



# Retail Shelf Planner

What has changed in release 2024?

*March 1<sup>st</sup>, 2024*

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# Explanation of Symbols

➤ The meaning of the symbols on the slides with an explanation of the changes:



– Feature is available in the Express version



– Feature is not available in the Express version



– Feature is available in the Enterprise version



– Feature is not available in the Enterprise version



– Feature is available in the Enterprise Plus version



– A short video is available for this feature on the website

Section 1.

# MERCHANDISING

# Section - Mixed Segments (1)

➤ It is now possible to have a Section with mixed segments

- Height
- Width
- Color
- Base Height

Section Properties

Identification  
ID: 034  
Name: Alcoholic Drinks

Organization  
Department: Food  
Merchandise Group: Drinks

Physical Segments Descriptions & Measures Tracking

Dimensions  
Height: 210cm Width: 300cm Depth: 40cm

Base  
Height: 15cm Width: 300cm Depth: 40cm

Segments  
Segments: 3  
Add/Remove Segment(s)  
Split segments evenly

Visualization  
Transparent  
By Segment

Notch Bars  
Use Notch Bars  
Bar Width: 3cm Notch Height: 2cm Notch Width: 1cm Notch Bar Fill Color: ...  
Notch Start: 17cm Notch Spacing: 5cm Notch Fill Color: ...

OK Cancel

Section Properties

Identification  
ID: 034  
Name: Alcoholic Drinks

Organization  
Department: Food  
Merchandise Group: Drinks

Physical Segments Descriptions & Measures Tracking

Segment Dimensions  
Height: 140cm Width: 80cm Base Height: 15cm

Segment Visualization  
Transparent  
By Segment

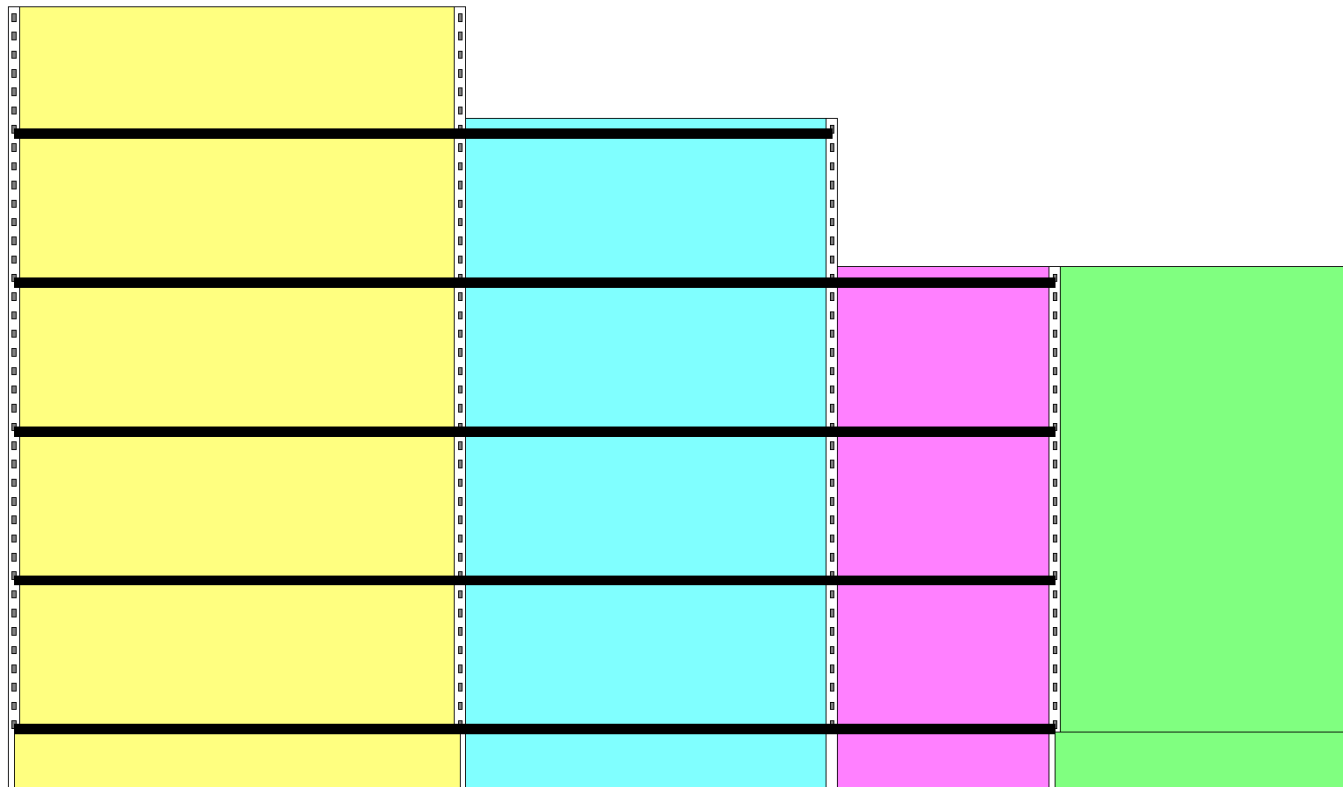
Update

OK Cancel



# Section - Mixed Segments (2)

- When changing segment widths, existing shelves will automatically be resized.
- When increasing the number of segments, the user can choose between adding new segments with the same characteristics of the rightmost segment, or redistributing the total width to create equal width segments.



Segments

Segments:

Add/Remove Segment(s)

