

Retail Shelf Planner 2009

Building Planograms



Section 1.

BUILDING A PLANOGRAM

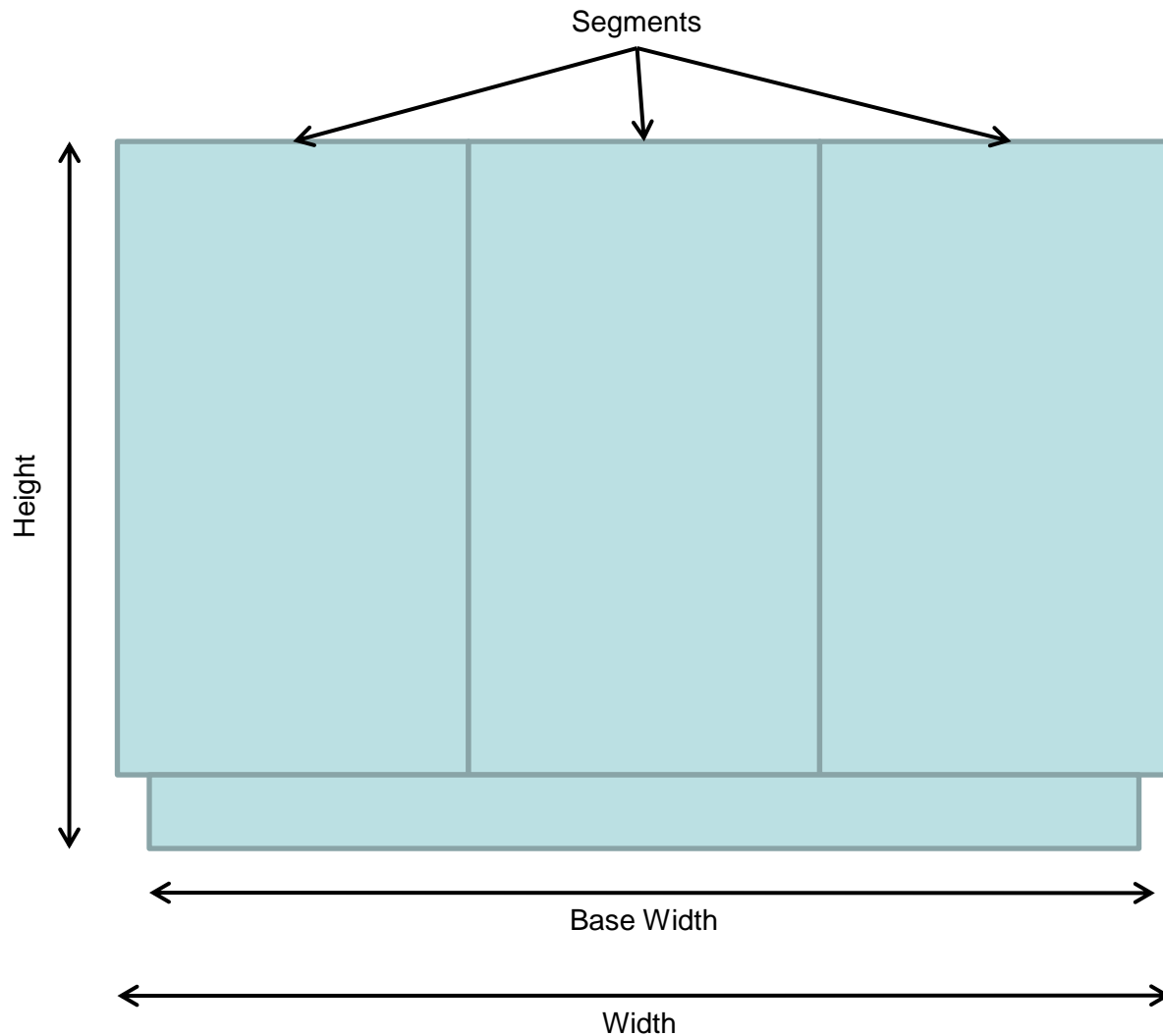


Building a Planogram

- Building a planogram is a simple 4 step process:
 - Create a section
 - Add shelves
 - Add products
 - Place the products on the shelves



