebate is valid
Coupons/Rebates #	Number of Coupon/Rebate performance details on the category plan
Created By	User who created the event, promotion, multi-entry plan or category plan

Metric Name	Definition and Formula
Created On	Date on which the event, promotion, multi-entry plan or category plan was created
Current Net Per Case Cost	Net per case cost calculated from the saved case volume for the logistical unit <i>Per Case Cost - Per Case Allowance</i>
Current Per Unit Allowance	Allowance per unit (UPC) calculated from the saved case volume for the logistical unit
Current Unit Volume	Unit (UPC) volume calculated from the saved case volume for the logistical unit <i>Case Volume * Config Qty</i>
Current Units	Saved total unit volume for the promoted product (on the Product grid) or for all promoted products at the location (on the Location grid)
Custom Metric 1	This is a custom field which is defined by the customer.
Custom Metric 2	This is a custom field which is defined by the customer.
Custom Metric 3	This is a custom field which is defined by the customer.
Dead Net Cost	Cost of an item after all allowances have been accounted for (both COGS and Additional Value allowances)
Default Case Pack Size	Default case pack size for a product/logistical unit
Demand Group	Indicates the demand group to which the product has been attached
Description	Promotion, promotion group, multi-entry plan, category plan or product description; user-entered descriptive value, subject to each company's naming convention
Display	Indicates (Yes/No) whether the promotion includes a Display performance detail
Display ACV Type	Indicates the ACV percentage (Historical Low, Historical Mean, Historical High) selected for display prediction
Display Duration	Number of distinct weeks a Display performance detail occurs in the promotion
Displays #	Number of displays on the category plan
DM Allowance Type	Displays the allowance type selected for the offer from which the promotion was generated
DM Performance Type	Displays the performance type selected for the offer from which the promotion was generated

Metric Name	Definition and Formula
Dominant Price	High-level price set for a performance detail group; this price may be versioned at the location group or individual location (store/market) level
DT Total Unit Volume	Forecasted unit volume; user can override this value
EDLP Incremental Case Volume	Forecasted case volume increase or decrease for products sold on an EDLP
EDLP Incremental Equivalent Volume	Forecasted equivalent unit volume increase or decrease for products sold on an EDLP
EDLP Incremental Mfg EQC Volume	Forecasted equivalent or “statistical” case volume increase or decrease for products sold on an EDLP
EDLP Incremental Unit Volume	Forecasted unit volume increase or decrease for products sold on EDLP
Effective Accrual Rate (%)	Percentage of manufacturer’s revenue that will be available for trade spend
End Date	End date of latest performance detail in the promotion, category plan, multi-entry plan or event
EQC Factor	A user assigned factor that is used to create equivalent case information from physical case information. This allows you to compare different sized products on an equivalent basis. The EQC Factor can be edited in Data Maintenance.
Equiv Volume % Lift	Forecasted equivalent volume percentage increase or decrease for the product or category
Equiv Volume Lift %	Volume lift (as a percentage of the baseline value) of equivalent units during the promotion
Event	Indicates the name of the event linked to the multi-entry plan, if one is linked
Event Type	Type of event, i.e. Ad, Display, etc., also called Type
External ID	Promotion identifier from external system; for example: offers imported from may show the Offer # as External ID
Feature ACV %	For all products in the promotion time period. Percentage of stores that executed the display
Fixed Trade Funds	Sum of all fixed trade funds (Flat Fee) over promoted products; at the promoted products level, the fixed trade funds are distributed proportionally to revenue, if possible, if not, then by volume, if not either, then split evenly between products; Value of non-performance-related trade funds available for the promotion
Forecast	Total unit volume (forecasted or UEF) for all promoted products