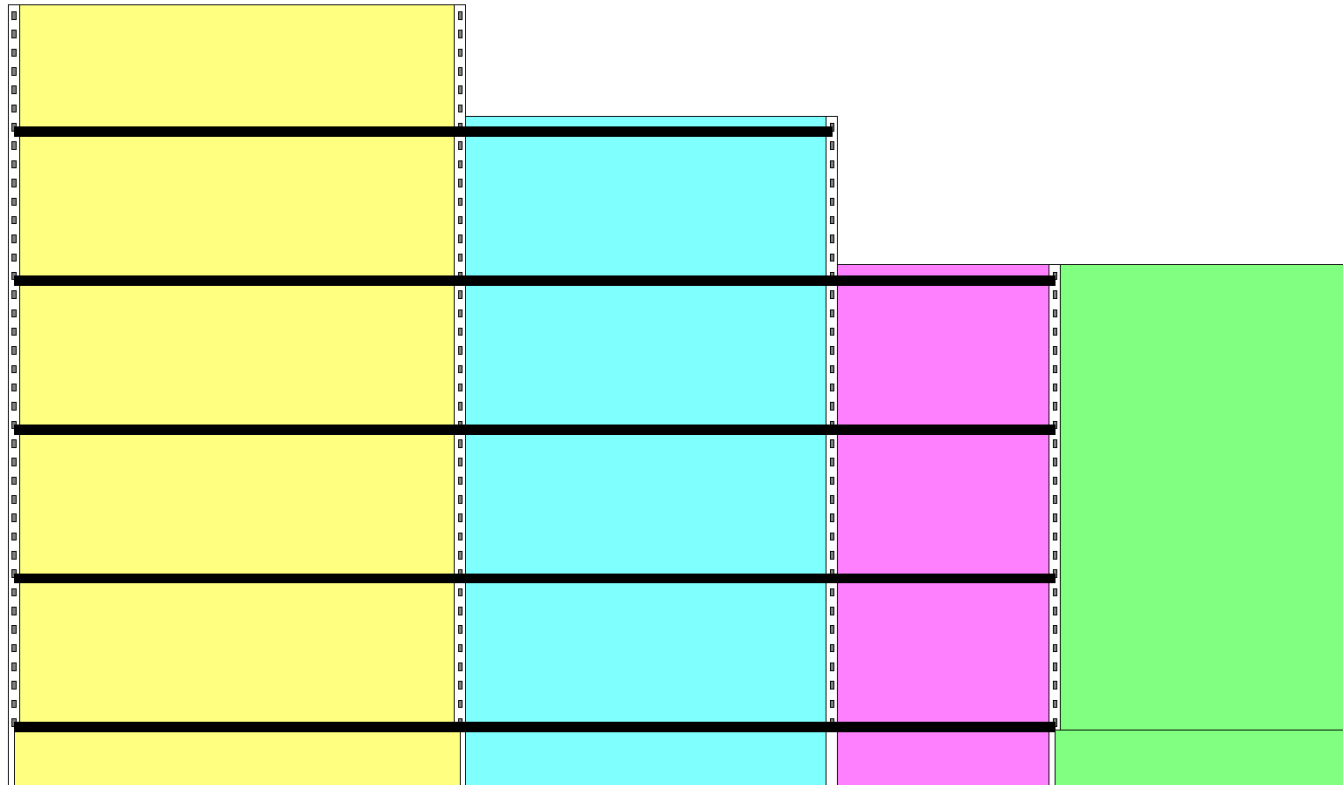
Split segments evenly





# Section - Mixed Segments (3)

- When copying shelves to another segment, there is an option to automatically match the size to the new segment.
- Using a Base Height of 0 will create a segment without a base (segments #2 and #3 in the picture below).



Copy Shelves

From: Segment3 To: Segment4

Automatically renumber new shelves

Match Shelf Width to Segment Width

OK Cancel



# Section - Mixed Segments (4)

- Mixed segments are supported by the Fixture Library.
- As an extension of mixed segments, a new object (Segment) has been introduced, and the existing object Section Component has been extended with additional fields.
  - Both objects are now included in the single planogram and multi planogram Excel reporting.
- A separate document will describe the workings of the dialog in more details, as many of the fields impact each other, and their behavior has been made as logic and predictable as possible.
- Mixed segments and competitive file formats:
  - Mixed segments will be supported (load & save) in the PLN and PSA formats.
  - Mixed segments will not be supported in the XML format.
  - **Retail Shelf Planner** allows for different colors per segment, the PSA format doesn't support that, so all segments will be given the Section color.
  - **Retail Shelf Planner** allows for individual segments to have or not have a base, the PLN and PSA formats only support 1 single base, which will be the consolidated width of the individual segment bases in **Retail Shelf Planner**.

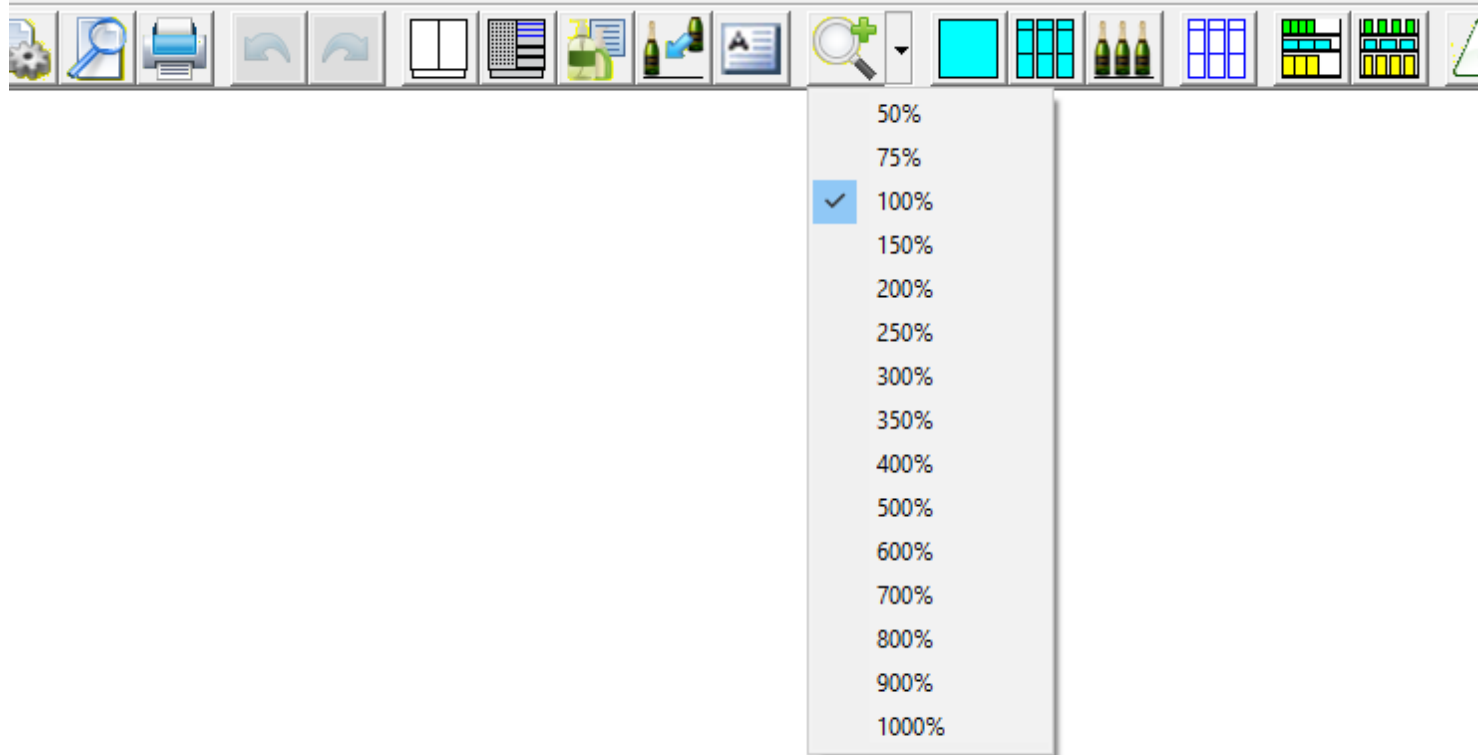


Section 2.

# VISUALIZATION

# Zoom

- To make working with large planograms easier, the zoom options have been extended to 1000%.



# Position Labels

- The new Desc 6-20, Data 6-20, Brand & Manufacturer fields are available to be displayed in the Position label.
- The Product and Position DaysOfSupply values are now immediately updated in the label when the position changes.
- The Position dialog is now correctly positioned when it was last used outside the scope of one of the currently available displays.
- In some cases (product with a height that was not big enough for the smallest font size), **Retail Shelf Planner** would draw the label outside the position. This is now fixed.

Position Label

Label Definition

Product Fields:

- Data Ren 3
- Data4
- Data5
- Units Per Case
- Units Per Tray
- Price
- Unit Profit
- Gross Margin %
- Sales
- Profit
- Movement
- Total Units
- Total Facings

Position Fields:

- ShelfID
- Facings
- UnitsHigh
- UnitsDeep
- TotalUnits
- LocationNumber
- X

Special Fields:

- [Line Break]
- /
- 

Free Text:

Selected Fields:

- ID
- [Line Break]
- Name
- [Line Break]
- Total Facings
- F
- /
- Total Units
- ST

Label Description

ID / Name / Facings

Note: this is the description under which the label will be stored and can be selected.

Label Formatting

Font Settings

Font to use for labels:  
Calibri (Size: 8)

Textcolor:  
Dark Blue

Label Background

Transparent

[Color Picker]

Text Alignment

Center

Text Control

Wrap Text

Shrink to Fit

Display

Show on Live Image

OK Cancel



# Fixture Labels

- The fields Part Number, Supplier, Cost, Peg Part Number, Peg Supplier and Peg Cost can now be used in Fixture labels.
- The Fixture Label definition dialog now uses option buttons instead of checkboxes for label background.

