

# Creating planogram output-decks

COMBINE RETAIL SHELF PLANNER & POWERPOINT



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Combine Retail Shelf Planner & PowerPoint



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## Author's note

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## Introduction

Creating professional looking planograms is one thing, sharing the results with others a completely other challenge. Many people either miss the opportunity to communicate the results of their hard work in the most professional way, or spend too many hours creating the output needed to pass on the information properly.

Therefore we decided to include the option to create "advanced" output using Microsoft PowerPoint templates in the Enterprise edition of **Retail Shelf Planner**.

When we talk about "advanced" output, you can think about:

- ✓ Layouts with your corporate color-scheme, logo's, etc.
- ✓ Multiple views of the planogram on a single page
- ✓ Splitting the planogram in segments
- ✓ Planogram view and report on the same page
- ✓ Multiple pages, optionally with different layouts, in a single output-deck
- ✓ ...

Using standard PowerPoint functionality, you can define the desired layout(s) in your own templates, which will give you a number of benefits:

- ✓ Consistent output matching corporate style
- ✓ Optimized content for maximum results in communicating your work
- ✓ Efficient use of your time to create a wide range of planogram output
- ✓ Easy sharing of planogram info with people who don't have **Retail Shelf Planner** or another planogramming tool

This white paper will explain how you can combine the planogramming power of **Retail Shelf Planner** with the presentation capabilities of PowerPoint.

We trust that you'll find it helpful and are ready to answer any questions you may have after reading it. Send them to [info@retailshelfplanner.com](mailto:info@retailshelfplanner.com) and we'll get back to you as soon as possible.

Erwin Bergsma  
*Managing Director*



# Creating planogram output-decks

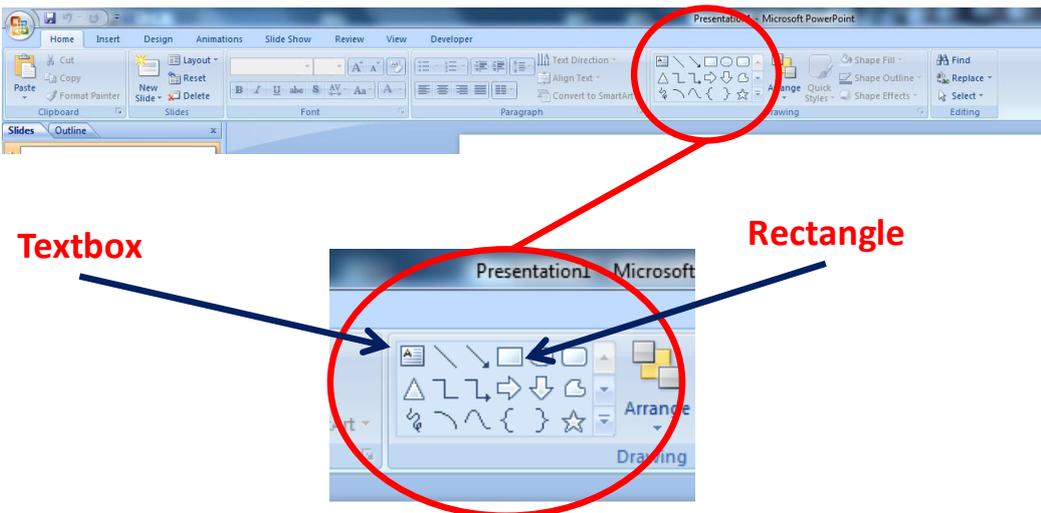
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## Creating your own templates

**Retail Shelf Planner** installs a set of sample templates that you can use as-is, but it's also possible that you create your own templates. You don't need any technical knowledge to do this. Just some basic knowledge on PowerPoint features will be sufficient, as the templates are created using standard PowerPoint functionality.

You can place anything on the template's page(s), think about logo's, corporate messages, etc., but there are two objects-types that you can use to pass on instructions to **Retail Shelf Planner** about which planogram information you want it to place on the page, and how:

- ✓ **Textbox-shape**, used to instruct **Retail Shelf Planner** about
  - Texts such as title, subtitle, department, etc.
  - Splitting the planogram in segments
  - Reports
- ✓ **Rectangle-shape**, used to instruct **Retail Shelf Planner** about
  - Planogram-views



In the following paragraphs we will explain the usage of each of these objects.