Metric Name	Definition and Formula
Forecast Baseline	Baseline forecast planned
Forecast Incremental	Incremental forecast planned
Forecast Sales	Total forecast Planned
Forward Buy	Number of weeks of Forward Buy included in the Promotion planning.
Forward Buy Trade Funds	Value of trade funds allocated for forward-buying for the promotion <i>Case Allowance * Average Baseline Weekly Volume * Number of Weeks</i>
Funding Adjustments	Amount entered manually to adjust Total Accrual Funds for a category plan
Funding Balance	Remaining trade funds available for accrual funding <i>Total Accrual Funds - Total Estimated Trade Spend</i>
Future COGS - Avg	Average cost of goods sold for each product at a future price point
Future GM% - Avg	Average gross margin (as a percentage of revenue) for each product at a future price point
Future GM\$	Gross margin (as a dollar amount) for each product at a future price point
Future GM\$ - Avg	Average gross margin (as a dollar amount) for each product at a future price point
Future Price - Avg	Future price of each product
Future Price - Effective Date	First day when future price of product is effective
Gross COGS Per Equiv.	Forecasted gross cost of goods sold for each equiv. promoted product
Gross COGS Per Unit	Forecasted gross cost of goods sold for each promoted product
Gross Cost of Goods	Gross cost of goods sold for the product or category
Gross Margin	Net profit as a dollar amount <i>Revenue - Cost</i>
Gross Margin %	Net profit as a percentage of revenue <i>((Revenue - Cost) / Revenue) * 100%</i>
Gross Margin % (Category Results -Incremental %)	Percentage increase or decrease in Gross Margin % for the total unit volume of the category <i>(Incremental Gross Margin % / Baseline Gross Margin %) * 100%</i>
Gross Margin % (Category Results -Incremental)	Net profit as a percentage of revenue for the incremental unit volume of the category <i>((Revenue - Cost) / Revenue) * 100%</i>

Metric Name	Definition and Formula
Gross Margin % (Category Results -Total)	Net profit as a percentage of revenue for the total unit volume of the category <i>((Revenue - Cost) / Revenue) * 100%</i>
Gross Margin % (Promoted Products -Incremental %)	Percentage increase or decrease in Gross Margin % for the total unit volume of promoted products <i>(Incremental Gross Margin % / Baseline Gross Margin %) * 100%</i>
Gross Margin % (Promoted Products -Incremental)	Net profit as a percentage of revenue for the incremental unit volume of promoted products <i>((Revenue - Cost) / Revenue) * 100%</i>
Gross Margin % (Promoted Products -Total)	Net profit as a percentage of revenue for the total unit volume of promoted products <i>((Revenue - Cost) / Revenue) * 100%</i>
Gross Margin % Change	Forecasted increase or decrease in net profit for each product during a promotion <i>Predicted Incremental Gross Margin / Baseline Total Gross Margin \$</i>
Gross Margin \$	Net profit as a dollar amount <i>Revenue - Cost</i>
Gross Margin \$ (Category Results -Incremental %)	Forecasted increase or decrease in net profit (as a dollar amount) for the category <i>(Incremental Gross Margin \$ / Baseline Gross Margin \$) * 100%</i>
Gross Margin \$ (Category Results -Incremental)	Net profit (as a dollar amount) for the incremental unit volume of the category <i>Revenue - Cost</i>
Gross Margin \$ (Category Results -Total)	Net profit (as a dollar amount) for the total unit volume of the category <i>Revenue - Cost</i>
Gross Margin \$ (Promoted Products -Incremental %)	Forecasted increase or decrease in net profit (as a dollar amount) for the promoted products <i>Revenue - Cost</i>
Gross Margin \$ (Promoted Products -Incremental)	Net profit (as a dollar amount) for the incremental unit volume of promoted products <i>Revenue - Cost</i>
Gross Margin \$ (Promoted Products -Total)	Net profit (as a dollar amount) for the total unit volume of promoted products <i>Revenue - Cost</i>
Has Ad	Indicates whether a promotion or promoted product has an Ad performance detail

Metric Name	Definition and Formula
Has Coupon/Rebate	Indicates whether a promotion or promoted product has a Coupon/Rebate performance detail
Has Display	Indicates whether a promotion or promoted product has a Display performance detail
Has EDLP	Indicates whether a promotion or promoted product has an EDLP performance detail
Has Null COGS	Cost of goods is zero
Has Open PD1	Indicates whether the promotion includes a custom performance detail
Has Open PD2	Indicates whether the promotion includes a custom performance detail
Has Price, COGS, or Both Chg	Indicates whether a promotion or promoted product has a change in price and/or cost of goods sold
Has Sign	Indicates (Yes/No) whether the Sign value (Attribute 3) was checked when the promotion was created
Has TPR	Indicates whether a promotion, promoted product or event has a TPR performance detail
Has UEF	Indicates whether the promotion has user-entered forecasts, i.e., a user has manually entered forecasts
ID	Unique auto-generated integer for each category plan; also called Category Plan ID
In Package	Indicates whether a product is included in a package
Included in Calc	Indicates whether an allowance will be included in promotion forecasts and calculations; if the allowance is overlapping from a different promotion, you can uncheck the checkbox in this field to exclude the overlapping allowance from the promotion calculations.
Incr. Case Volume	Forecasted number of cases sold above baseline for the category or product <i>Total Case Volume - Baseline Case Volume</i>
Incr. Equiv Volume	Forecasted number of equivalent units sold above baseline for the category or product <i>Total Equiv. Volume - Baseline Equiv. Volume</i>
Incr. Retail Revenue	Forecasted revenue to retailer above baseline for the category or product <i>Total Retail Revenue - Baseline Retail Revenue</i>
Incremental Case Volume	Forecasted number of cases sold above baseline for the category or product <i>Total Case Volume - Baseline Case Volume</i>

