

Retail Shelf Planner

Release 2021

December 15th 2020





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Explanation Symbols

- The slides show several symbols in addition to the explanation of the new or improved features:
 - 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





Section 1.

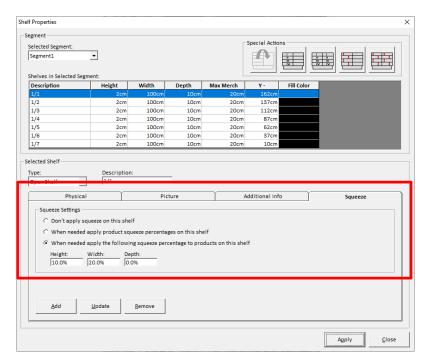
MERCHANDISING





Merchandising - Squeeze (1/6)

- Retail Shelf Planner can now automatically apply a squeeze factor to products to make them fit on the shelf
 - Either in a simple way with a percentage applied to all products on a shelf







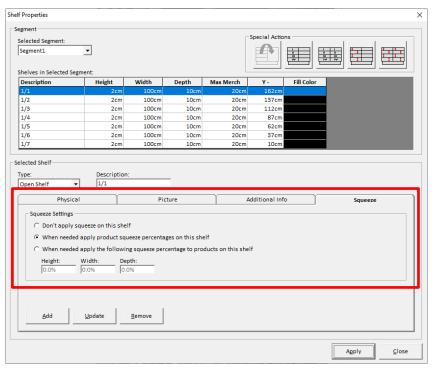


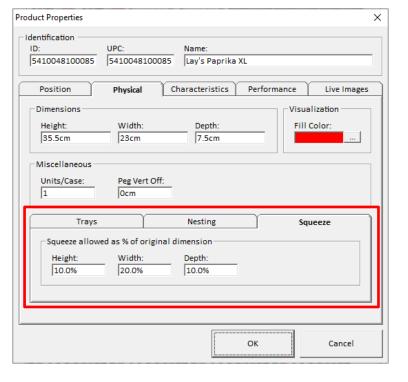




Merchandising - Squeeze (2/6)

- Retail Shelf Planner can now automatically apply a squeeze factor to products to make them fit on the shelf
 - Or in a more advanced way with a percentage defined for each individual product













Merchandising - Squeeze (3/6)

- The squeeze style is set per fixture
 - None
 - No squeeze is applied
 - Based on Product Squeeze Percentages
 - The percentages that are part of the product definition are used. In case of capping or use of other orientations than Front, Retail Shelf Planner will apply the percentage that has been defined for that dimension. (E.g. if a product is merchandised with orientation Left, the Depth Squeeze Percentage is applied for horizontal calculations.
 - Based on Fixture Squeeze Percentages
 - The squeeze percentage defined for the fixture for each dimension is used, irrespective of the orientation with which the product has been merchandised.











Merchandising - Squeeze (4/6)

- How squeeze is applied depends on the fixture type
 - Shelves
 - Horizontally
 - Only if there is not enough space on the shelf. Retail Shelf Planner will apply the same percentage to all
 products, unless there are different percentages allowed.
 - Vertically
 - Initially applied to maximize the number of base units high. Then based on the number of units that fit, the
 actual squeeze percentage is applied.
 - When the capping styles Min Cap, Med Cap or Max Cap are used, squeeze is also applied to the capped units.
 - In Depth
 - Initially applied to maximize the number of base units deep. Then based on the number of units that fit, the
 actual squeeze percentage is applied.













Merchandising - Squeeze (5/6)

- How squeeze is applied depends on the fixture type
 - Hanging Bar
 - In Depth
 - Initially applied to maximize the number of base units deep. Then based on the number of units that fit, the
 actual squeeze percentage is applied.
 - Pegboard
 - In Depth
 - Initially applied to maximize the number of base units deep. Then based on the number of units that fit, the
 actual squeeze percentage is applied.





Merchandising - Squeeze (6/6)

- Exchange with competitive tools
 - Nielsen Spaceman
 - Product settings are loaded and saved
 - Auto Crush shelf setting in Spaceman is loaded and saved when "Product Squeeze" has been selected
 - The **Retail Shelf Planner** option of "Shelf Squeeze" is not available is Spaceman, and thus not saved/loaded
 - JDA / Blue Yonder Space Planning (aka pro/space)
 - Product settings are loaded and saved
 - The shelf setting in pro/space is loaded and saved when "Product Squeeze" has been selected
 - The **Retail Shelf Planner** option of "Shelf Squeeze" is not available is pro/space, and thus not saved/loaded