## Planogram Texts

Using a PowerPoint textbox, you can display pieces of information that are included in the planogram. The keyword that you type in the textbox on the template's slides, defines which piece of information is displayed.

The table below shows you the various options:

Keyword	Information to be displayed
Title	The contents of the Title-field from the Page Setup.
Subtitle	The contents of the Subtitle -field from the Page Setup.
Footer1	The contents of the Footer1-field from the Page Setup.
Footer2	The contents of the Footer2-field from the Page Setup.
Footer3	The contents of the Footer3-field from the Page Setup.
ID	The contents of the ID-field from the Section definition.
Name	The contents of the Name-field from the Section definition.
Department	The contents of the Department-field from the Section definition.
MerchandiseGroup	The contents of the Merchandise Group-field from the Section definition.
Desc1	The contents of the Desc1-field from the Section definition.
Desc2	The contents of the Desc2-field from the Section definition.
Desc3	The contents of the Desc3-field from the Section definition.
Desc4	The contents of the Desc4-field from the Section definition.
Desc5	The contents of the Desc5-field from the Section definition.
Data1	The contents of the Data1-field from the Section definition.
Data2	The contents of the Data2-field from the Section definition.
Data3	The contents of the Data3-field from the Section definition.
Data4	The contents of the Data4-field from the Section definition.
Data5	The contents of the Data5-field from the Section definition.
TopBottomField	The field used for the Top/Bottom Highlight.
TopPercentage	The percentage used for the top-part of the Top/Bottom Highlight.
BottomPercentage	The percentage used for the bottom-part of the Top/Bottom Highlight.
ExtremeUnder	The percentage used for the Extreme Under part of the Inventory Highlight.
Under	The percentage used for the Under part of the Inventory Highlight.
Over	The percentage used for the Over part of the Inventory Highlight.
ExtremeOver	The percentage used for the Extreme Over part of the Inventory Highlight.
HorizontalField	The field used for the horizontal axes in the Quadrant Highlight.
HorizontalMethod	The method used for the horizontal axes in the Quadrant Highlight.
HorizontalValue	The constant value used for the horizontal axes in the Quadrant Highlight.
VerticalField	The field used for the vertical axes in the Quadrant Highlight.
VerticalMethod	The method used for the vertical axes in the Quadrant Highlight.
VerticalValue	The constant value used for the vertical axes in the Quadrant Highlight.
HotColdField	The field used for the Hot/Cold Highlight.
GroupByField	The field used for the Group By Highlight.



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## Planogram Texts, continued



**Retail Shelf Planner** will replace the keyword in the textbox with the value from the corresponding field, but will leave all formatting and PowerPoint assigned behavior intact. This way you can:

- ✓ Select the font-face, -type, -size, -color, horizontal and vertical alignment, etc. that you want the final text to be displayed in.
- ✓ Set the background-color, border-color, -width, etc.
- ✓ Select the option to resize the text to fit the box (if your version of PowerPoint supports this).

### Example of a template-layout:

<b>Title</b>
<i>SubTitle</i>
<b>Retail Shelf Planner</b> <small>Copyright © Global Retail Business Solutions Ltd.</small>


In the resulting output, the text in the planogram page-setup Title-field will be at the top of the page in bold, blue and a large font. The Subtitle will be below in red and italic. The texts and the logo at the bottom will stay as they are.

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## Planogram Views

Using a PowerPoint rectangle shape, you can allocate space on the page where **Retail Shelf Planner** will place a picture of the planogram. Just like in **Retail Shelf Planner's** planogram-window, it will scale the planogram automatically to fit within the available space.

Note: the first word in the rectangle shape has to be **Planogram** for **Retail Shelf Planner** to know that it should place a planogram-view in the allotted space. If the text starts with a different word, **Retail Shelf Planner** will leave the shape as-is on the slide.