The screenshot shows the 'Fixture Label' dialog box with the following sections:

- Label Definition:**
  - Fixel Fields:** A list containing 'Y', 'Z', 'Notch', 'Remaining', 'PartNumber', 'Supplier', 'Cost', 'PegPartNumber', 'PegSupplier', and 'PegCost'. 'Notch' is selected.
  - Selected Fields:** A list containing 'Notch' and 'Notch'.
  - Special Fields:** A list containing '[Line Break]' and '/'.
  - Free Text:** An empty text input field.
- Label Description:** A text input field containing 'Notch'. Below it is a note: 'Note: this is the description under which the label will be stored and can be selected.'
- Label Formatting:**
  - Font Settings:**
    - Font to use for labels:** A dropdown menu showing 'Arial (Size: 8)'.
    - Textcolor:** A color selection button showing a black swatch.
  - Label Background:** Two radio buttons: 'Transparent' (unselected) and a selected radio button with a color selection button showing a white swatch.

Buttons for 'OK' and 'Cancel' are located at the bottom right of the dialog.



Section 3.

# FIELDS / FILES / IMPORT

# Additional Section Fields

- The Section object now offers 20 Desc and 20 Data fields to hold additional characteristics to classify the planogram.
- These fields can be given custom labels to match the client's specific business requirements.
- The Data fields now accept negative values as well.
- These fields will be exchanged in the competitive file format PSA.

The 'Options' dialog box has several tabs: Position Labels, Shelf Labels, Competitive Files, General, International, Live Images, File Locations, Database, and Product Library. The 'Section Fields' tab is active, showing a table to assign new labels to section fields.

Assign New Labels To SectionFields	
Desc1:	Rename 1
Desc2:	
Desc3:	
Desc4:	Rename 4
Desc5:	
Desc6:	
Desc7:	
Desc8:	
Data1:	
Data2:	New Data 2
Data3:	
Data4:	
Data5:	New Data 5
Data6:	
Data7:	
Data8:	

The 'Section Properties' dialog box has tabs for Physical, Segments, Descriptions & Measures, and Tracking. The 'Descriptions & Measures' tab is active, showing two tables for configuring additional descriptions and measures.

Additional Descriptions	
Rename 1:	
Desc2:	
Desc3:	
Rename 4:	
Desc5:	
Desc6:	
Desc7:	
Desc8:	
Desc9:	
Desc10:	
Desc11:	
Desc12:	
Desc13:	
Desc14:	
Desc15:	
Desc16:	
Desc17:	
Desc18:	

Additional Measures	
Data1:	0
New Data 2:	0
Data3:	0
Data4:	0
New Data 5:	0
Data6:	0
Data7:	0
Data8:	0
Data9:	0
Data10:	0
Data11:	0
Data12:	0
Data13:	0
Data14:	0
Data15:	0
Data16:	0
Data17:	0
Data18:	0





# Additional Product Fields (1)

- The Product object a number of extra fields:
  - Desc 6-20 for text values.
  - Data 6-20 for numeric values.
  - Manufacturer.
  - Brand.
- Product Data 1-20 fields can now accept negative numbers as well.
- The fields Units/Case, Units/Tray and Manual Inventory are now limited to accept input from the keys 0-9 only.

The screenshot shows a 'Product Properties' dialog box with the following sections:

- Identification:** ID: 101.728.100, UPC: 87000008450, Name: 100 PIPERS 75CL
- Organization:** Category: ALCOHOLIC DRINKS, Subcategory: WHISKY, Supplier: OTHERS, Manufacturer: (empty), Brand: (empty)
- Additional Descriptions:**

Rename 1:	COMMODITY
Rename 2:	100 PIPERS
Rename 2:	75 CL
Desc4:	
Desc5:	
Desc6:	
Desc7:	
Desc8:	
- Additional Measures:**

Data Ren 1:	0
Data2:	0
Data Ren 3:	0
Data4:	0
Data5:	0
Data6:	0
Data7:	0
Data8:	0

Buttons: OK, Cancel



# Additional Product Fields (2)

- The Desc 1-20 and Data 1-20 fields can be given custom labels to match the client's specific business requirements.
- Competitive file formats:
  - All new fields are loaded from and saved to the PSA format.
  - Desc 1-10, Data 1-10, Brand & Manufacturer are exchanged with the XML-format.
  - Desc 1-10, Data 1-10, Brand & Manufacturer are exchanged with the PLN-format.
  - Supplier, Desc 11-20 & Data 11-20 are exchanged as custom fields with the PLN-format.

Options

Position Labels | Shelf Labels | Competitive Files  
General | International | Live Images  
File Locations | Database  
Section Fields | **Product Fields** | Product Library

Assign New Labels To ProductFields

Desc1:	Rename 1
Desc2:	Rename 2
Desc3:	Rename 2
Desc4:	
Desc5:	
Desc6:	
Desc7:	
Desc8:	

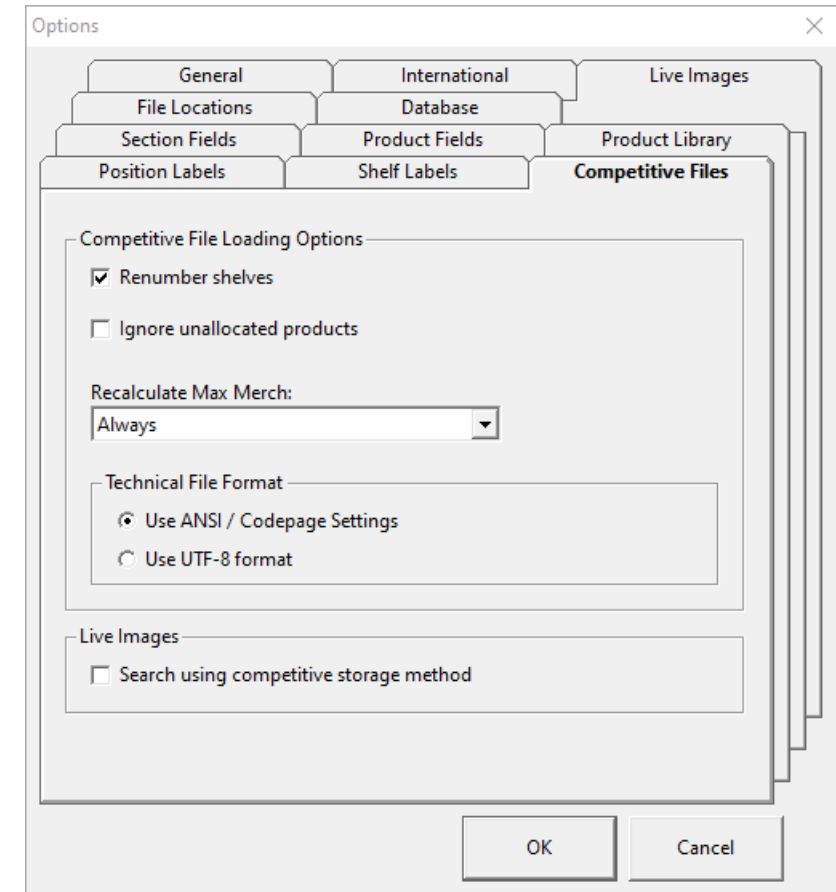
Data1:	Data Ren 1
Data2:	
Data3:	Data Ren 3
Data4:	
Data5:	
Data6:	
Data7:	
Data8:	

OK Cancel



# Competitive Files

- Product fields Supplier, Desc11-20 and Data1-20 are saved as custom fields in PLN-files. The new fields Manufacturer and Brand are now mapped to the corresponding Spaceman fields.
- Improved performance of processing PLN-files with reductions of up to 50%.
- When saving a planogram in PLN-format, the InfoBox settings WrapText and Shrink to Fit are now included in the export.
- Fixed various problems in the PLN- and PSA-loaders to deal with incorrect files created by third party software applications.
- Since some software applications don't follow technical standards of PLN- and PSA-file formats an option was added to Tools-Options allowing the user to select between using the ANSI format based on the Windows' Codepage, or the UTF-8 Unicode format.  
*(In case strange characters are displayed after opening the planogram file, close it, select the other option, and re-open it.)*



# Import from Database

- The “Import from database” dialog now uses the user defined names for the Desc and Data fields.
- Import Products from database now allows to filter on up to 3 criteria.
- When using the “All criteria have to be met” restriction, the second and third filter only show the applicable values for the selected field.