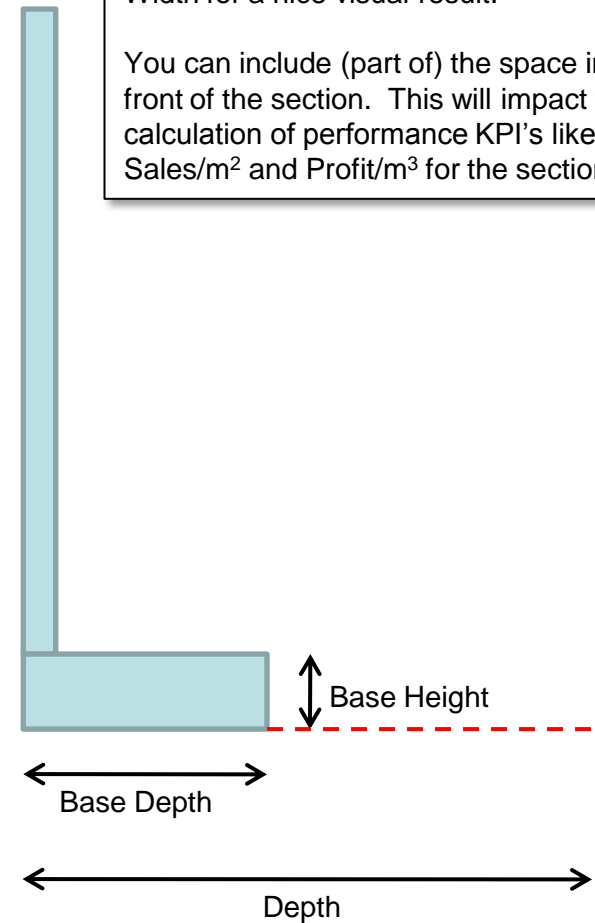
Building a Planogram - Section



Segments are automatically given the same width.

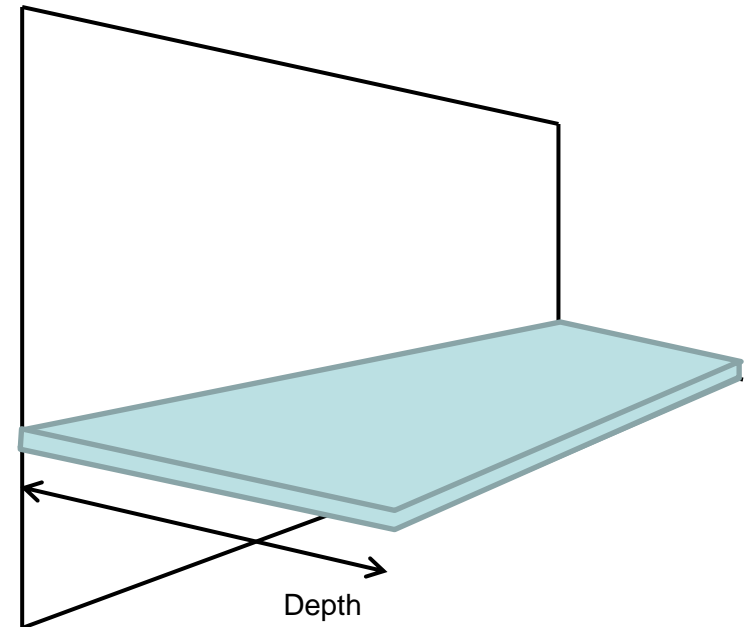
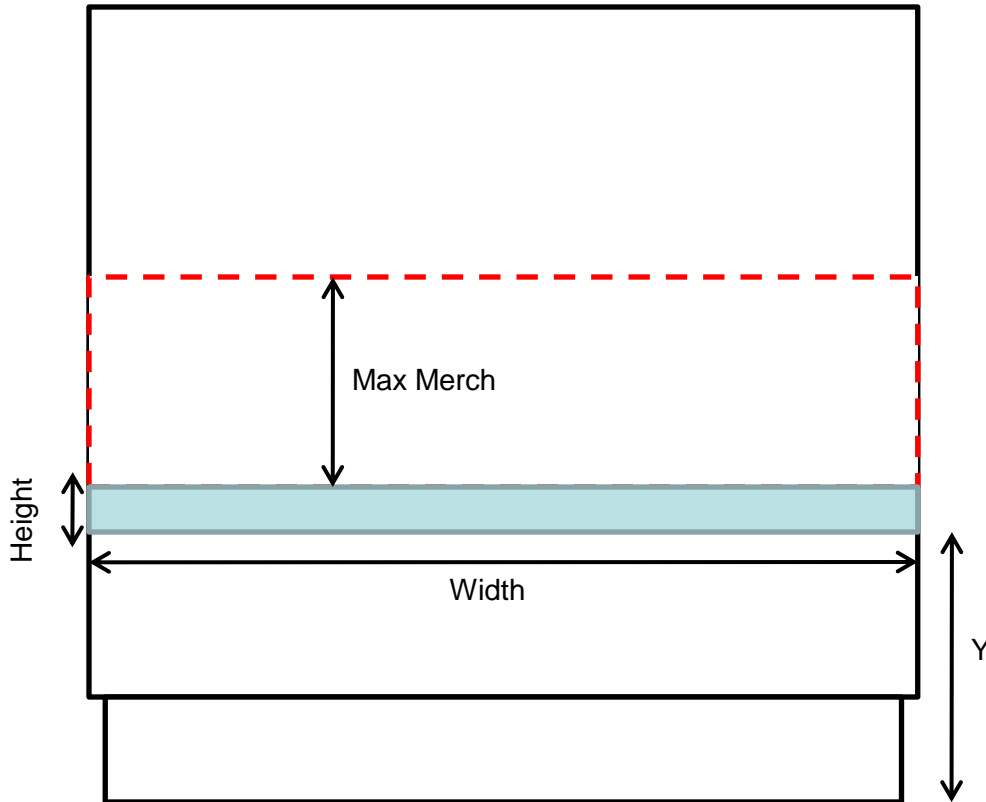
Tip: make Base Width 5 cm shorter than Width for a nice visual result.

