

2.0.0

PromoPlanning

User Manual



Release 0 – April 2020

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1 INTRODUCTION

1.1 Introduction

Promo Planning is an easy-to-use, web application that is designed to support marketing specialists in the management of promotions. Increased digitalization implies huge quantities of data, and the need to manage vast numbers of assorted promotions across different timescales, while exercising maximum control over individual campaigns and events. This is at odds with traditional approaches to promotions management that either fail to make any provision at all for storing promotions data or employ unstructured Excel spreadsheets with a multitude of data entry formats and layouts.

It is essential to be able to distinguish between normal consumer demand and promotion-related sales, with a view to assessing the effectiveness of each promotion. Armed with this data, marketing personnel can refine future promotions in terms of both characteristics and scheduling, thus improving the accuracy of the forecasting process.

Promo Planning fulfils all these requirements. It is an integrated solution that favors teamwork. Rather than compelling you to work with structured data, it offers a highly configurable means of designing promotions, based on customizable attributes. The application enables users to manage promotions centrally, minimizing reliance upon Excel spreadsheets for data entry. Likewise, it avoids the intricacies generally associated with complex TPM applications.

Promo Planning:

- Provides clean data for the Service Optimizer 99+ (SO99+) model
- Uses ToolsGroup Machine Learning Engine (TGMLE) algorithms to predict the expected uplift for a given promotion (see Figure 1).

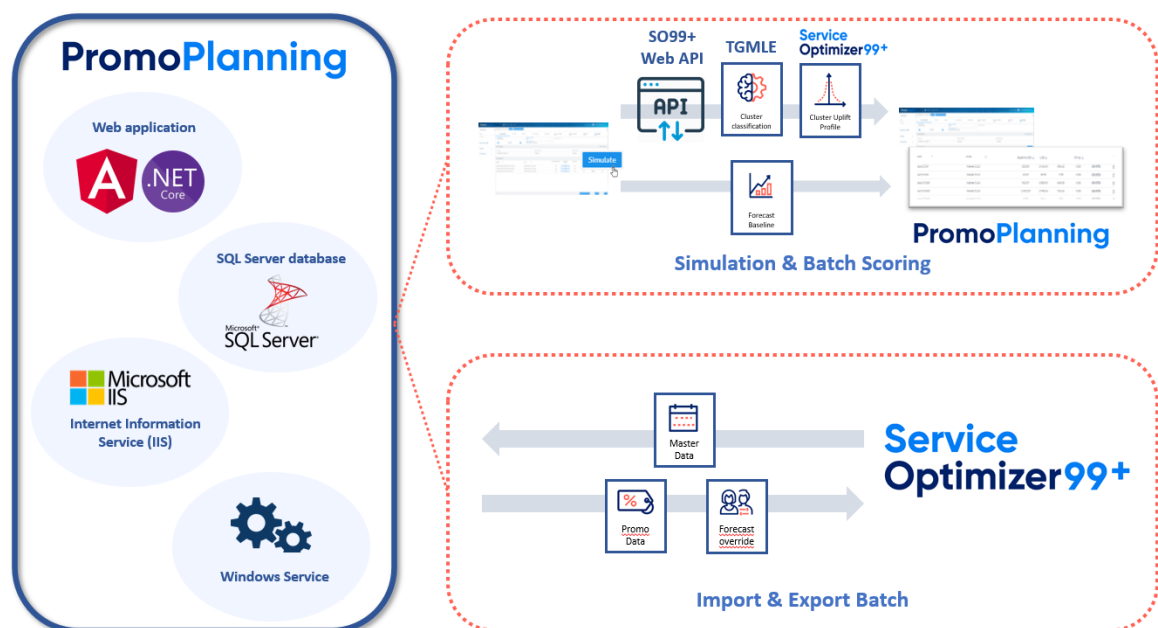


Figure 1: Promo Planning - SO99+ interface

The application boasts a user-friendly interface based on a dashboard that provides an overview of all promotional data elements.

1.2 Features

Promo Planning enables you to:

- Create and manage promotions speedily and efficiently.
- View live scoring of the uplift for individual event participants so as to assess the potential effect of a promotion. This simulation feature relies upon SO99+ forecasting algorithms and the TGMLE to ensure the accuracy of the promotion forecast.
- Establish the impact of past promotions at item/area and aggregate level.
- Edit the expected uplift in Promo Planning, overriding the SO99+ forecast (if desired).
- Avoid overstocks or stockouts resulting from inefficient promotion planning/scheduling.

The fundamental purpose of promotions forecasting is to estimate the effect of a promotion on past sales, using this data to remodel the forecast for a future horizon during which you are planning to launch a similar event (see Figure 2).