Metric Name	Definition and Formula
Incremental Equiv Volume	Forecasted number of equivalent units sold above baseline for the category or product <i>Total Equiv. Volume - Baseline Equiv. Volume</i>
Incremental Gross Margin	Forecasted gross margin increase or decrease for a promotion <i>Total Gross Margin - Baseline Total Gross Margin</i>
Incremental Mfg. Contribution Margin	Forecasted manufacturer contribution margin increase or decrease for a promotion or product <i>Mfg. Contribution Margin - Baseline Total Mfg. Profit</i>
Incremental Mfg. EQC	Forecasted equivalent case or “statistical case” volume increase or decrease for a promotion or product <i>Incremental Cases * EQC Factor</i>
Incremental Mfg. Gross Margin	Gross margin to manufacturer above baseline profit <i>Total Mfg. Gross Margin - Baseline Total Mfg. Gross Margin</i>
Incremental Mfg. Gross Revenue	Gross revenue to manufacturer above baseline revenue <i>Total Mfg. Revenue - Baseline Total Mfg. Revenue</i>
Incremental Mfg. Revenue	Revenue to manufacturer above baseline revenue <i>Total Mfg. Revenue - Baseline Total Mfg. Revenue</i>
Incremental Mfg. Trade ROI	When a promotion contains TPR and EDLP tactics, this metric shows the incremental return of the TPR tactic <i>(Total Mfg. Contribution Margin (\$) - Baseline Mfg. Contribution Margin (\$)) / (Total Trade Spend - Baseline Trade Spend)</i>
Incremental Revenue	Revenue increase or decrease for a promotion (sum of revenue for all promoted products) or an individual product <i>Total Revenue – Baseline Total Revenue</i>
Incremental Unit Volume	Unit volume increase or decrease for a promotion (sum for all promoted products), a product, or a promoted product <i>Total Unit Volume - Baseline Unit Volume</i>
Incremental Value %	Percent increase in incremental value due to promotion

Metric Name	Definition and Formula
Incremental Value \$	<i>Incremental Net Profit + Additional Value</i>
Line	Line group of product
Line Description	Description of line group
Location Group	Location group(s) where the promotion or allowance is valid
Lock Status	Indicates whether a promotion is locked (non-editable) or unlocked
Logistical Unit Code	Unique code that identifies a group of the same products
Manufacturer	Manufacturer/Vendor of product
Max %	Highest product/location-level actual pass-through value for the promotion
Mfg. Baseline EQC	Forecasted equivalent cases or "statistical cases" shipped to retailer when not on promotion; forecasted results include PTR performance details <i>Baseline Case Volume* EQC Factor</i>
Mfg. Contribution Margin	Manufacturer's contribution margin, as a dollar amount <i>Mfg.Gross Margin \$ - Total Trade Spend \$</i>
Mfg. Contribution Margin %	Manufacturer's contribution margin, represented as a percentage <i>(Mfg. Contribution Margin \$ / Mfg. Gross Margin) * 100%</i>
Mfg. Contribution Margin \$	Manufacturer's contribution margin, as a dollar amount <i>Mfg.Gross Margin \$ - Total Trade Spend \$</i>
Mfg. EQC	Equivalent (or "statistical") case volume <i>Physical Cases * EQC Factor</i>
Mfg. Fixed Trade Funds	Amount of fixed trade funds (or "flat fee allowances") spent
Mfg. Forward Buy Trade Funds	Amount of trade funds spent on forward buy allowance <i>Case Allowance Per Week * Forward Buy Weeks</i>
Mfg. Gross Margin	Manufacturer Net Profit <i>Total Mfg. Revenue - Total Mfg. Cost</i>
Mfg. Gross Margin %	Percentage of manufacturer's gross revenue that is profit
Mfg. Gross Margin % Change	Percentage increase or decrease in gross profit to manufacturer with the promotion <i>(Predicted Incremental Mfg. Gross Margin / Baseline Mfg. Gross Margin \$) * 100%</i>
Mfg. Gross Margin % Per EQC	Profit (as a percentage of sales) per equivalent or "statistical" case