You can include (part of) the space in front of the section. This will impact the calculation of performance KPI's like Sales/m² and Profit/m³ for the section.



Building a Planogram - Shelves

Tip: use Max Merch to expand or restrict the amount of merchandising space is available to stack products. If Max Merch = 0, the products will be placed 1 unit high.



Tip: give shelves a logic name (e.g. segment/order) as this will make merchandising them easier. It will also improve your reports.

Building a Planogram - Products

- There are 2 ways to add products to a planogram
 - Input the data in Retail Shelf Planner via the dialog

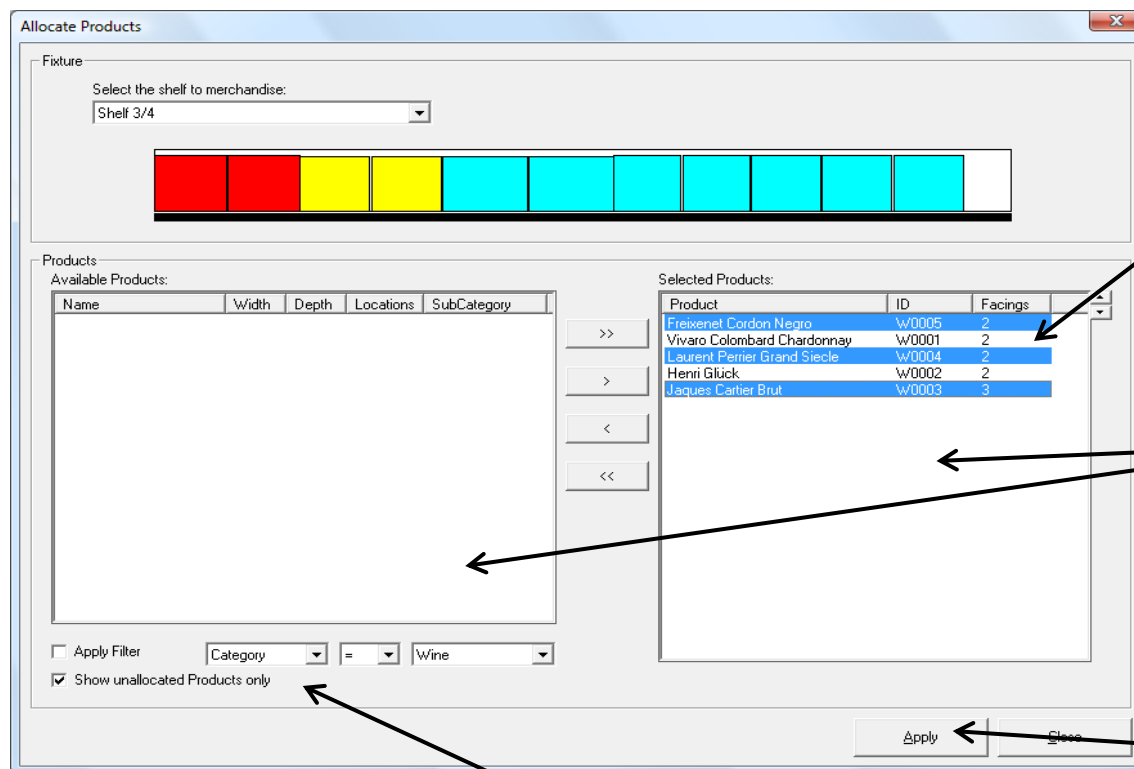
The screenshot shows a 'Product Properties' dialog box with the following fields:

- Identification:** ID, UPC, Name
- Visualization:** Fill Color
- Organization:** Supplier, Category, Subcategory
- Dimensions:** Height (0cm), Width (0cm), Depth (0cm)
- Performance:** Price (€0.00), Cost (0.0%), Tax (€0.00), Units/Case (0), Sales (€0.00), Profit (€0.00), Movement (0), Hist SL (100.0%)
- Additional Descriptions:** Desc 1, Desc 2, Desc 3, Desc 4, Desc 5
- Additional Measures:** Data 1, Data 2, Data 3, Data 4, Data 5

- Import many products at once via an Excel file
 - Use the template in the Sample Files directory

Building a Planogram - Positions

- Once you have a section, one or more shelves and products, you can start merchandising



You can change facings by selecting the product and pressing one of the numeric keys on your keyboard.

Tip: this also works with multiple products selected. (Hold the Ctrl or Shift key to select multiple products.)

Instead of using the <<, <, > and >> buttons, you can also doubleclick in the lists to select or deselect a product.

Tip: if you doubleclick the same product more than once, the facings will increase.

Click apply to confirm your changes.

Tip: if you click Close or select another shelf before clicking Apply your changes will be discarded.

Tip: use the filter options to make selecting the products easier.

Section 2.

CHANGING A PLANOGRAM



Change the fixture

- Adjust section properties via the dialog
- Add/move/remove shelves via the dialog

Section Properties

Identification
ID:
Name:

Dimensions
Height:
Width:
Depth:

Base
Height:
Width:
Depth:

Organization
Department:
Merchandise Group:

Segments
Segments:

Visualization
Fill Color:

Additional Descriptions
Desc 1:
Desc 2:
Desc 3:
Desc 4:
Desc 5:

Additional Measures
Data 1:
Data 2:
Data 3:
Data 4:
Data 5:

OK

Shelf Properties

Segment:

Description	Height	Width	Depth	Max Merch	Y	Fill Color
1/1	2cm	100cm	20cm	20cm	10cm	
1/2	2cm	100cm	20cm	20cm	37cm	
1/3	2cm	100cm	20cm	20cm	62cm	
1/4	2cm	100cm	20cm	20cm	87cm	
1/5	2cm	100cm	20cm	20cm	112cm	
1/6	2cm	100cm	20cm	20cm	137cm	
1/7	2cm	100cm	20cm	20cm	157cm	

Description: Height: Width: Depth: Max Merch: Y: Fill Color:

Add Update Remove Apply Close

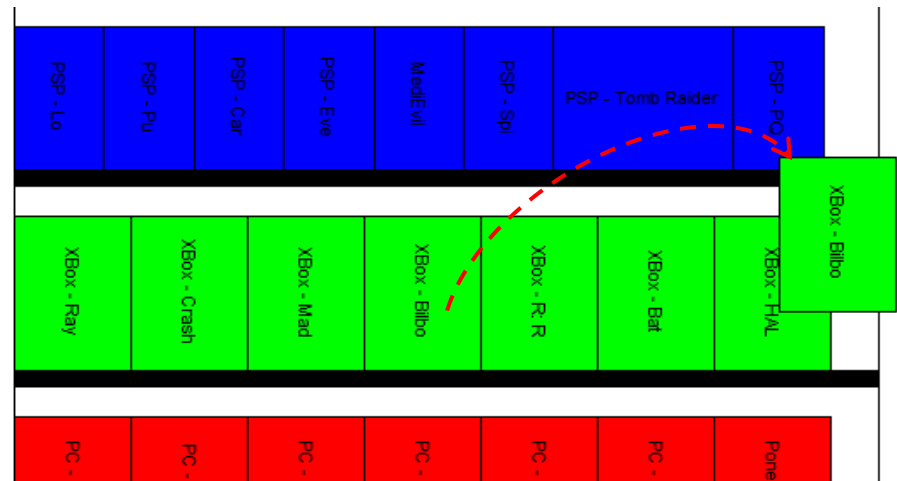
Adding / Updating Products

- Use the Product dialog or Excel Import to add new products or update existing ones
 - Retail Shelf Planner uses the ID to match products
- Use the Positions dialog to place the new products on shelves
 - You can also use this dialog to change facings and change the order of products on the shelves, but it is quicker to do that directly in the planogram (see next page)



Change Location & Facings

- Drag & drop products to a new location
 - The new location is determined by the position of the mouse-pointer
- Hover the mouse over a product and press the numeric keys to change facings
 - Hitting the 0-key or Del-key will remove the position
 - The + key adds a facing
 - The – key subtracts a facing



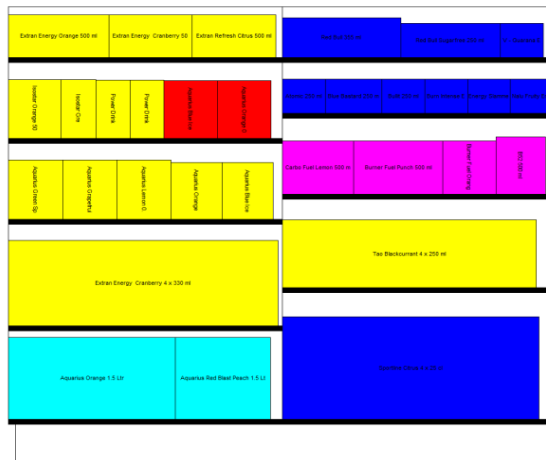
Section 4.

DISPLAY & PRINT THE PLANOGRAM

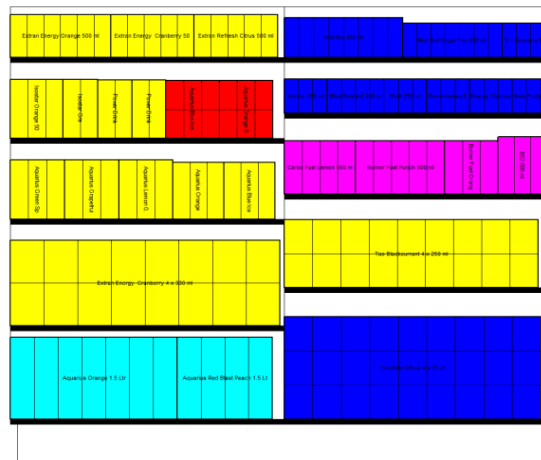


Displaying Products

- Retail Shelf Planner has 3 ways to display the products in the planogram:



Blocks. Each position is displayed as one block. It's not possible to see the individual facings.



Units. Each position is displayed as one block with finer inside lines to display the individual facings.



Live Images. Each facing is displayed using an image for a realistic view of the section.

Display the Planogram

- Products can be aligned to the left
 - Easiest when working on the planogram
- Or spread across the shelves
 - For a nicer presentation when the planogram is finished



Print the Planogram

- The planogram is printed in the way you're viewing it on screen: Blocks, Units, Live Images, ...
- Via the Page Setup dialog you can add
 - Title & Subtitle
 - Footers
 - Date & Time