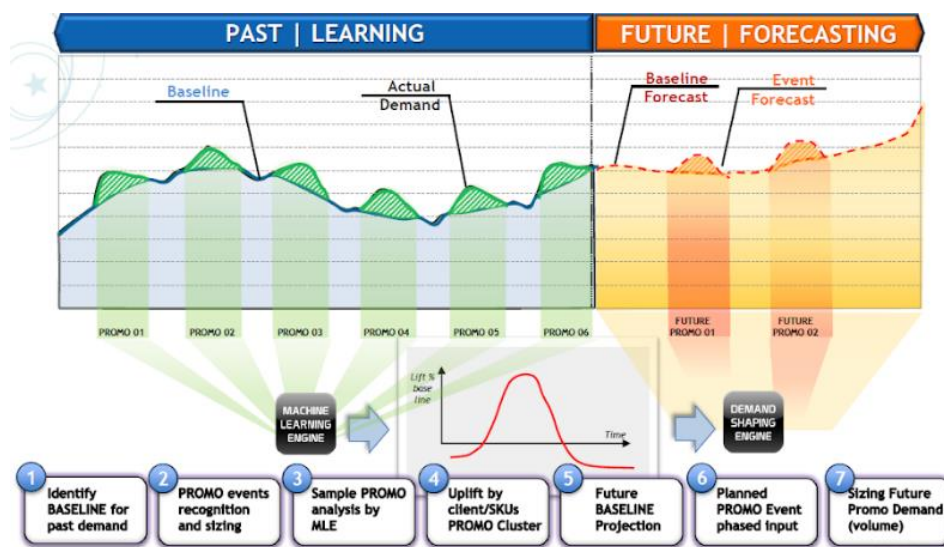


Figure 2: Promotions forecasting – general workflow

1.3 Logging in to the Application

To log in to Promo Planning, you must use access credentials granted by a user with administrator privileges. Once you have your username and password, enter them in the corresponding fields of the **Login** page (see Figure 3). You are free to [change your password later](#).

PromoPlanning

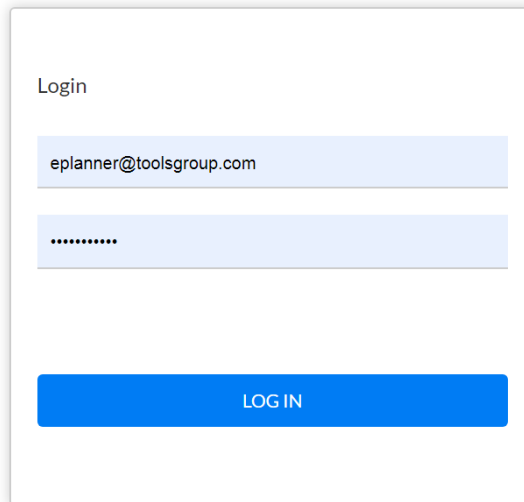
The image shows a login form for 'PromoPlanning'. At the top, the word 'Login' is displayed. Below it, there are two input fields: the first contains the email address 'eplanner@toolsgroup.com' and the second contains a masked password represented by eight dots. At the bottom of the form is a blue button with the text 'LOG IN' in white capital letters.

Figure 3: Login page

If the login operation is successful, Promo Planning redirects you to the home page (see Figure 4).

2 USER INTERFACE

2.1 Overview

Promo Planning boasts a friendly graphic user interface, designed to allow users to attain maximum benefit in the short term with a minimal workload. The highly intuitive nature of this interface owes much to various recurring features that are present throughout the application.