The word **Planogram** can be followed by various other instructions to define the way **Retail Shelf Planner** has to display the planogram. See the table below for the possible keywords:

Text	Effect on planogram display
BluePrint	Will display the planogram as a "technical drawing", i.e. without the positions. If this keyword is found, <b>Retail Shelf Planner</b> will not check for keywords related to the way positions are displayed. Only the keyword FixelLabel will be evaluated.
Blocks	Displays the positions as solid colored blocks.
Units	Displays each individual unit of the positions as a separate solid colored block.
Live	Displays the appropriate Live Images for each position.
Outlines	Displays the blocks or units using the product color as the outline, leaving the inside white. Only applicable in combination with the keywords Blocks and Units.
Spread	Spreads the positions evenly across the shelf or hanging bar. When omitted, the positions will be aligned to the left.
Legend	Defines if the legend should be displayed when one of the below highlight options is used.
TopBottom	Displays the planogram using the Top/Bottom highlight.
UnderOver	Displays the planogram using the Inventory highlight.
Quadrant	Displays the planogram using the Quadrant highlight.
HotCold	Displays the planogram using the Hot/Cold highlight.
GroupBy	Displays the planogram using the Group By highlight.
PositionLabel	Defines the label that <b>Retail Shelf Planner</b> should use for the positions.
FixelLabel	Defines the label that <b>Retail Shelf Planner</b> should use for the shelves.



During the processing of the PowerPoint output, **Retail Shelf Planner** will delete the rectangle-shape, and replace it with an image of the planogram of the exact same size, in the exact same location. The formatting of the rectangle-shape, such as font-size, -color, background-color, etc., therefore is irrelevant. Feel free to use any formatting that appeals to you.



When the keyword **BluePrint** is not used, and none of the keywords **Blocks/Units/Live** are included in the keywords, **Retail Shelf Planner** will use the setting in the active session of the software.



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## Planogram Views, continued



**Retail Shelf Planner** will use the defaults for the analysis variables as set by the user, and stored in the registry, when displaying the planogram in highlight colors.



When displaying the planogram in highlight colors is combined with the keyword **Live**, **Retail Shelf Planner** will display the positions as if the keyword **Units** was used.



The syntax for the PositionLabel keyword is: **PositionLabel:<ABC>** where ABC is the description of the label. If **Retail Shelf Planner** can't find a label with that description, no label will be printed. Using the combination **PositionLabel:<None>** instructs **Retail Shelf Planner** to display the planogram without labels for the positions. If the keyword PositionLabel is not included in the instructions, the label that is used in the active session will be used.



The syntax for the FixelLabel keyword is: **FixelLabel:<ABC>** where ABC is the description of the label. If **Retail Shelf Planner** can't find a label with that description, no label will be printed. Using the combination **FixelLabel:<None>** instructs **Retail Shelf Planner** to display the planogram without labels for the shelves. If the keyword FixelLabel is not included in the instructions, the label that is used in the active session will be used.

### Example of a template-layout:

<b>Title</b>
<i>SubTitle</i>
Planogram Blocks Spread PositionLabel:<ID/Name> FixelLabel:<None>
<b>Retail Shelf Planner</b> Copyright © Global Retail Business Solutions Ltd.





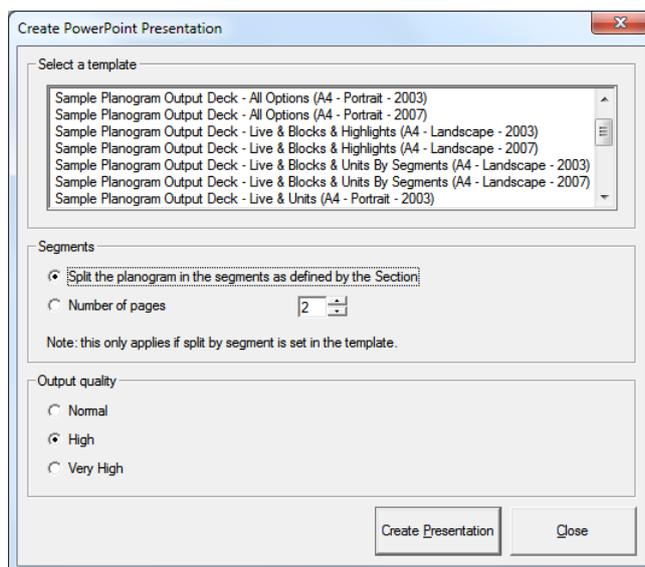
### Split by Segments

The PowerPoint output feature offers an interesting capability for people who:

- ✓ Create planograms with many segments.
- ✓ Create planograms with (loads of) small products.
- ✓ Want to provide close-up / detailed views of the planogram.