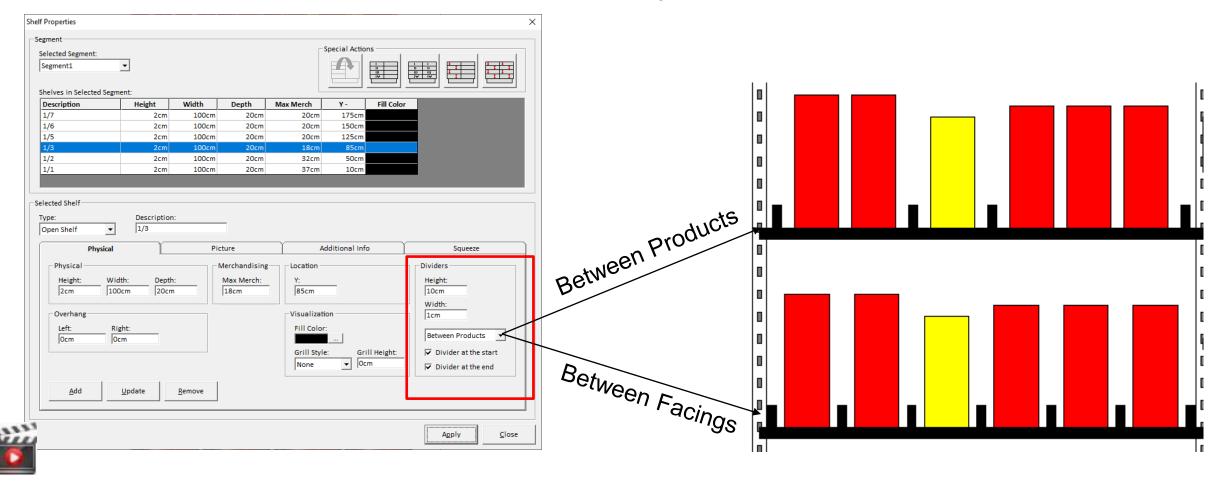






Merchandising - Divider (1/4)

Retail Shelf Planner can now automatically add Dividers on shelves





Ent+



Merchandising - Divider (2/4)

Dividers can be used in combination with spread products

 Horizontal Nesting is applied when dividers are placed between products, not when between facings



 Retail Shelf Planner can combine Squeeze and Dividers















Merchandising - Divider (3/4)

- Dividers are not applicable on Hanging Bars and Pegboards
- The starting divider, if there is one, is placed at the left edge of the shelf, corrected for Left Overhang if applicable
- The ending divider, if there is one, is placed at the right side of the last Position
 - In case of Spread Products, with space remaining on the shelf, it is placed at the right edge
 of the shelf, corrected for Right Overhang if applicable





Merchandising - Divider (4/4)

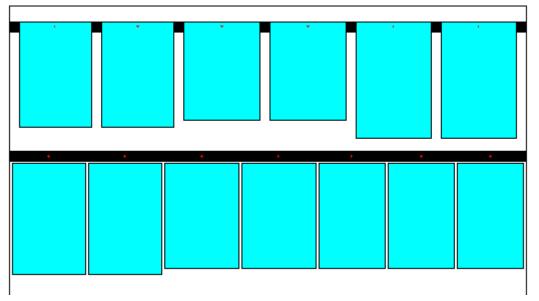
- Exchange with competitive tools
 - Nielsen Spaceman
 - Spaceman does Dividers in another way, and thus the divider shelf settings are not saved/loaded
 - JDA / Blue Yonder Space Planning (aka pro/space)
 - Divider shelf settings are loaded and saved





Merchandising - Peg Hole Vertical Distance

 You now have the option for Peg Hole Vertical distance to be negative, allowing products to hang under a hanging bar (e.g. mimicking a sloping peg, or a twolevel peg)

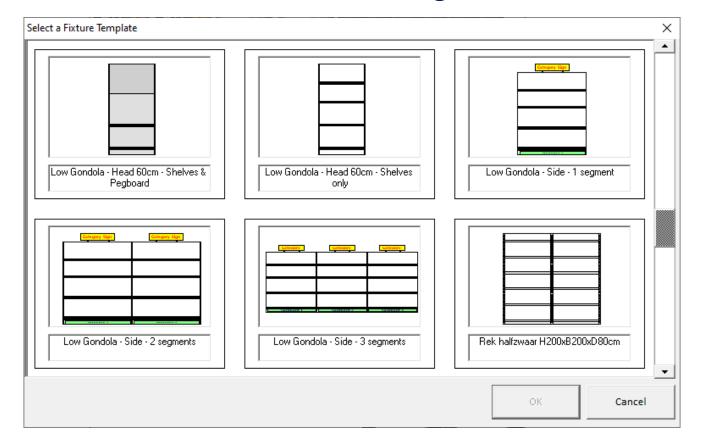






Merchandising - Fixture Template Library

- Fixture Template Library
 - Release 2018 had a limit of 50 fixture templates, and would crash if there were more.
 - This limit has been raised to 240, and the crashing has been eliminated.