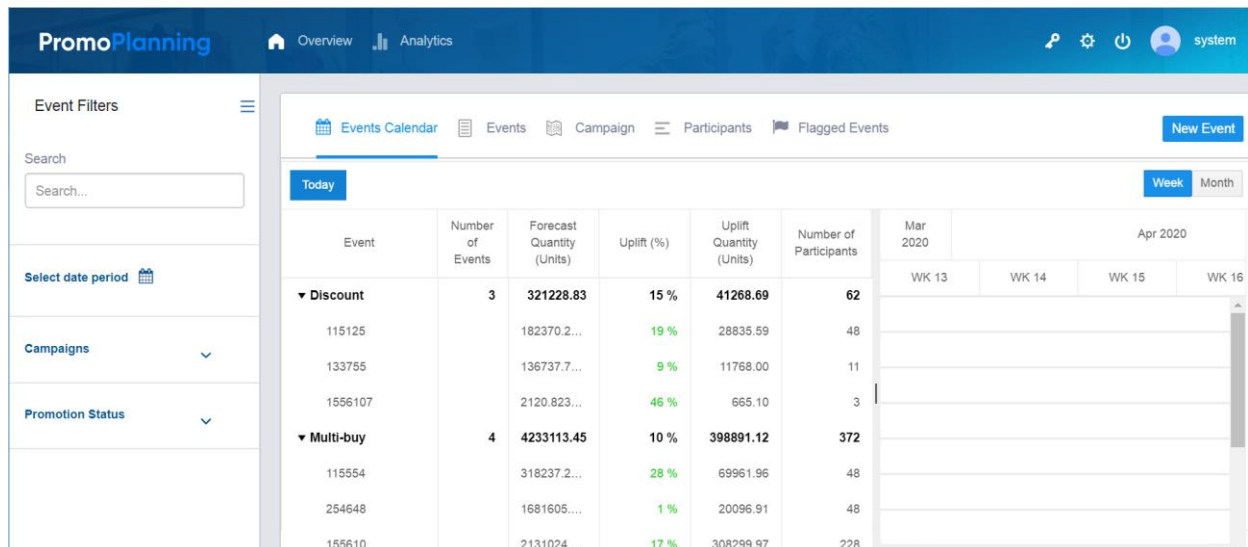


Figure 4: Promo Planning – home page (Overview – Events Calendar tab)

2.2 General Features

2.2.1 Icons

The Promo Planning user interface features the icons listed in Table 1.

| Icon | Name | Function |
|------|------------------------------|---|
| | Edit | Allows you to modify a Promo Planning event or campaign . |
| | Copy | Allows you to copy a Promo Planning event or participant . |
| | Delete | Allows you to delete a Promo Planning event , campaign or participant . |
| | View | Allows you to access a Promo Planning event in read-only mode. |
| | Lock | Allows you to unlock a Promo Planning event for editing. |
| | Flag | Indicates that an event satisfies a pre-defined flag rule . |
| | Upload file | Allows you to upload a CSV file containing product or attribute data. |
| | Show Code / Description | Toggles the display of the code/description when viewing products and/or areas. |
| | Add auto-update participants | Allows you to add selected item or area custom attributes to a Promo Planning event . |
| | Enlarge | Enlarges the Participants view , hiding the ribbon, header area and filter panel . |
| | Toggle | Hides/displays the filter panel on the left-hand side of the page. |

Table 1: Promo Planning user interface icons

2.2.2 Upper Toolstrip

The upper toolstrip, located immediately below the address bar, contains options for performing general/administrative operations.



Figure 5: Upper toolstrip

You can:

- Access the application's two functional areas (see Figure 5 [1]): **Overview** (the application proper) and **Analytics** (a generic reporting service, based on Power BI technology).
- Change the password that you use to [log in to the application](#) (see Figure 5 [2]). You must enter the old password and then type a valid new password. The system requires you to re-enter the new password for confirmation purposes.
- Invoke the application's **Settings** page (see Figure 5 [3]). This option is reserved for users with administrator privileges, and allows you to configure the following:
 - Import of master data from SO99+
 - [Event statuses](#) and [event types](#)
 - [Campaign attributes](#)
 - [Flags](#) – predefined conditions for flagging events/participants
 - Users and relative permission settings.

For further information, refer to the *Promo Planning Administrator Guide*.

- Log out of the application (see Figure 5 [4]).

2.2.3 Date Picker

The Promo Planning date picker (see Figure 6) lets you specify the period associated with a given event/campaign. To access the date picker, click the **Select date period** button in the filter panel to the left of the Promo Planning page. The date picker lets you choose from the following options:

- **Today** – Promo Planning schedules the event/campaign to start and end on the current date
- **Tomorrow** – Promo Planning schedules the event/campaign to start and end on the day following the current date
- **Next 7 days** – Promo Planning schedules the event/campaign to start on the current date and end exactly six days later
- **Next 30 days** – Promo Planning schedules the event/campaign to start on the current date and end exactly 29 days later
- **Next month** – Promo Planning schedules the event/campaign to start on the first day of the month following the current month and end on the last day of the same month
- **Custom range** [default] – Promo Planning allows you to select manually the start date and the end date of the event/campaign. You can use the < and > buttons to display earlier/later months.