The instruction to split the planogram in segments, breaks down in two parts:

- ✓ To indicate that a slide within the template has to be used to display the planogram split into various segments, you have to include a Textbox-shape with the text "**Split by Segment**" in it.
- ✓ In the Create PowerPoint Presentation dialog, you have to define in which way **Retail Shelf Planner** has to split the planogram:
  - A page for each segment as defined in the Section dialog
  - The Section split across a number of pages



The Textbox-shape will be deleted during processing. So it is irrelevant how it is formatted, and where it's placed on the page.



The planogram is always evenly split across the pages.



The higher the output quality you select, the more detailed the resulting images in the presentation will be. And therefore: the bigger the resulting size of the file.



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## Split by Segments, continued

*Example of a template-layout:*

<b>Title</b>	
<i>SubTitle</i>	
<div style="background-color: yellow; display: inline-block; padding: 2px;">Split by Segments</div>  <p>Planogram Units Spread PositionLabel:&lt;LocationID&gt; FixelLabel:&lt;None&gt;</p>	
<b>Retail Shelf Planner</b> <small>Copyright © Global Retail Business Solutions Ltd.</small>	

# Creating planogram output-decks



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## Reports

**Retail Shelf Planner** offers an option to provide additional information in the form of a table. You can select between the following reports:

- ✓ **LocationID**, creates a report with the columns Location ID, Product ID, Name, Facings, Total Units
- ✓ **ProductsByShelf**, creates a report with the columns Product ID, UPC, Name, Facings, Total Units sorted by shelf

To instruct **Retail Shelf Planner** to place a report on the page, you insert a PowerPoint Textbox with the keyword **Report:<ABC>** on the page, where ABC is the name of the report as in the list above.



The resulting report will be at the same location as the textbox and will have the same width. The height will automatically be adapted to fit all data.



The resulting report will use the same font-face and -size as the keyword in the textbox.



If you are using a PowerPoint version pre-2003, the report will be created in the textbox with the data separated by tabs. As of version 2003, the report will be displayed as a native PowerPoint table, which will automatically replace the textbox with the instructions for **Retail Shelf Planner**.



Depending on the version of PowerPoint, there is a limitation of the number of rows in a table:

- ✓ Version 2003: 25 rows
- ✓ Version 2007: 75 rows
- ✓ Version 2010: 75 rows
- ✓ Version 2013: 75 rows

If there are more products in the list than available rows, the last product(s) are not included in the report.



If your version of PowerPoint supports tables, the resulting report will automatically get the default style that was set for your install of PowerPoint. The style will be based on the color scheme that was stored in the template. Refer to the PowerPoint documentation for more information on styles and color schemes.



When you place a report on a page that also has the "**Split by Segment**" keyword, the page will be created for each segment, and the report on each page will only include the products that start in the segment on that page.



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## Reports, continued

*Example of a template-layout:*

Title	
SubTitle	
<p>Split by Segments</p> <p>Planogram Units Spread PositionLabel:&lt;LocationID&gt; FixelLabel:&lt;None&gt;</p>	<p>Report-&lt;LocationID&gt;</p>
<p><b>Retail Shelf Planner</b> Copyright © Global Retail Business Solutions Ltd.</p>	





## Additional Information

Retail Shelf Planner offers an option to provide additional information about the date and/or time the output was created, or the segment that is on the page when split by segments is used. The following keywords are available for this:

### Date of output creation:

Keyword	Information to be displayed
DATE_SHORT	The date the output was created using the Windows' short date format
DATE_LONG	The date the output was created using the Windows' long date format

### Time of output creation:

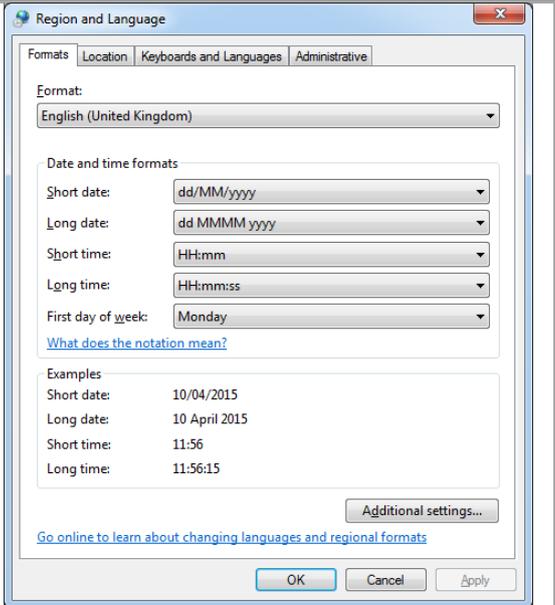
Keyword	Information to be displayed
TIME_SHORT	The time the output was created using the 24-uur format (hh:mm)
TIME_LONG	The time the output was created using the Windows' long time format

### Segment information:

Keyword	Information to be displayed
SEGMENT_SHORT	Just the segment-number. E.g. <b>1</b>
SEGMENT_MEDIUM	E.g. <b>2 of 5</b>
SEGMENT_LONG	E.g. <b>Segment 3 of 4</b>



Windows' date and time settings are done through the Region and Language option in the Control Panel.