Import from database

How to update

- Update existing & add new products
- Only update existing products
- Only add new products

Selected Fields Only Options...

Match products on

- ID
- UPC

Filter

Combining Criteria:

- All criteria have to be met
- One or more criteria have to be met

Filter Criteria

Subcategory	=	2-Stroke Oil
Subcategory	=	
Thema	=	
Desc2	=	
Desc3	=	
Supplier Name		
Supplier Code		
Data1		
Data2		
Data3		

Number of filter criteria: 5

OK Cancel



Section 4.

# USABILITY

# Significant Performance Improvements

- Significant performance improvements when working with a planogram\*
  - Saving undo information - up to 87% reduction.
  - Calculating product spatial info - up to 75% reduction.
  - Calculating product financial info - up to 96% reduction.
  - Redrawing planogram - up to 55% reduction.
- Improved the performance of Excel reporting. Both single planogram and multi-planogram. (Up to 95% reduction of the time needed to create the report.)

\* *Tested with a large planogram: 39 segments, 1000+ products. Overall time from selecting planogram and press OK to load to display on screen reduced from 11.6 seconds to 4.1 seconds. Drag & Drop when displaying position labels time reduced from 6.3 seconds to 3.0 seconds. Drag & Drop time is reduced by another 50% to 1.5 seconds when no position labels are used in large planograms*

*Actual results depend on the specifications of the hardware.*

*The size of product images and the selected font size for labels play an important role. The larger the original size is versus the actual size on screen/print, the more calculations are needed to resize the image and/or text to the required size.*



# Product Find (in Planogram)

- The Find Product dialog in the planogram now defaults to the dropdown for the selected search field, so that they user can immediately enter a value.
- When pasting or typing a value in the dropdown for Product ID, it is no longer needed to first click the dropdown to select the value in the list and then click Find.
- Product Find now allows to keep the selected Position(s) when closing the dialog, so that the selected Positions can directly be changed or deleted.

Find Product

Search On

Product ID  UPC  Name

3259866472460

Options

Show arrow & dotted line

Show horizontal arrow

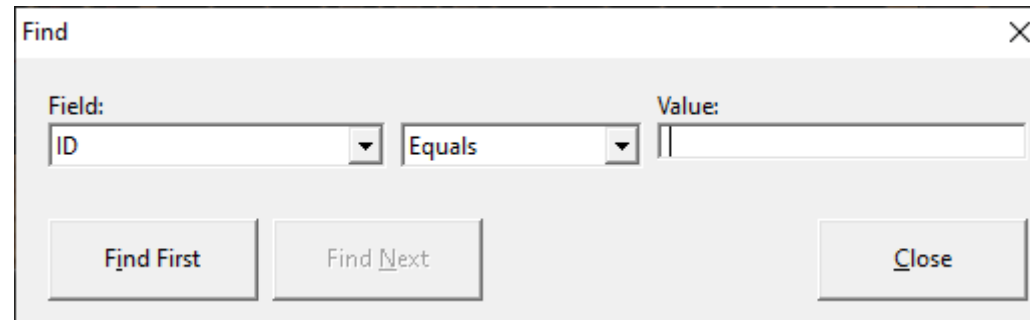
Keep selection upon close

Find Close



# Product Find (in Product Library)

- The Find Product dialog in the Product Library now:
  - Remembers the last used field and operand.
  - Defaults to the Value field so that the user can immediately enter a value.



The screenshot shows a 'Find' dialog box with the following elements:

- Field:** A dropdown menu with 'ID' selected.
- Operands:** A dropdown menu with 'Equals' selected.
- Value:** A text input field.
- Buttons:** 'Find First', 'Find Next', and 'Close'.





# Change Multiple Products

- Change Multiple Products now highlights the changed fields green as a visual help for the user.

The screenshot shows the 'Change Selected Products' dialog box with a 'Retail Shelf Planner' warning dialog overlaid. The 'Change Selected Products' dialog has a table with the following data:

Identification	
UPC	<Multiple Values>
Tray UPC	
Name	<Multiple Values>
Characteristics	
Supplier	<Multiple Values>
Manufacturer	
Category	ALCOHOLIC DRINKS
Subcategory	<Multiple Values>
Brand	
Rename 1	<Multiple Values>
Rename 2	<Multiple Values>
Desc4	
Desc5	
Desc6	EAST
Desc7	
Desc8	
Desc9	A
Desc10	
Desc11	
Desc12	
Desc13	
Desc14	
Desc15	
Desc16	
Desc17	
Desc18	
Desc19	
Desc20	
Data Ren 1	12
Data2	0
Data Ren 3	-4.7
Data4	0
Data5	0
Data6	0
Data7	0
Data8	0
Data9	0

The 'Retail Shelf Planner' dialog box contains the following text:

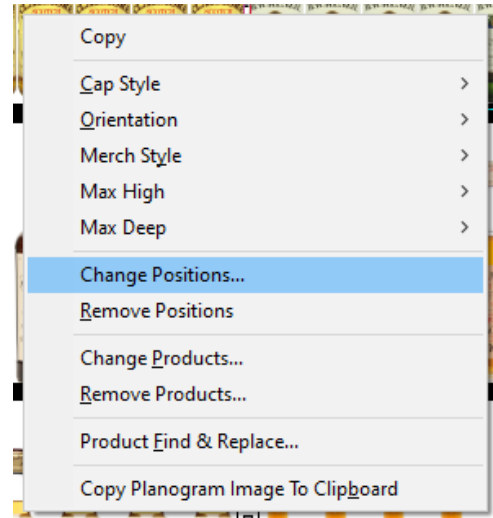
⚠ All fields that are green colored will be updated. Continue?

Buttons: Yes, No



# Change Multiple Positions

- Change any of the characteristics of 2 or more selected Positions.
- Changed fields are highlighted in bold and green.
- Max High and Max Deep units can be based on required stock, so this is also an optimization feature. *(Enterprise and Enterprise Plus editions)*
- Accessible via popup menu.

A screenshot of the 'Change Multiple Positions' dialog box. It contains several sections: 'Facings' with a radio button for '5' and a checked radio button for 'Multiple Values'; 'Capping Style' with a dropdown menu set to 'Med Cap' and a checked radio button for 'Multiple Values'; 'Orientation' with a dropdown menu set to 'Front' and a checked radio button for 'Multiple Values'; 'Merch Style' with a dropdown menu set to 'Units' and a checked radio button for 'Multiple Values'; 'Maximum Units High' with radio buttons for 'No limit', 'Limit to 1 Units', 'Based on 1.5 Cases', 'Based on required stock', and 'Multiple Values'; and 'Maximum Units Deep' with radio buttons for 'No limit', 'Limit to 5 Units', 'Based on 1.5 Cases', 'Based on required stock', and 'Multiple Values'. At the bottom, there is a note: 'Note: fields that are marked bold and green will be updated.' and 'OK' and 'Cancel' buttons.