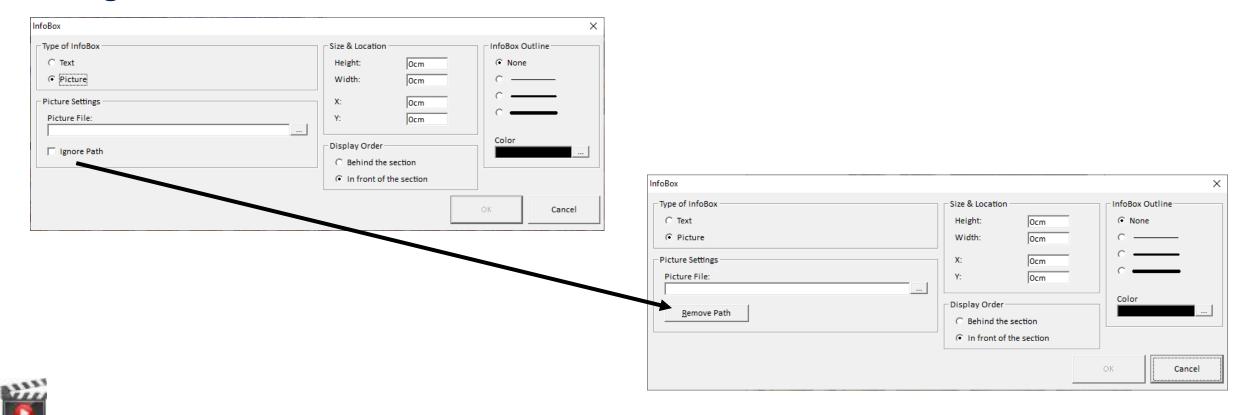






Merchandising - InfoBox Ignore Path

• The Checkbox "Ignore path" in the InfoBox dialog was confusing, it has been changed to a button

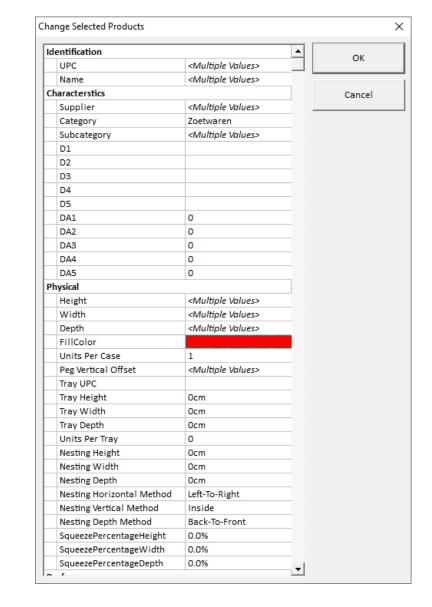






Merchandising - Multi-Change Products

- Multi-change Products
 - Now loads the data for all selected products, not only for the first one
 - The field Movement now accept decimals
 - The field Manual Inv field is now included in the dialog
 - When field had multiple values, that text was displayed in italic. After assigning a value it will no longer incorrectly remained italic, the font is now set to normal

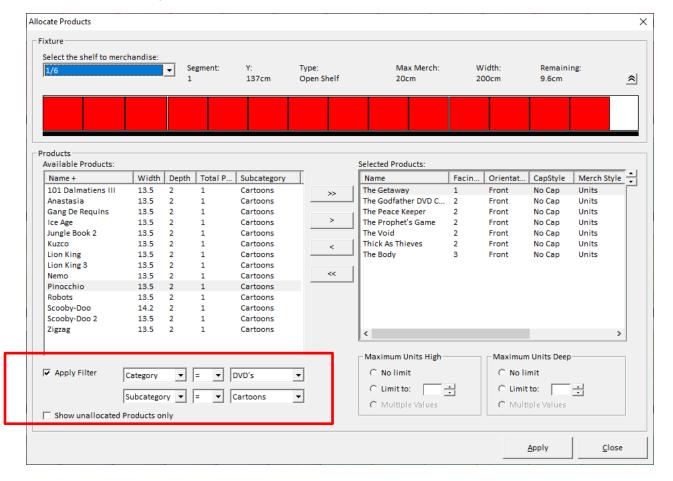






Merchandising - Allocate Products Filtering

• The second filter in the Allocate Products dialog didn't narrow the search (as intended/expected), but expanded it. This has been corrected.







Section 2.

LOADING / SAVING PLANOGRAMS





Loading / Saving Planograms

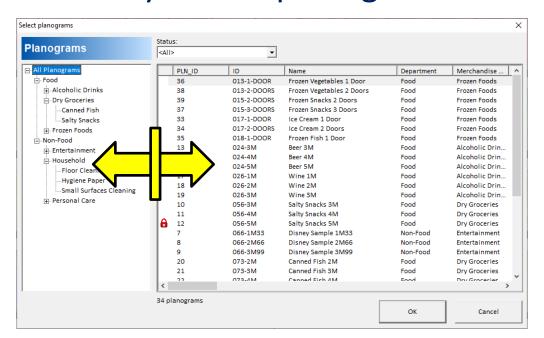
- Planogram save performance
 - Retail Shelf Planner rsp-files: up to 70% faster
- PSA-files that use UPC as the unique identifier are now loading correctly
- Additional checks are done to improve the loading of PLN-files with an incomplete structure (usually created by non-Spaceman applications)





Loading / Saving Planograms

- Planogram save performance
 - Retail Merchandising Center database: up to 99% faster
- The Open Planogram from Database dialog now allows the user to resize the space allocated to the hierarchy vs. the planogram details







Section 3.