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## Multi-page decks

You can combine all these capabilities in a multi-page template, so that you can create a comprehensive output-deck with a single click of the mouse!

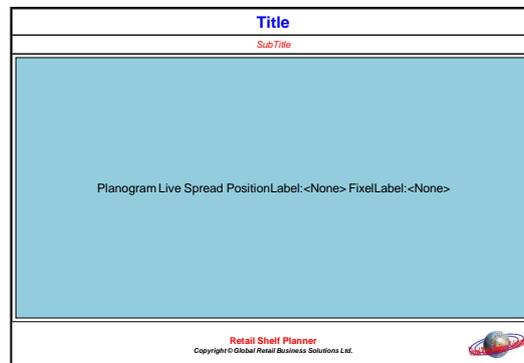
Think about output-decks for different purposes:

- ✓ With a focus on the commercial ideas behind the planogram (e.g. Live Image, Color Blocks, Group By-analysis)
- ✓ For operational people / implementation in the stores (e.g. by segment including report with more details)
- ✓ To support analytical discussions about inventory, margin, etc. (e.g. with Under/Over and Quadrant)
- ✓ ...

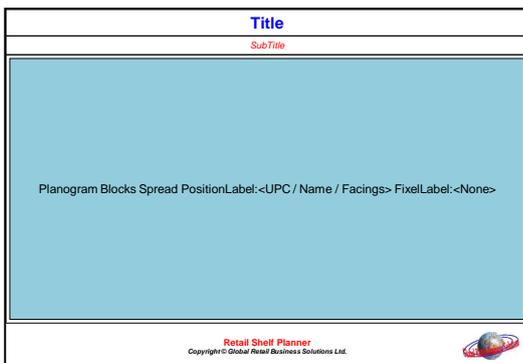
For example, you can create the following template:



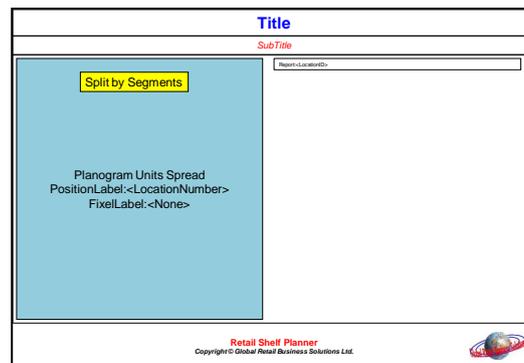
Page 1. The cover page



Page 2. Full planogram with Live Images



Page 3. Full planogram in Blocks



Page 4. Planogram by segment + report

When we select this template, and pick the option "Split the planogram in the segments as defined by the Section" in the Create PowerPoint Presentation dialog, we will get the following output-deck for the Energy Drinks planogram in the samples that install with **Retail Shelf Planner**:

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## Multi-page decks, continued

**Retail Shelf Planner**  
Sample Output-deck

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**Retail Shelf Planner**  
*Creating professional planograms in a budget- and user-friendly way*

Retail Shelf Planner  
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**Retail Shelf Planner**  
*Creating professional planograms in a budget- and user-friendly way*

Retail Shelf Planner  
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**Retail Shelf Planner**  
*Creating professional planograms in a budget- and user-friendly way*