Metric Name	Definition and Formula
Mfg. Gross Margin \$ Per EQC	Profit (in dollars) per equivalent or "statistical" case <i>Mfg. Gross Margin / EQC</i>
Mfg. Gross Margin Per EQC	Gross margin to manufacturer per equivalent (or "statistical") case <i>Mfg. Gross Margin / EQC</i>
Mfg. Gross Revenue	Gross revenue to manufacturer <i>Predicted Unit Volume * Unit Cost</i>
Mfg. Gross Revenue (Shipped)	Gross revenue to manufacturer used for accrual funding <i>Mfg. Gross Revenue * Shipment Conversion + Revenue Adjustment</i>
Mfg. Gross Revenue % Change	Percentage increase or decrease in gross revenue to manufacturer with the promotion
Mfg. Gross Revenue Per EQC	Gross revenue to manufacturer per equivalent (or "statistical") case <i>Total Mfg. Sales / EQC</i>
Mfg. Market Share - Units	Manufacturer's units sold during promotion period as a percentage of retailer's total units sold in the category. If Calculation Context is set to "No other promotions," this percentage will be overstated
Mfg. Post-Trade Cost (case)	Cost for a case of product after accounting for allowance cost <i>(Total Mfg. Cost + Total Trade Funds) / Predicted Case Volume</i>
Mfg. Post-Trade Cost (item)	Cost for a product after accounting for allowance cost <i>(Total Mfg. Cost + Total Trade Funds) / Predicted Unit Volume</i>
Mfg. Pre-Trade Cost (case)	Cost for a case of product with no allowances <i>Total Mfg. Cost / Predicted Case Volume</i>
Mfg. Pre-Trade Cost (item)	Cost for a product with no allowances <i>Total Mfg. Cost / Predicted Unit Volume</i>
Mfg. Revenue	Manufacturer's gross income
Mfg. Revenue % Change	Percentage increase or decrease in revenue to manufacturer with the promotion
Mfg. Total Case Volume (Shipped)	Manufacturer's case volume used for accrual funding <i>Mfg. Case Volume * Shipment Conversion</i>

Metric Name	Definition and Formula
Mfg. Total Trade Funds	Total trade funds spent (includes forecasted variable trade funds and fixed trade funds) <i>Fixed Trade Funds + Performing Trade Funds + Forward Buy Trade Funds</i>
Mfg. Trade Cost % Change	Percentage increase or decrease between the Pre-Trade Cost and the Post-Trade Cost <i>(Mfg. Post-Trade Cost - Mfg. Pre-Trade Cost) / Mfg. Pre-Trade Cost</i>
Mfg. Trade Funds Per EQC	Trade funds spent per equivalent (or "statistical") case sold <i>Mfg. Total Trade Funds / EQC</i>
Mfg. Trade Funds Per Incremental EQC	Trade funds spent per equivalent (or "statistical") case sold above the forecasted baseline volume <i>Mfg. Total Trade Funds / Incremental EQC</i>
Mfg. Trade Funds ROI	Return on investment to manufacturer for total trade funds spent <i>(Incremental Mfg. Profit - Total Trade Funds) / Total Trade Funds</i>
Mfg. Variable Trade Funds	Forecasted amount of variable trade funds spent <i>Performing Trade Funds + Non Performing Trade Funds</i>
Mfgr. Category Case Vol	Forecasted cases sold for all products that belong to the manufacturer in the category; a subtotal of the retailer's total Category Case Volume
Mfgr. Category Case Volume Lift	Forecasted cases sold above baseline for all products that belong to the manufacturer in the category
Mfgr. Category Unit Volume	Forecasted units sold for all products that belong to the manufacturer in the category; a subtotal of the retailer's total Category Unit Volume
Mfgr. Category Unit Volume Lift	Forecasted units sold above baseline for all products that belong to the manufacturer in the category
Min %	Lowest product/location-level actual pass-through value for the promotion
Model Status	Indicates whether the products in the promotion are modeled For CP, also indicates whether a category uses the demand group or promoted product group model
Modified By	User who last modified the promotion, event, or category plan