# Shelf Dialog

- Shelf field Notch is now limited to accept input from the keys 0-9 only.
- Clicking column header Y in shelf dialog now immediately reflects + or - for sort order.
- When automatically calculating the Max Merch, the value is now rounded to 1 decimal.

The screenshot shows the 'Shelf Properties' dialog box. At the top, there is a 'Segment' dropdown set to 'Segment1' and a 'Special Actions' section with icons for undo, redo, and other actions. Below this is a table titled 'Shelves in Selected Segment' with the following data:

Description	Height	Width	Depth	Max Merch	Y -	Fill Color
1/1	2.5cm	100cm	40cm	35cm	174.5cm	
1/2	2.5cm	100cm	40cm	35cm	134.5cm	
1/3	2.5cm	100cm	40cm	35cm	94.5cm	
1/4	2.5cm	100cm	40cm	35cm	54.5cm	
1/5	2.5cm	100cm	40cm	35cm	14.5cm	

Below the table is the 'Selected Shelf' section. It includes a 'Type' dropdown set to 'Open Shelf' and a 'Description' field containing '1/1'. The section is divided into four tabs: 'Physical', 'Picture', 'Additional Info', and 'Squeeze'. The 'Physical' tab is active and contains the following fields:

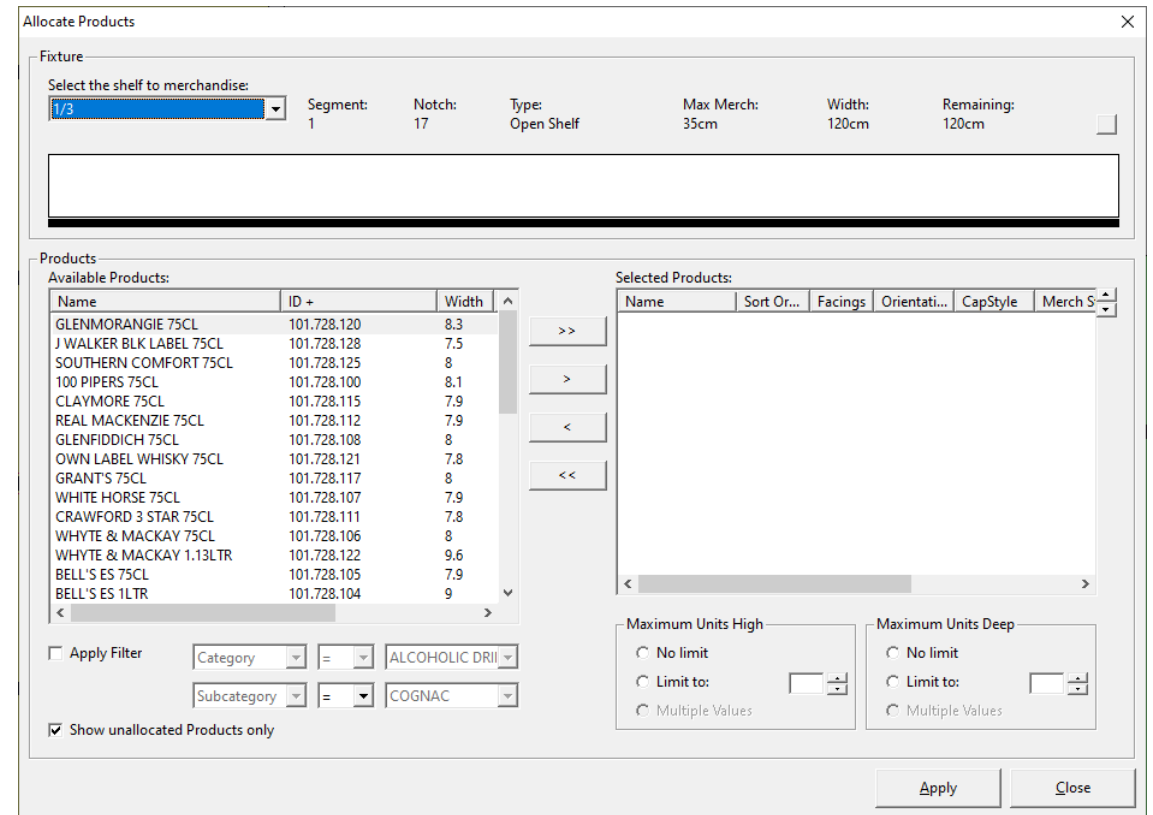
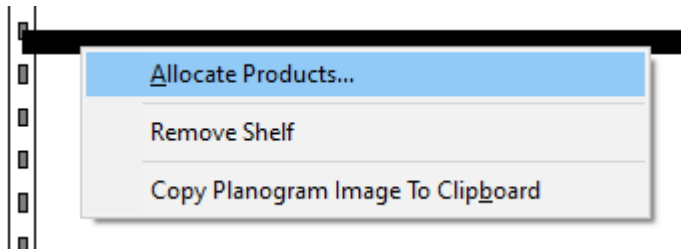
- Physical:** Height (2.5cm), Width (100cm), Depth (40cm)
- Merchandising:** Max Merch (35cm)
- Location:** Y (174.5cm), Notch (33)
- Overhang:** Left (0cm), Right (0cm)
- Visualization:** Fill Color (black), Grill Style (None), Grill Height (0cm)
- Dividers:** Height (0cm), Width (0cm), Between Products (dropdown), and checkboxes for 'Divider at the start' and 'Divider at the end'.

At the bottom of the dialog are 'Add', 'Update', and 'Remove' buttons, and at the very bottom right are 'Apply' and 'Close' buttons.



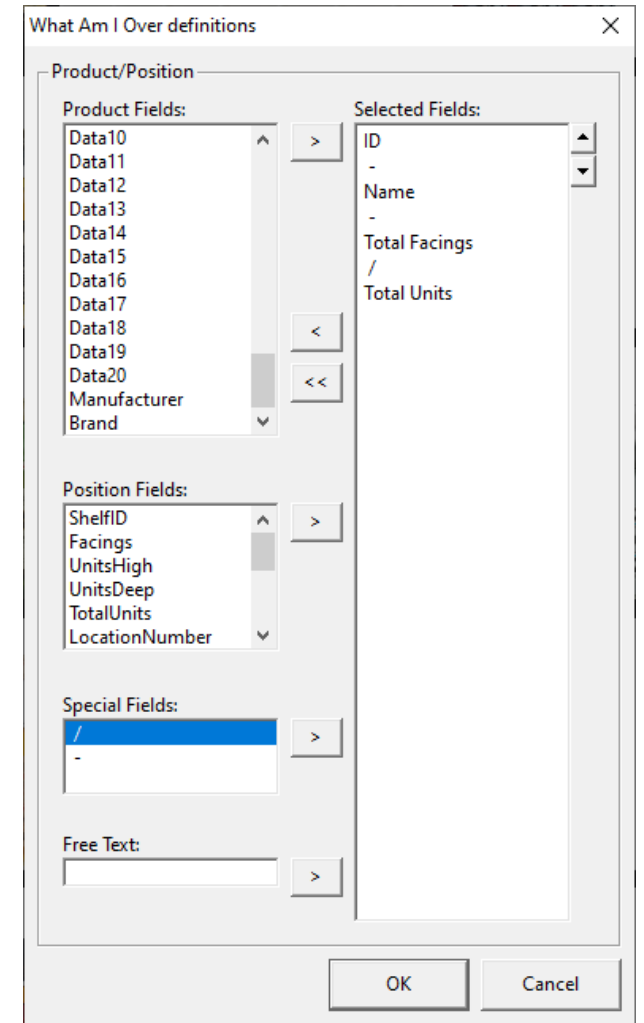
# Position Dialog

- It is now possible again to reorder positions in the Allocate Products dialog.
- It is now possible to open the Position dialog from a right mouse click on a shelf with the shelf directly selected.
- The new Product fields Desc 6-20, Data 6-20, Brand & Manufacturer are available for the filters.