Layer	ProductID	Name	Facing	Total Units
1	87133173	Eden Energy Charge 500 ml	5	48
2	87133255	Eden Energy Cranberry 500 ml	5	40
3	87133219	Eden Natural Citrus 500 ml	5	40
4	761210001927	Isler Charge 500 ml	3	21
5	317598181424	Isler Green Apple 500 ml	2	14
6	671738805257	Power Drink Charge 0.5 Ltr	2	16
7	871738805251	Power Drink Max de Fruit 0.5 Ltr	2	16
8	54400001645	Aquaria Blue Ice 0.5 Ltr	3	42
9	54400002219	Aquaria Charge 0.5 Ltr	3	42
10	54400012464	Aquaria Green Splash 0.5 Ltr	3	21
11	50400065	Aquaria Orppofruit 0.5 Ltr	3	21
12	5017254	Aquaria Lemon 0.5 Ltr	3	21
13	5440001	Aquaria Charge 0.5 Ltr	3	24
14	54400012811	Aquaria Blue Ice 0.5 Ltr	3	24
15	87133001453	Eden Energy Cranberry 4 x 330 ml	8	64
16	54400012387	Aquaria Charge 1.5 Ltr	7	35
17	54400014481	Aquaria Red Blue Peach 1.5 Ltr	4	20

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**Retail Shelf Planner**  
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Layer	ProductID	Name	Facing	Total Units
18	500148005482	Red Bull 250 ml	8	72
19	5010200	Red Bull Sugarfree 250 ml	7	63
20	6450587	V. Ganten Energy 250 ml	3	27
21	54200003082	Alpine 250 ml	3	27
22	871330400214	Blue Energy 250 ml	14	98
23	872600002174	Bulk 250 ml	3	27
24	54400008015	Burn Intense Energy 0.25 Ltr	3	27
25	871624002687	Energy Elements 250 ml	3	27
26	54400001465	Mate Pure Energizer 0.25 Ltr	3	27
27	541301617870	Carlo Fuel Lemon 500 ml	4	28
28	541301617717	Burner Fuel Peach 500 ml	5	35
29	541301617864	Burner Fuel Orange 500 ml	3	21
30	8714800013765	BS2 500 ml	3	24
31	5413060103037	The Blackcurrent 4 x 250 ml	9	72
32	8713300000000	Spartan Citrus 4 x 250 ml	9	72

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## Template Location

**Retail Shelf Planner** output templates are stored in a folder inside the installation-folder. The location of the installation-folder depends on the version of Windows that you are using, and if the default path for installation has been used or not. See the table below for the most likely location of the installation-folder:

Operating System	Location
Windows XP	C:\Program Files\GRBS Solutions\Retail Shelf Planner
Windows Vista, 7 or 8	C:\Program Files (x86)\GRBS Solutions\Retail Shelf Planner

Inside the installation-folder, you'll find a folder called **Templates**, with a subfolder for every language in which **Retail Shelf Planner** is available.



If you save your templates in the Templates-folder, they will be available in every language you use **Retail Shelf Planner**. If you save the templates in one of the language sub-folders, they will only be available when you use **Retail Shelf Planner** in that language.



The templates are listed alphabetically in the Create PowerPoint Presentation dialog. So with the name you're giving your template, you can influence the position it shows up in the list.



Depending on the security settings on your PC, you may need administrator rights to save templates in the appropriate folder.

## Template Format

The templates have to be stored in the PowerPoint template format, with the extension pot, potx, or potm.

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## **About the author:**

Erwin Bergsma is a Dutch national with an international mindset. He has an extensive background in the retailing industry that started back in the 1980's with a regional chain of bookstores in the Netherlands. Later he worked in the buying and merchandising department of Albert Heijn, the largest Dutch grocery-retailer.

During a 14 year career in consulting, account management and marketing with the global market information specialist A.C.Nielsen he built up an in-depth knowledge in the areas of data analysis, Category Management, floorplanning, spacemanagement and assortment planning. Having had local positions in the Netherlands, as well as European and global Marketing positions, Erwin has a broad understanding of the differences and similarities of retailing in many parts of the world.

In 2005 he founded Global Retail Business Solutions, providing specialist software applications and consulting services to companies in the FMCG and CPG business.

Over the years he has worked with many retailers and suppliers, ranging from relatively small locals to large multinationals, in virtually all distribution channels, including Food, Drug, Do-It-Yourself, Convenience, and Mass Merchandising, providing him with a unique and multi-faceted view on the retailing business.



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*Global Retail Business Solutions is a Belgium based company with 25 years of experience in data analysis, Category Management, assortment-, floor- and space-planning. Our software and services are delivered directly and through partners to clients around the globe.*

*In those 25 years we worked with hundreds of local and international retailers and suppliers in Food and Non-Food, guiding them in the implementation and successful use of specific software applications supporting their sales, marketing, buying and merchandising departments.*

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