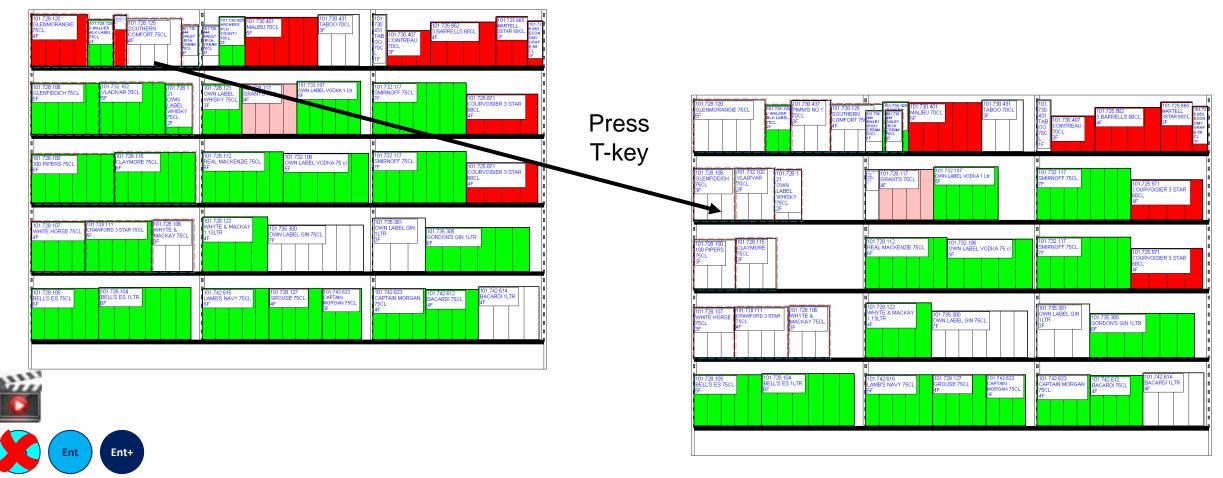
ANALYSIS & OPTIMIZATION





Analysis & Optimization - Force Minimum on selected products

 Optimize facings (Force Minimum) on selected products instead of on all products in the planogram. Short key <T> (for Target)

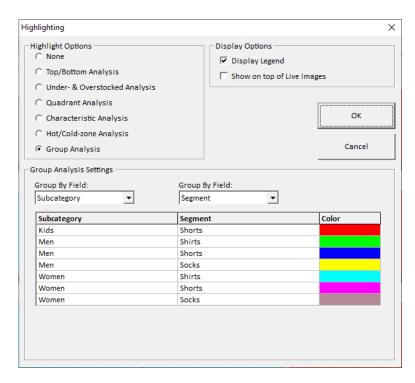


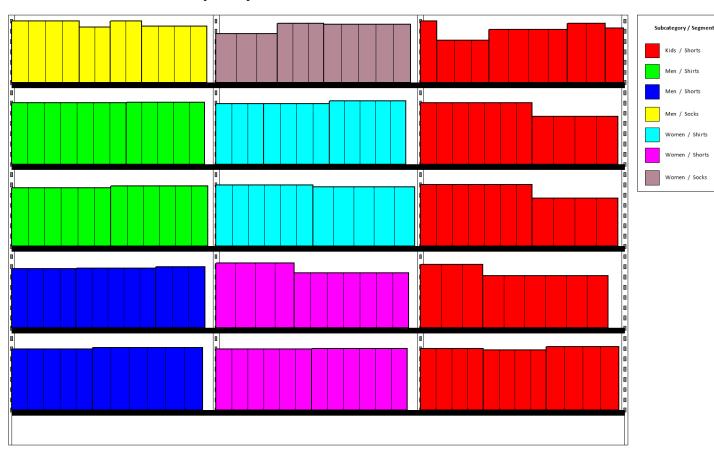




Analysis & Optimization - Highlighting (1/6)

- Highlight Group Analysis
 - You can now select a second variable as a Group By Field