Metric Name	Definition and Formula
Modified On	Date on which the promotion, event, or category plan was last modified
Multi-Entry Name	Descriptive value for the multi-entry plan, subject to each company's naming conventions
Multi-Entry Plan ID	Displays the ID number of the multi-entry plan from which promotion was generated, if applicable
Name	Descriptive value for the product, promotion, promotion group, or category plan, subject to each company's naming conventions
Name (Add'l Info)	Additional allowance type
Net COGS Per Equiv.	Forecasted net cost of goods sold for each equiv. promoted product
Net COGS Per Unit	Forecasted net cost of goods sold for each promoted product
Net Cost of Goods	Net cost of goods for all products in the category, including allowances
Net Per Case Cost	Per case cost after allowances for the logistical unit <i>Per Case Cost - Per Case Allowance</i>
Net Per Case Cost Change	Difference between net per case cost calculated from the saved case volume and per case cost calculated from the entered case volume for the logistical unit <i>New Net Per Case Cost - Current Net Per Case Cost</i>
Net Per Unit Cost	Per unit cost after allowances for the logistical unit <i>Per Unit Cost - Per Unit Allowance</i>
Net Revenue Lift	Percentage of incremental revenue over baseline
New Net Per Case Cost	Net per case cost calculated from the entered case volume for the logistical unit <i>Per Case Cost - Per Case Allowance</i>
New Per Unit Allowance	Allowance per unit (UPC) calculated from the entered case volume for the logistical unit
New Unit Volume	Unit (UPC) volume calculated from the entered case volume for the logistical unit
Non Performing Trade Funds	All trade funds not associated with a performance detail <i>Non-Performance Allowance per item * Predicted Sales Volume</i>
Non Promoted	Value for non-promoted products in the category

Metric Name	Definition and Formula
Num Ads	Number of Ad performance details on the promotion
Num Displays	Number of Display performance details on the promotion
Num Others	Number of Other performance details on the promotion
Num TPRs	Number of TPRs performance details on the promotion
Offer Status	Status of a promotion's corresponding offer in , i.e. Submitted, Modified, etc. If this field displays Error, the offer was not able to successfully sync with Promotion Optimization because of an integration error.
OTB	Indicates if the logistical unit is an OTB (one-time buy)
Other	Indicates (Yes/No) whether the promotion includes an Other-type performance detail
Override Status	Indicates whether the forecasted units value has been overridden by a user
Payment Unit Volume	The sum of Promoted Unit Volume and Forward Buy Unit Volume
Per Case Allowance	Allowance amount per case for the logistical unit
Per Case Cost	Cost per case for the logistical unit <i>Per Unit Cost * Config Qty</i>
Per Unit Allowance	Allowance amount per unit (UPC)
Per Unit Allowance Change	Difference between per unit allowance calculated from the saved case volume and per unit allowance calculated from the entered case volume for the logistical unit <i>New Per Unit Allowance - Current Per Unit Allowance</i>
Per Unit Cost	Retail cost per sellable unit (UPC) for the logistical unit (case, shipper, etc.) <i>Case Cost / Case Pack</i>
Performance Allowance %	Percentage cost of an item that is offered (to the retailer) as an allowance
Performance Detail Group ID	System-generated number assigned to each individual performance detail group
Performance Details	Lists product-specific performance details for the selected promotion.
Performance Type	Types of performance details on the promotion
Performing Trade Funds	Total trade funds associated with a performance detail for the category plan <i>Performance Allowance per item * Predicted Sales Volume</i>

Metric Name	Definition and Formula
Plan Status	Indicates the status of a multi-entry plan
Predicted Promotion	Predicted results with promotion activity
Priority	Attribute 2 indicator; configurable by your company; (your company may not use this field)
Product	Product name
Product Incremental	Incremental product sales for a promoted product in the promotion
Product Baseline	Baseline product sales for a promoted product in the promotion
Product ID	Unique system-generated number for each product used for tracking
Product Key	Product UPC
Product Name	Name of product
Product Sales	Total product sales for a promoted product in the promotion
Product Status	Set as either active or discontinued. Active indicates that the product will be included in the forecast. A discontinued product cannot be included in a promotion and must be removed from the list of promoted products.
Products	Products for which the performance detail or allowance is valid; Only one product will be listed on the report. You must View Details in order to see the entire list of valid products.
Promo Detail Type	Performance detail type, i.e. Ad, Display, TPR, Coupon, etc.
Promo ID	Unique system-generated number for each promotion
Promo Type	Indicates the promotion type if the performance detail group was created using a specialized promotion type, i.e., EDLP, Current Price/List Cost Override, or PTR (Price to Retailer)
Promo vs. Category Plan	Indicates (by displaying a yellow triangular icon) that a promotion's performance dates do not overlap with the category plan dates
Promos #	Number of promotions included in the category plan
Promoted GM% - Avg	Gross margin (as a percentage of revenue) for product on promotion
Promoted GM\$ - Avg	Gross margin (as a dollar amount) for product on promotion
Promoted Incremental Case Volume	Forecasted case volume increase or decrease for promoted products (non-EDLP) <i>Total Case Volume - Baseline Case Volume - EDLP Incremental Volume</i>