# Status Bar

- The new Desc 6-20, Data 6-20, Brand & Manufacturer fields are available to be displayed in the Status Bar.
- The Product and Position DaysOfSupply values are now immediately updated in the status bar when the position changes.



# Product Library using RMC database (1)

## ➤ The Product Library filter

- Now allows to filter on up to 3 criteria
- When using the “AND” restriction, the second and third filter only show the applicable values for the selected field.
- Is now accessible via a toolbar button.
- Offers several additional operands to optimize the selection criteria.



Product Library Filter

Filter

Include All Products

Apply Filter

Combining Criteria:

All criteria have to be met

One or more criteria have to be met

Filter Criteria

Category	=	BBQ & Accessories
Subcategory	=	Covers
	=	

Number of products matching the filter criteria: 7

OK Cancel

Filter Criteria

Category	=	BBQ & Accessories
Subcategory	=	Covers

Dropdown menu options: =, <>, >, <, >=, <=



# Product Library using RMC database (2)

## ➤ The Product Library filter

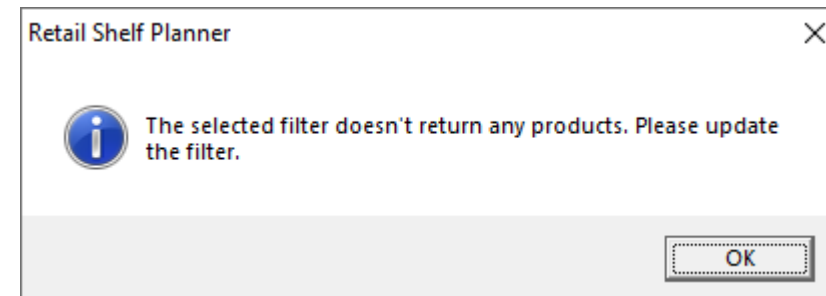
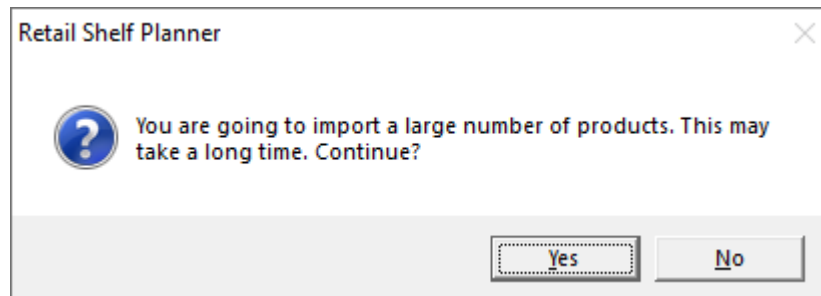
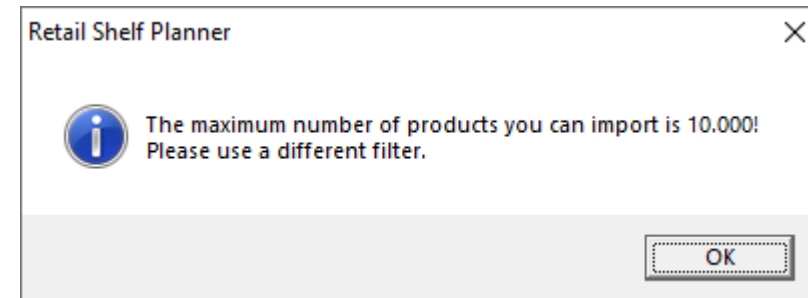
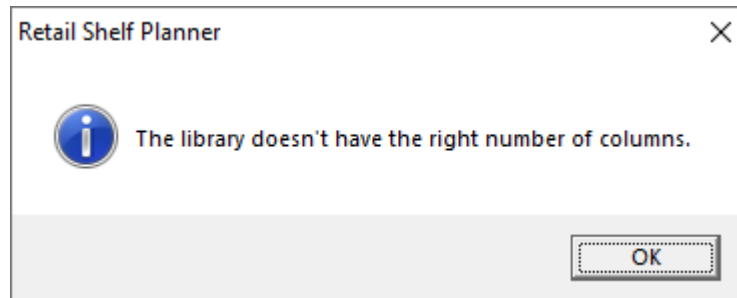
- Refreshes the column headers when leaving the Tools-Options dialog and the selected language has changed.
- Shows translated fieldnames when using Retail Merchandising Center database.
- Shows product field renames for Desc & Data fields.

ID	UPC	이름	공급자	카테고리	서브카테고리	Rename 1	Rename 2	Rename 2	설명4	설명5	Data Ren 1	데이터2
160440	871410020...	CONIMEX KETJAP MANIS NATRIUMAR		48 Indisch	48IA	1		48A			0	0
187690	871450000...	STUART GEMBERSIROOP 300 ML		48 Indisch	48IA	1		48A			0	0
20035075	20035075	Chatau Larrivaux		Wine	Red	France			Drinks	Alcoholic Drinks	0	0
3111957650907	311195765...	SABAROT ESCARGOTS DE BOURGOGNE 212GR		Canned Fish	Other	SABAROT		212GR	Food	Dry Groceries	0	0
3120581096098	312058109...	Terrelou		Wine	Rose	France			Drinks	Alcoholic Drinks	0	0
3165950113013	316595011...	SAUPIQUET THON AU NATUREL 185GR		Canned Fish	Tuna	SAUPIQUET	NATUREL	185GR	Food	Dry Groceries	0	0
3165950114010	316595011...	SAUPIQUET THON NATUREL 400GR		Canned Fish	Tuna	SAUPIQUET	NATUREL	400GR	Food	Dry Groceries	0	0



# Product Library using RMC database (3)

- The Product Library filter offers better information for the user in several situations.
  - In case the library definition in the database doesn't have the correct number of columns.
  - Applies a limit to 10.000 products to avoid delays and/or memory problems.
  - Prompts if user want to continue if number of selected products is larger than 5000.
  - Clear warning if the selected filter doesn't return any products.





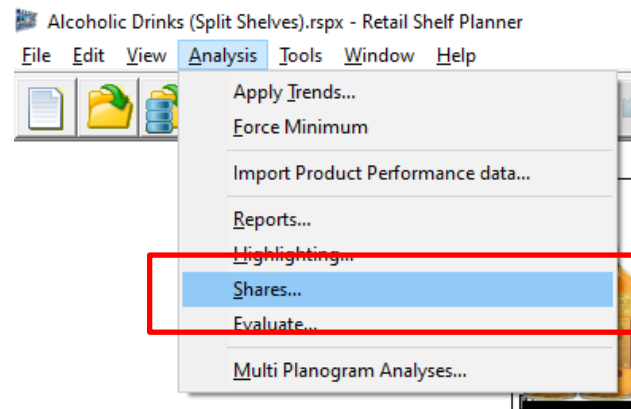
Section 5.

# ANALYSIS & OPTIMIZATION

# Quick Insight in Shares

- Quick insight into shares:
  - Sales, Profit, Movement (Historical or Projected).
  - Grouped on Manufacturer, Supplier, Category, SubCategory, Brand or Desc 1-20.
- Copy to Clipboard for easy sharing / use in other apps.
- Access via Analysis-menu and toolbar.