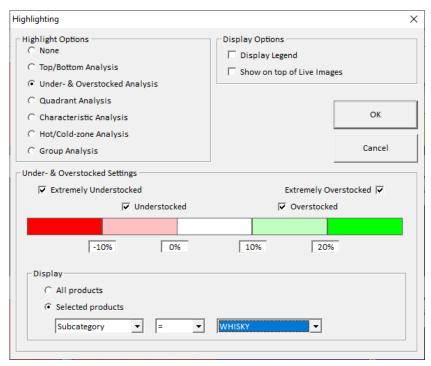


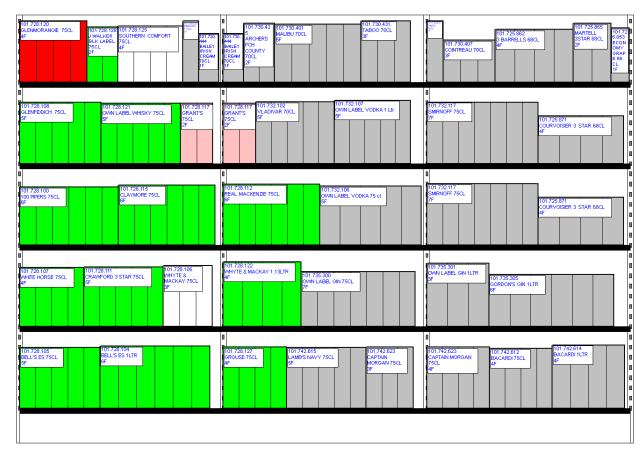




Analysis & Optimization - Highlighting (2/6)

- Highlight Under-/Overstocked Analysis
 - You can now put a filter to focus the highlight on a subset of the products

















Analysis & Optimization - Highlighting (3/6)

Highlight Options

▼ Top/Bottom Analysis

C Characteristic Analysis
C Hot/Cold-zone Analysis

Top/Bottom Analysis Settings

▼ Top Performing

Calculate top/bottom based on C All products

All products
 Selected products

Category

Note: Unallocated Products are excluded from the analysis

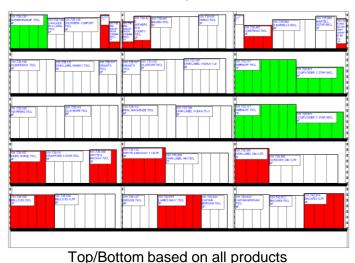
80%

C Group Analysis

Analysis Field: Sales

Under- & Overstocked Analysis
 Quadrant Analysis

- Highlight Top/Bottom Analysis
 - You can now decide how the Top/Bottom needs to be calculated
 - Based on all products
 - Based on Category/Subcategory/...
 - You can now put a filter to focus the highlight on a subset of the products

















Display Legend

▼ ALCOHOLIC DRINKS

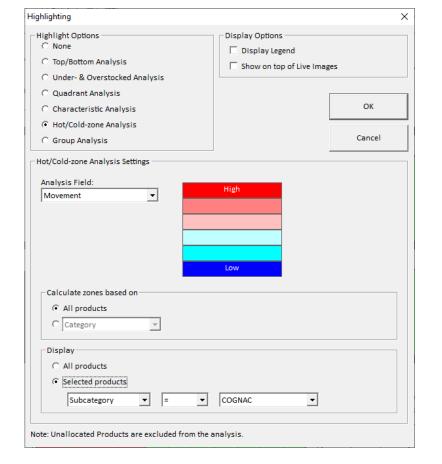
Show on top of Live Images

OK

Cancel

Analysis & Optimization - Highlighting (4/6)

- Highlight Hot/Cold Analysis
 - You can now decide how the Hot/Cold groups needs to be calculated
 - Based on all products
 - Based on Category/Subcategory/...
 - You can now put a filter to focus the highlight on a subset of the products

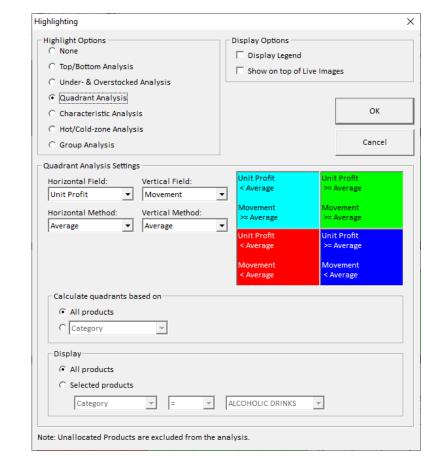






Analysis & Optimization - Highlighting (5/6)

- Highlight Quadrant Analysis
 - You can now decide how the quadrants needs to be calculated
 - Based on all products
 - Based on Category/Subcategory/...
 - You can now put a filter to focus the highlight on a subset of the products
 - The legend has a more compact size, leaving more space for the planogram