Metric Name	Definition and Formula
Promoted Incremental Equivalent Volume	Forecasted equivalent unit volume increase or decrease for promoted products (non-EDLP)
Promoted Incremental Mfg EQC Volume	Forecasted equivalent or "statistical" case increase or decrease for promoted products (non-EDLP)
Promoted Incremental Unit Volume	Forecasted unit volume increase or decrease for promoted products (non-EDLP) <i>Total Unit Volume - Baseline Unit Volume - EDLP Incremental Volume</i>
Promoted Price - Avg	Average promoted price for product
Promoted Volume Lift (%)	Promoted incremental lift (lift generated from TPR events only) indexed against promoted base volume <i>(Total Promoted Unit Volume - Baseline Promoted Unit Volume) / Baseline Promoted Unit Volume</i>
Promotion Attribute	Attribute 1 indicator; configurable by your company; (your company may not use this field)
Promotion Baseline	Baseline Promotion Sales for products in the promotion
Promotion Code	User-entered descriptive value, subject to each company's naming convention. If you are a retailer who has implemented the Offer Synchronization Webservice, this field is used to display a promotion's corresponding Offer #.
Promotion Description	User-entered descriptive value, subject to each company's naming conventions
Promotion End Date	End date of latest performance detail in the promotion.
Promotion Group ID	Unique system-generated number for the promotion group
Promotion Group Name	User-entered descriptive value; subject to each company's naming conventions
Promotion Incremental	Incremental Promotion Sales for the products in the promotion
Promotion Name	User-entered descriptive value; subject to each company's naming conventions
Promotion Sales	Total Promotion Sales for aggregated for products in the promotion
Promotion Start Date	Start date of earliest performance detail in the promotion
PTRs #	Number of PTRs (Current Price/List Cost Override performance details) included in the category plan

Metric Name	Definition and Formula
Purchase Cases	Number of cases (logistical unit) purchased by the retailer; you can override this value for each logistical unit.
Purchase Units	Number of individual units purchased by the retailer; this is calculated using Purchase Cases. <i>Purchase Cases * Case Pack</i>
Reg Retail Per Unit	Regular retail price per unit
Retail Gross Margin	Retailer Net Profit
Retail Gross Margin %	Net profit to retailer (as a dollar amount) for the category
Retail Gross Margin \$	Net profit to retailer (as a percentage of revenue) for the category
Retail Revenue	Retailer Gross Income; Total revenue to retailer for category plan
Retail Revenue % Change	Forecasted percentage increase or decrease in revenue to retailer for category or product
Retailer	Shows the retailer for which the promotion is valid
Revenue	Total revenue for category plan <i>Price * Unit Volume</i>
Revenue (Category Results - Total)	Total revenue for the category <i>Price * Total Unit Volume</i>
Revenue (Category Results -Incremental %)	Percentage increase or decrease in revenue for the category <i>(Incremental Revenue / Baseline Revenue) * 100%</i>
Revenue (Category Results -Incremental)	Incremental revenue for the category <i>Price * Incremental Unit Volume</i>
Revenue (Promoted Products -Incremental %)	Percentage increase or decrease in revenue for all promoted products <i>(Incremental Revenue / Baseline Revenue) * 100%</i>
Revenue (Promoted Products -Incremental)	Incremental revenue for all promoted products <i>(Promoted Price * Total Unit Volume) - (Regular Price * Baseline Unit Volume)</i>
Revenue (Promoted Products -Total)	Total revenue for all promoted products <i>Promoted Price * Total Unit Volume</i>
Revenue % Change	Percentage increase or decrease in revenue for each product or promotion