Subcategory	Sales	Profit	Movement	Lineal Space
COGNAC	16.5%	16.3%	11.8%	10.5%
GIN	8.6%	8.8%	11.6%	10.4%
LIKEUREN	9.4%	10.0%	11.2%	10.0%
RUM	6.8%	7.0%	9.4%	11.2%
WHISKY	42.8%	43.3%	37.4%	41.5%
WODKA	15.9%	14.6%	18.5%	16.5%



# Highlight Characteristics

- Highlight Characteristics includes several enhancements:
  - All new product fields (Desc 6-20, Data 6-20, Manufacturer, Brand) as well as several performance fields are now available to use in the criteria.
  - Several additional operands provide more flexibility to select products.
  - A new option not only highlights, but also selects the products on the shelves, so that direct action can be taken on them.
  - When the option “All criteria have to be met” is selected, the values for the 2<sup>nd</sup> and 3<sup>rd</sup> criteria display only applicable values.

Highlighting

Highlight Options

- None
- Top/Bottom Analysis
- Under- & Overstocked Analysis
- Quadrant Analysis
- Characteristic Analysis
- Hot/Cold-zone Analysis
- Group Analysis

Display Options

- Display Legend
- Show on top of Live Images

OK

Cancel

Characteristic Analysis Settings

Criteria

- Category
- Data20
- Price
- Cost
- Unit Profit
- Gross Margin %
- Sales
- Profit
- Movement
- ActualDaysOfSupply

Combining Criteria:

- All criteria have to be met
- One or more criteria have to be met

Show Results

Does not meet criteria color:

Meets criteria color:

Select the applicable positions

Highlighting

Highlight Options

- None
- Top/Bottom Analysis
- Under- & Overstocked Analysis
- Quadrant Analysis
- Characteristic Analysis
- Hot/Cold-zone Analysis
- Group Analysis

Display Options

- Display Legend
- Show on top of Live Images

OK

Cancel

Characteristic Analysis Settings

Criteria

- Sales
- =
- <
- <=
- >
- >=
- <=

Combining Criteria:

- All criteria have to be met
- One or more criteria have to be met

Show Results

Does not meet criteria color:

Meets criteria color:

Select the applicable positions



# PowerPoint Highlight Group By (1)

➤ Several new keywords were added to control the Group By highlight in PowerPoint output templates:

- **ShowOverLive\_ON / ShowOverLive\_OFF**

- Defines if the highlight colors should be imposed as a semi-transparent box on top of the Live Image or not
- Is only relevant in combination with the keyword Live

- **Field1:<xxx>**

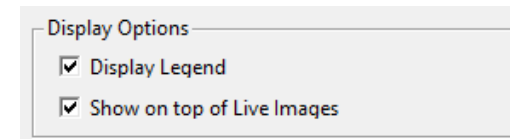
- Where xxx is one of the English fieldnames to group on
- Manufacturer, Supplier, Category, SubCategory, Brand, Desc1-20, Data1-20

- **Field2:<yyy>**

- Where yyy is one of the English fieldnames to group on
- Manufacturer, Supplier, Category, SubCategory, Brand, Desc1-20, Data1-20

➤ The settings last used for a manual highlight will be used when:

- The new settings are not included in the template
- An incorrect spelling is used for the fieldname xxx in the keyword Field1:<xxx>

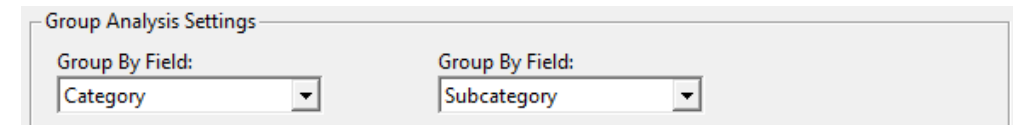


Display Options

- Display Legend
- Show on top of Live Images

➤ When an incorrect spelling is used for the fieldname yyy in the tag Field2:<yyy>

- The highlight will be based on the selected field xxx in keyword Field1:<xxx>



Group Analysis Settings

Group By Field: Category

Group By Field: Subcategory



# PowerPoint Highlight Group By (2)

➤ Good to know about the overall instructions tag:

- The order of the keywords is not relevant
- Keywords and fieldnames are not case sensitive
- As long as the keywords are within one TextBox, they can be split across multiple lines, have indentation, etc.

➤ Examples of correct use of the keywords:

```
PLANOGRAM LIVE SPREAD  
GROUPBY  
  FIELD1:<CATEGORY>  
  FIELD2:<SUBCATEGORY>  
  LEGEND  
  SHOWOVLIVE_ON
```

```
PLANOGRAM LIVE SPREAD  
GROUPBY  
  Field1:<Category>  
  Legend  
  ShowOverLive_Off
```

```
Planogram UNITS SPREAD GroupBy FIELD1:<Category> FIELD2:<SubCategory>
```

```
Planogram Blocks Spread GroupBy Legend
```



# PowerPoint Template Tables

- The new Desc 6-20, Data 6-20, Brand & Manufacturer fields are available to be displayed in the PowerPoint table.

Product by Shelf Table Definition

Report Name: ProductsByShelf

Shelf Row Fields:

Shelf Fields: ID, Description, Type, Height, Width, Depth, MaxMerch, Notch, X, Y, Z

Selected Fields: Description

Product/Position Row Fields:

Position Fields: UnitsDeep, TotalUnits, LocationNumber, X, Y, PegColumn, PegRow, ActualDaysOfSupply, TotalFacings

Product Fields: Data9, Data10, Data11, Data12, Data13, Data14, Data15, Data16, Data17, Data18, Data19, Data20, Manufacturer, Brand

Field	Header	Width
LocationNumber	Loc.Nr	100
UPC	EAN	175
Name	Naam	450
Facings	Fac	100
TotalUnits	Stock	100

Free Text:

Sorting: Horizontal: Right to Left, Vertical: Bottom to Top

OK Cancel

PowerPoint Products/Positions Table Definition

Report Name: Ranking

Report Definition:

Position Fields: Facings, UnitsHigh, UnitsDeep, TotalUnits, LocationNumber, X, Y, PegColumn, PegRow

Product Fields: ID, UPC, Name, Supplier, Category, Subcategory, Thema, Desc2, Desc3, Supplier Name, Supplier Code, Data1, Data2, Data3, Data4

Selected Fields:

Field	Header	Width
Supplier	Supplier	30
Supplier Code	Desc5	10
UPC	UPC	12
Name	Name	20
Thema	Desc1	10
Total Units	Total Units	7
Units Per Case	Units Per Case	7
Required Units	Required Units	10

Sorting:

Field: Supplier, Sort Order: Ascending

Field: , Sort Order: Ascending

Field: , Sort Order: Ascending

OK Cancel



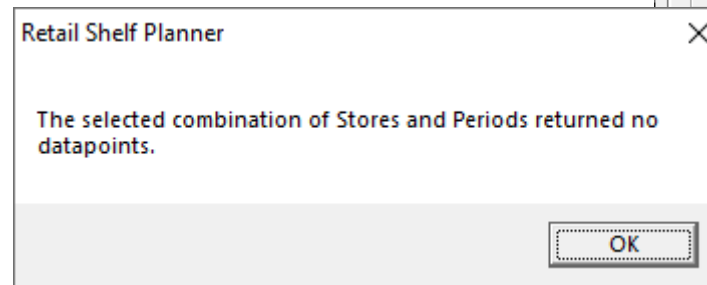
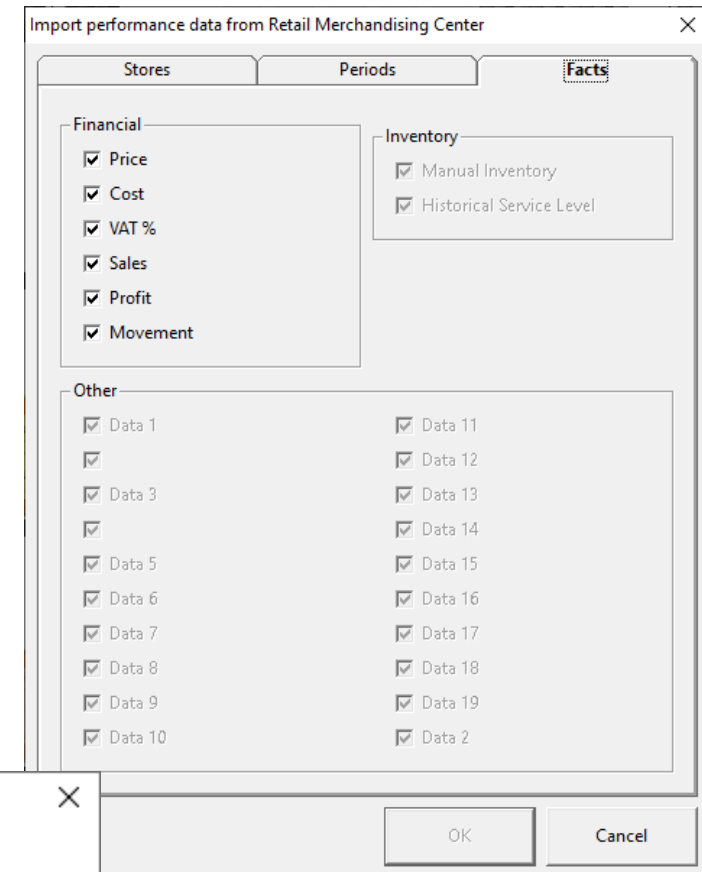
# PowerPoint Output

- We added various new keywords to display Section-information in PowerPoint output templates:
  - Status\_Value
  - Created\_By, Creation\_Date\_Short, Creation\_Date\_Long
  - Modified\_By, Modified\_Date\_Short, Modified\_Date\_Long
  - Go\_Live\_Date\_Short, Go\_Live\_Date\_Long
  - Go\_Historic\_Date\_Short, Go\_Historic\_Date\_Long
  - Desc6, Desc7, Desc8, Desc9, Desc10, Desc11, Desc12, Desc13, Desc14, Desc15, Desc16, Desc1, Desc18, Desc19, Desc20
  - Data6, Data7, Data8, Data9, Data10, Data11, Data12, Data13, Data14, Data15, Data16, Data1, Data18, Data19, Data20
- Splitting PowerPoint tables by segment now works correctly on Windows' PC's using a comma as a decimal separator when the width of the segments the planogram is split in, is not a round number.



# Import Performance Data

- The Period list now responds correctly to the field selection.
- **Retail Shelf Planner** now displays a better error message when the selected Stores/Periods don't result in datapoints for the Performance Data Import.
- The Performance Data Import from **Retail Merchandising Center** has been extended to include all 20 Data fields.
- The Performance Data Import from **Retail Merchandising Center** now uses the user defined field names.
- If a Store\_IDs contains non-numeric characters, double clicking now correctly selects it.





# Reset Performance Data

- The Reset Performance Data feature now includes all Product Data fields.

Reset Performance Data

Financial

- Price
- Cost
- VAT %
- Sales & Trend Sales
- Profit & Trend Profit
- Movement & Trend Movement

Inventory

- Manual Inventory
- Historical Service Level

Evaluations

- Delete Saved Evaluations

Other

- Data Ren 1
- Data2:
- Data Ren 3
- Data4:
- Data5:
- Data6:
- Data7:
- Data8:
- Data9:
- Data10:
- Data11:
- Data12:
- Data15:
- Data14:
- Data13:
- Data16:
- Data17:
- Data18:
- Data19:
- Data20:

OK Cancel



Section 6.

# MISCELLANEOUS

# Miscellaneous (1)

- When during an Excel Import, one or more dimensions of a product is given the value 0, **Retail Shelf Planner** removes the position, displays an error message about an error on the first empty row after the data, and then crashes doing recalculations. This has been fixed.
- The option in the Tools-Options dialog to set the Max Number Of Products in the Library has been removed.
- Opening a planogram from the database where products with missing dimensions are merchandised no longer crashes the software.
- When creating a new shelf using <Ctrl> drag & drop a shelf that is not correctly aligned with the center of the notch hole, the new shelf now is correctly aligned with the center of the notch hole.
- We've built in extra security around the translation of popup menu's for improved stability.
- The CopyProduct routine during import now includes all fields. (Applicable when Import match on UPC causing ID to change.)



# Miscellaneous (2)

- If **Retail Shelf Planner** is not installed in the Windows profile of the user, all default settings will be lost. **Retail Shelf Planner** will then attempt to recreate them at startup in the user profile. This now also works correctly for the Product/Position info in the Status Bar.
- Saving **Retail Shelf Planner** planogram files sent as an attachment to an email in an Apple IOS environment changes the file format. **Retail Shelf Planner** has been enhanced to deal with this “corrupted” format.
- The Product List and InfoBox List are no longer shown as extra icon in taskbar.
- File-Close did not properly enable/disable all applicable toolbar buttons, allowing the user to click on e.g. Shelves which would lead to a crash. This has been fixed.
- Scrolling the mouse wheel is now ignored if there is no Section defined, as this could lead to the user selecting a different zoom-factor without realizing it, which would lead to unexpected results (e.g. nothing displayed after creating the Section as it’s too much zoomed in).



# Miscellaneous (4)

- The Evaluate menu-option and toolbar button are now disabled when there are no products.
- List with Live Image Paths in Tools-Options dialog will automatically have a horizontal scrollbar if there are selected paths that are wider than the list.
- Merchandising calculations now check for “ghost positions” (= position for non-existing product) and remove them so processing is not interrupted with a crash of the software.
- The Shelf field SqueezeStyle is now correctly exported to Excel reports.
- The file location info for custom Multi Planogram templates is now no longer visible in the Express version.
- The software no longer crashes if the height of the main window is made smaller than the height of the menu, toolbar and status bar combined.



# More information in Error Handling (1)

➤ The error message when something goes wrong when redrawing the planogram has been extended with a code that gives more info on the area where the problem occurred:

- PDS 001 General initialization
- PDS 002 Printer drawing initialization
- PDS 003 Screen drawing initialization
- PDS 004 Highlighting Legend (Creation)
- PDS 005 InfoBoxes behind the Section
- PDS 006 Section Components
- PDS 007 Fixtures
- PDS 008 Dividers
- PDS 009 Position (Block)
- PDS 010 Position Label
- PDS 011 Hanger
- PDS 012 Position (Unit / Live Image)
- PDS 013 Position Label (Unit / Live Image)
- PDS 014 Peg in hanging products
- PDS 015 Shelf Grilles
- PDS 016 Max Merch areas
- PDS 017 InfoBoxes in front of the Section
- PDS 018 Highlighting Legend (Drawing)



# More information in Error Handling (2)

➤ The error message when saving a planogram in **Retail Merchandising Center** database fails has been expanded with a code that gives more info on the area where the problem occurred:

- DBS 001 Delete Old Planogram
- DBS 002 Section Object
- DBS 003 Segment Object
- DBS 004 SectionComponent Object
- DBS 005 Shelf Object
- DBS 006 Product Object
- DBS 007 Position Object
- DBS 008 Page Setup Object
- DBS 009 Inventory Model Object
- DBS 010 InfoBox Object
- DBS 011 RSP\_WrapUpPlanogramSave
- DBS 012 Updating Tracking Info





# Retail Shelf Planner

What has changed in release 2024?

*March 1<sup>st</sup>, 2024*