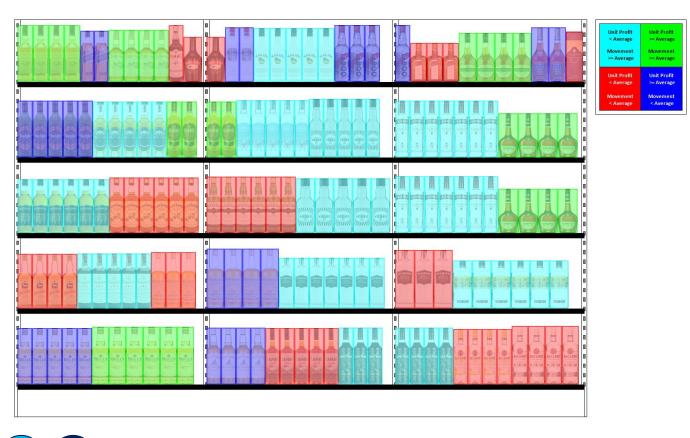


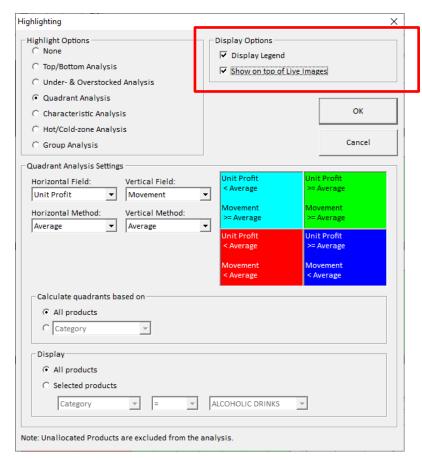




Analysis & Optimization - Highlighting (6/6)

- Option to overlay Highlighting on Live Images
 - This applies to all analytical highlights (i.e. not for merchandising errors)

















Section 4.

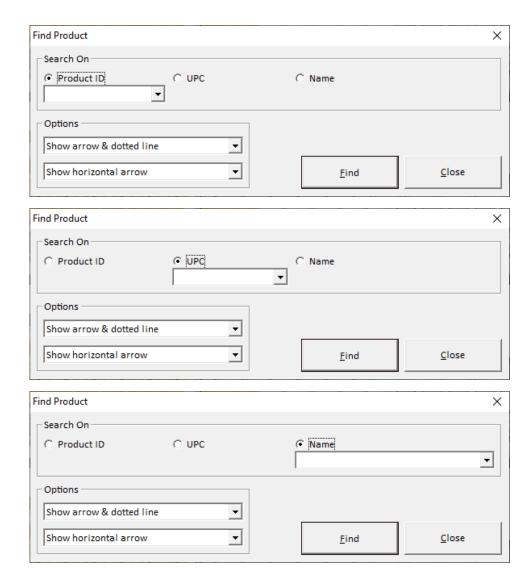
USABILITY





Usability - Find Product (1/3)

- Finding products in the planogram
 - Via Edit-menu or <Ctrl><F>
 - Based on ID, UPC or Name
 - User can type in (or scan) or select from dropdown
 - User can choose how Product/Position is identified
 - Dotted line
 - Horizontal Arrow
 - Vertical Arrow
 - Any combination of those

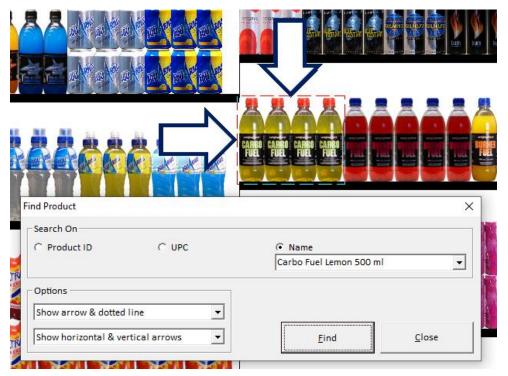






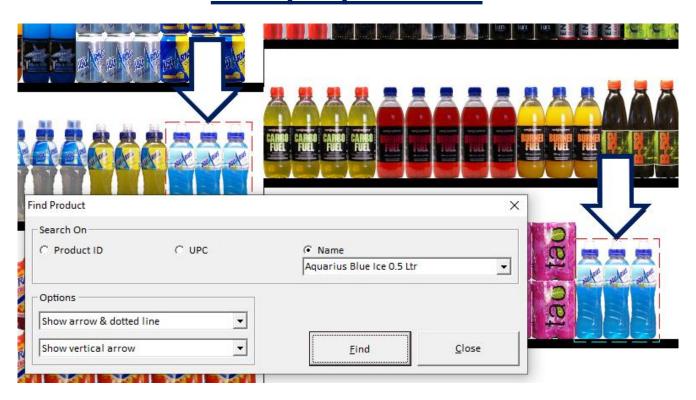
Usability - Find Product (2/3)

• Finding products in the planogram, continued



Single position

Multiple positions











Usability - Find Product (3/3)

• When selecting a product in the Product List, the product is highlighted in the planogram using the same settings as with the Find-feature