Metric Name	Definition and Formula
Run ID	System-generated number that is created each time a user predicts or optimizes a promotion or category plan; if a promotion or category plan that has already been predicted is re-predicted, it will be assigned a new Run ID.
Sales \$ Per EQC	Total manufacturer sales per equivalent or "statistical" case
Seasonal	Indicates if the logistical unit is seasonal
Size	Amount of product in one item
Size Class	Product size class (i.e. Small, Medium, Large, X-Large, etc.)
SKU	SKU identifier for the product
Source	Indicates how the promotion entered the database, i.e. Imported, etc.
Source ID	For promotions which were created by copying existing promotions, this field displays the Promo ID of the original promotion. For promotions which were not copied, this field displays the promotion's Promo ID.
Special Package	Indicates if the logistical unit is a special package
Status	Indicates whether the category plan has been committed to the Master Calendar or is in the process of being committed, i.e. Exported and Exporting
Status Indicator	At the promotion group level - indicates whether the promotion group has conflicts relating to the Public Calendar and Team Calendar in Master Calendar At the promotion level - indicates the promotion contains an incomplete PPG or consumer unit
Store Number	Number assigned to a store by the retailer and used for tracking purposes
Sub-Type	Specifies the specific type of promotion in further detail; Attribute 1 field indicator; configurable by your company; (your company may not use this field)
Template	Name of the template used to create the performance detail group
Total Accrual Funds	Total amount available for trade funding <i>Base Funding + Funding Adjustment</i>
Total ACV%	Percentage of stores that executed the performance detail for all products in the promotion time period

Metric Name	Definition and Formula
Total Allowance	Total allowance amount <i>UEF * Per Case Allowance</i>
Total Case Volume	Forecasted total case volume for each product in the category (in the All Products report), all promoted products in each promotion (in the Promotion tab: All Promotions report) or all products in the category (in Category Plan Manager)
Total Equiv Volume	Forecasted total equivalent volume for all promoted products in each promotion (in the All Promotions report) or each product in the category (in the All Products report)
Total Gross COGS	Forecasted gross cost of goods sold for promoted products
Total Gross Margin %	Forecasted net profit (in percentage of revenue) for promoted products <i>(Total Revenue – Total Gross COGS) / Total Revenue</i>
Total Gross Margin \$	Forecasted net profit (in dollars) for promoted products <i>Total Revenue – Total Gross COGS</i>
Total Mfg. Cost	Total cost to the manufacturer for the promotion <i>Predicted Unit Volume * Mfg. Unit Cost</i>
Total Mfg. Gross Margin %	Total manufacturer profit (as a percentage of sales) <i>Total Mfg. Gross Margin \$ / Total Mfg. Revenue</i>
Total Mfg. Gross Margin \$	Total manufacturer profit (in dollars) <i>Total Mfg. Revenue - Total Mfg. Cost</i>
Total Mfg. Gross Profit	Total gross profit to manufacturer <i>Incremental Gross Profit + Baseline Gross Profit</i>
Total Mfg. Gross Revenue	Total gross revenue to manufacturer <i>Incremental Gross Revenue + Baseline Gross Revenue</i>
Total Mfg. Revenue	Forecasted total revenue for manufacturer <i>Predicted Unit Volume * Unit Cost</i>
Total Net COGS	Cost of goods for promoted products minus manufacturer allowances
Total Profit	Total Profit for the promotion period for the promoted products
Total Promotions	Indicates the number of promotions that will be generated from the multi-entry plan
Total Purchase Units	Total units purchased for the product, i.e., sum of the purchase units for each logistical unit

Metric Name	Definition and Formula
Total Retail Gross Margin %	Forecasted retailer net profit as a percentage
Total Retail Gross Margin \$	Forecasted retailer net profit (in dollar amount)
Total Retail Gross Profit	Total gross profit for category between category plan start date and end date
Total Retail Gross Profit %	Total gross profit (as a percentage of revenue) for category between category plan start date and end date
Total Retail Revenue	Forecasted total revenue to retailer for each category or product
Total Revenue	Total forecasted revenue for the promoted products during the promotion period
Total Trade Funds	Total trade funds used for the promotion <i>Performance Allowance + Forward Buy Allowance + Flat Fee</i>
Total Trade Spend	Total trade spend used for the promotion or category plan <i>Performance Allowance + Forward Buy Allowance + Flat Fee</i>
Total Unit Volume	Forecasted total unit volume for each category or product
Total Value	Total Gross Margin + Additional Value for relevant aggregation <i>Net Profit \$ + Additional Value</i>
TPR	Indicates (Yes/No) whether the promotion includes a TPR performance detail
TPR ACV%	For all products in the promotion time period, percentage of stores that executed the discount
TPR Duration	Number of distinct weeks a TPR performance detail occurs in the promotion
TPR Zone	Zone where the TPR will be valid
TPRs #	Number of TPR performance details on the category plan
Trade Funds Per Incremental Case	Amount of trade spend for each incremental case <i>Total Trade Funds / Incremental Case Volume</i>
Trade Funds Per Incremental Equiv.	Amount of trade spend for each incremental equivalent unit <i>Total Trade Funds / Incremental Equiv. Volume</i>
Trade Funds Per Incremental Unit	Amount of trade spend for each incremental unit <i>Total Trade Funds / Incremental Unit Volume</i>