Usability - Mouse Scroll

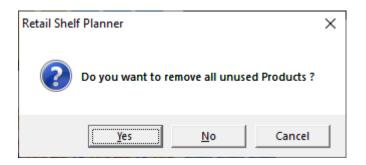
- Scrolling with the mouse wheel is now supported in all dialogs with a grid
 - Shelf
 - Change Selected Products
 - Product List
 - InfoBox List
 - Apply Trends
 - Multi Planogram Analysis
 - Highlight

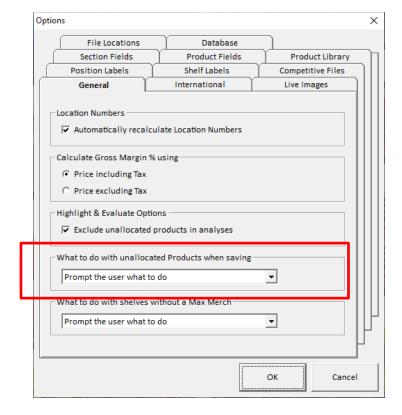




Usability - Remove Unused Products

- Many users forget to remove unused products, which makes working with the planogram unnecessary slower, takes more space, impacts reports, etc.
 - We have therefore added an option to address that when saving the planogram
 - Prompt the user
 - Remove Unused Product automatically
 - Keep the Unused Products



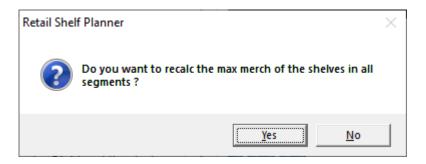


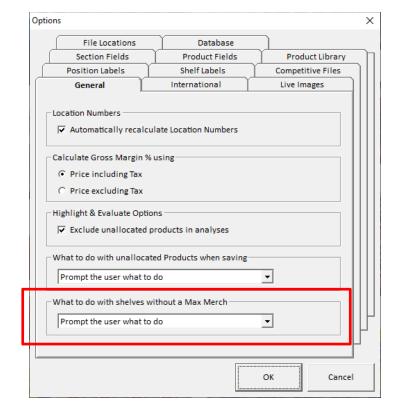




Usability - Calculate Max Merch

- Many users forget to give shelves a Max Merch, which makes placing products on those shelves unnecessary more difficult
 - We have therefore added an option to address that when leaving the Shelf dialog
 - Prompt the user
 - Automatically calculate the Max Merch for all shelves
 - Keep the Max Merch as-is







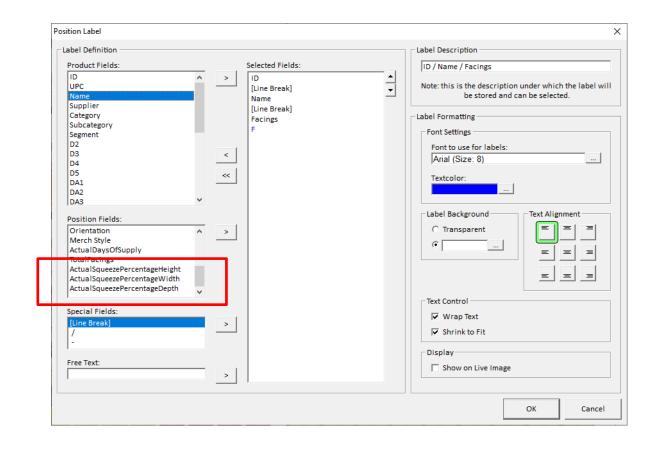






Usability - Actual Squeeze Percentages

- There are three new calculated Position fields
 - Actual Squeeze Percentage Height
 - Actual Squeeze Percentage Width
 - Actual Squeeze Percentage Depth
- They are available to be used in Position Labels

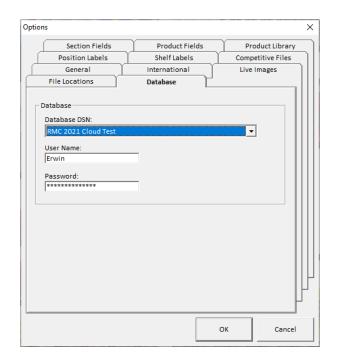






Usability - Retail Merchandising Center Integration (1/2)

- The integration with Retail Merchandising Center has been further improved
 - When selecting the Database tab in Tools-Options, Retail Shelf Planner now automatically loads the User ID and Password for the selected DSN
 - When selecting another DSN in the Database tab in Tools-Options, Retail Shelf Planner now automatically loads the User ID and Password for the selected DSN

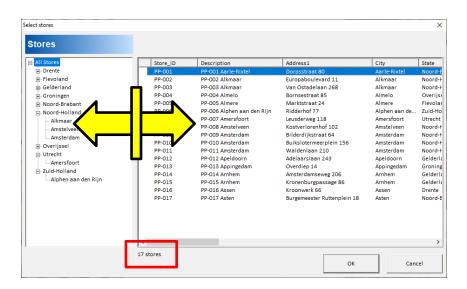


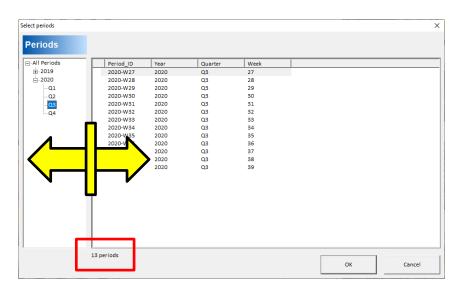




Usability - RMC Integration (2/2)

- The Select Periods and Select Stores dialogs (used in the Importing of performance data from a **Retail Merchandising Center** database) now inform the user about the number of items in the selected node in the hierarchy
- Both dialogs offer the option to resize the space allocated to the hierarchy vs. the Stores/Periods details









Section 5.