Metric Name	Definition and Formula
Trade Funds ROI	Return on investment for trade spend <i>(Manufacturer Incremental Gross Margin - Additional Value) / Total Trade Funds</i>
Trade ROI	Return on trade funds <i>Mfg. Contribution Margin / Trade Spend</i>
Trade Spend	Total Trade Spend (estimated based on actual sales and can be overridden by the user)
Trade Spend Per Case	<i>Total Trade Spend / Total Case Volume</i>
Trade Spend Per Incremental EQC	Total trade spend per incremental equivalent or "statistical" case sold <i>Total Trade Spend / Incremental EQC</i>
Trade Spend Per EQC	Total trade spend per total equivalent or "statistical" case sold <i>Total Trade Spend / Total EQC Volume</i>
Trade Spend Per Unit	Total trade spend for every unit <i>Total Trade Spend / Total Units</i>
Type	Specifies the specific type of promotion or event
UEF	Case volume for the product calculated using the purchase cases for each logistical unit
UEF Units	Entered (UEF) total unit volume for the promoted product (on the Product grid) or for all promoted products at the location (on the Location grid)
Unit of Measure	Unit of measure for product
Unit Volume	Forecasted unit volume sold for the category between the category plan start date and end date (on the Category Plan Details page), or forecasted unit volume for the logistical unit (on the Logistics tab)
Unit Volume (Category Results -Incremental %)	Percentage increase or decrease in unit volume for the category <i>Incremental Unit Volume / Baseline Unit Volume) * 100%</i>
Unit Volume (Category Results -Incremental)	Incremental units sold for the category <i>Total Unit Volume - Baseline Unit Volume</i>
Unit Volume (Category Results -Total)	Total units sold for the category
Unit Volume (Promoted Products -Incremental %)	Percentage increase or decrease in unit volume for all promoted products <i>(Incremental Unit Volume / Baseline Unit Volume) * 100%</i>

Metric Name	Definition and Formula
Unit Volume (Promoted Products -Incremental)	Incremental promoted units sold <i>Total Unit Volume - Baseline Unit Volume</i>
Unit Volume (Promoted Products -Total)	Total promoted units sold
Unit Volume % Lift	Forecasted percentage increase or decrease in unit volume for product or category <i>((Promoted Volume - Baseline Volume) / Baseline Volume) * 100%</i>
Unit Volume Change	Forecasted percentage increase or decrease in unit volume for the logistical unit <i>((Promoted Volume - Baseline Volume) / Baseline Volume) * 100%</i>
Unit Volume Lift %	Change in Unit Volume represented as a percentage <i>((Promoted Volume - Baseline Volume) / Baseline Volume) * 100%</i>
Unit Volume Lift % - Scale	Change in Unit Volume represented as a normalized bar graph; Green indicates a positive change, while red indicates a negative change <i>(Promoted Volume - Baseline Volume) / Baseline Volume</i>
UOM	Unit of Measure
UPC	Product UPC
Variable Trade Funds	Sum of performance allowances and forward buy allowances <i>Performing Trade Funds + Non Performing Trade Funds</i>
Vendor Suggested	Shows checkmark if the promotion was generated from a offer; vendor-suggested promotions are read-only.
Visibility Status	Shows whether the promotion or category plan is Private or Public.
Volume Decrease %	Change in Unit Volume represented as a percentage
Volume Decrease % - Scale	Change in Unit Volume represented as a normalized bar graph
Volume of Measure	Volume of Measure of product
VOM	Volume of Measure
Week / Week #	Number week of the month or of the year; e.g. Weeks 1 & 2 of April or Weeks 33 & 45 of 2007

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