MISCELLANEOUS

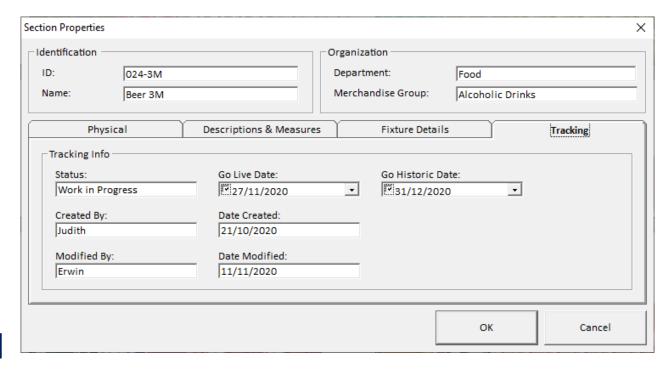




Miscellaneous - Tracking & Life Cycle Info

- Tracking & Life-cycle info in the Section dialog
 - Created By
 - Creation Date
 - Modified By
 - Modified Date
 - Go Live Date
 - Go Historic Date

 This information will not be included when saving the planogram as a file















Miscellaneous - Product Library Error Handling

- Additional checks have been added to dragging products from the product library to ensure the data quality is not creating problems
 - Unfortunately we can't avoid selecting an incorrectly formatted Excel-file
 - Users need to be made aware that it's important to stick to the correct layout
 - No additional columns with non-Retail Shelf Planner fields.
 - Adding columns with the new fields to ensure the layout is correct (and columns not used for other data that is messing up the product info)





Miscellaneous - Bug Fixes (1/3)

- In some "behind the scenes" calculations there was a limitation of 50 characters for ID and UPC. Using a longer ID/UPC would crash the software. This limit has been extended to 250 characters.
- InfoBox images without path didn't load when the planogram was loaded from a Retail Merchandising Center database
- If opening a planogram in a new window fails, the correct error message will now be displayed.





Miscellaneous - Bug Fixes (2/3)

- The Manual Inventory field is now included in the Product List.
- Excel Import using Characteristics Only in combination with the option to ignore fields had a shift in the fields as of TrayHeight. This has been corrected.
- In Excel reporting the Shelf tab now includes the column headers for Left & Right Overhang
- Multi Planogram Excel reports now include the columns Left & Right Overhang





Miscellaneous - Bug Fixes (3/3)

- When copying a shelf with <Ctrl> drag & drop, the values in Left & Right Overhang were lost. This has been corrected.
- When loading psa-files, horizontally nested facings were ignored. They are now properly processed.
- If there was text in the first footer line in the page setup, the text was printed,
 even if Show Footers was not selected
- The tab-order* for all dialogs in the application has been checked and where needed updated

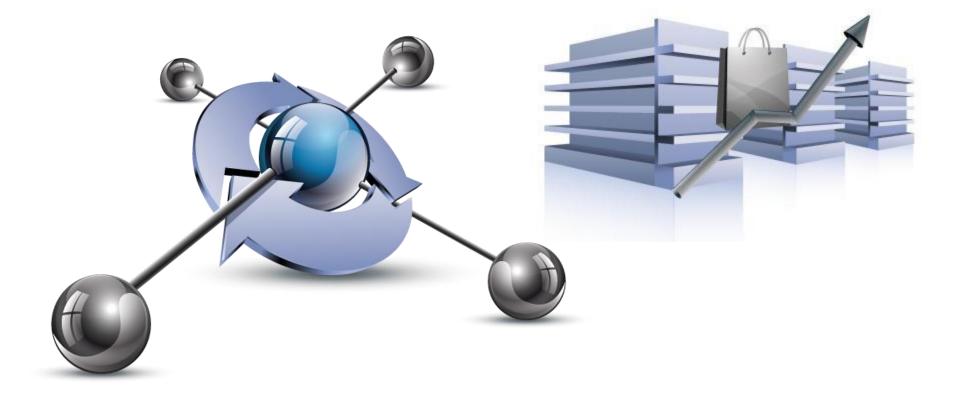






^{*} The tab-order refers to the sequence in which the focus is given to the controls on the dialog when using the <Tab> key to move from object to object.





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