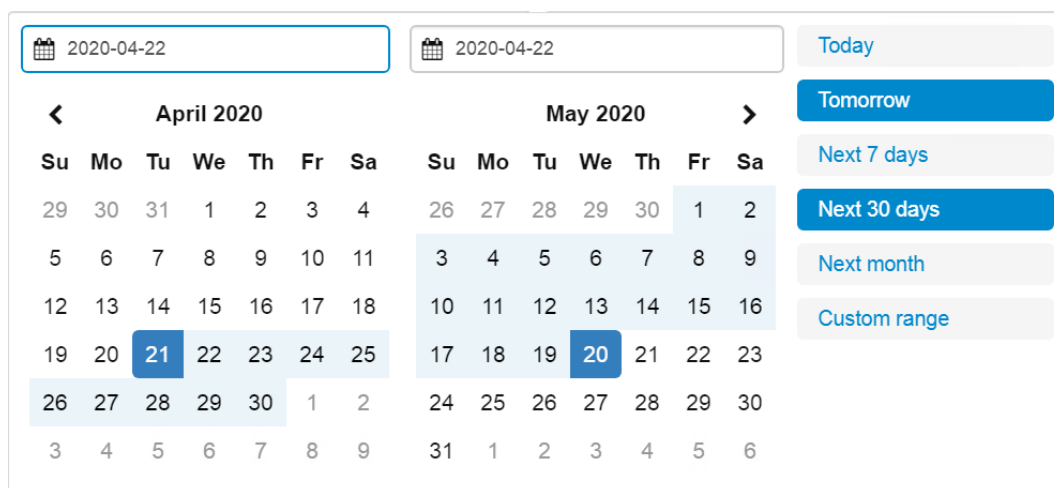


Figure 6: Date picker

2.2.4 Filters

Promo Planning lets you manage a vast number of promotions. In view of this consideration, the application makes extensive use of filtering mechanisms, allowing you to address only events and campaigns that satisfy specific characteristics.

The filter panel is always located to the left of the Promo Planning page. The elements present in the panel may vary depending on the page selected:

- **Search**

The search engine searches the name/description of all campaigns, events and participants on the database. As you type the desired string in the text box, the search engine updates the page to include only those codes/descriptions that correspond to the sequence of characters. Promo Planning displays a button below the **Search** text box (see Figure 7 [1]), indicating the current filter definition.

Click the **Clear** button (see Figure 7 [2]) to clear the contents of the text box.

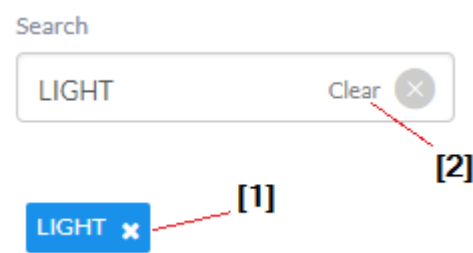


Figure 7: Search engine

- Checkbox filters
 Promo Planning also allows you to filter by:
 - Campaign (see Figure 8 [1]) – select the checkbox(es) corresponding to the campaign(s) that you wish to view (**Select all** displays all campaigns)
 - Promotion status (see Figure 8 [2]) – select the checkbox(es) corresponding to the [status\(es\)](#) that you wish to view (**Select all** displays all promotions, irrespective of status).

The screenshot displays the filter section of the Promo Planning interface. At the top, there are two blue buttons: 'PATTERNED KNITS' and 'Planned', each with a small 'x' icon to its right. A red line connects the 'x' on 'Planned' to a bracketed number '[3]' on the right. Below these buttons is a horizontal date range slider with 'Sep 3, 2016' on the left and 'Feb 17, 2019' on the right. Under the slider, there is a section titled 'Campaigns' with a red line connecting it to a bracketed number '[1]' and an upward arrow. Below this title are three checkboxes: 'Select All' (unchecked), 'PATTERNED KNITS' (checked), and 'QUALITY CROCHET' (unchecked). Below the 'Campaigns' section is another section titled 'Promotion Status' with a red line connecting it to a bracketed number '[2]' and an upward arrow. Below this title are three checkboxes: 'Select All' (unchecked), 'Approved' (unchecked), and 'Planned' (checked).

Figure 8: Checkbox filters

In both cases, Promo Planning displays buttons below the **Search** text box (see Figure 8 [3]), indicating the current filter definition. Promo Planning filters remain active until you remove them. To remove a filter, click the **X** in the appropriate button below the **Search** text box.

3 EVENTS CALENDAR

3.1 Overview

Events are synonymous with promotions. Promo Planning provides a simple graphic user interface in the shape of a calendar that supports viewing and creation of promotions with a minimum of user intervention. The **Events Calendar** tab is the first tab in the Promo Planning ribbon (see Figure 9).



Figure 9: Promo Planning ribbon – Events Calendar

3.2 Using the Events Calendar Tab

The **Events Calendar** tab supports a number of different Promo Planning activities. You can:

- Select the time frame for displaying events. The **Events Calendar** supports weekly and monthly time frames (see Figure 10).



Figure 10: Time frame

- Control the number of events displayed by defining [checkbox filters](#).
- Resize the columns on the left-hand side of the page by dragging the slider that separates the column section from the calendar.
- View summary details concerning the uplift for a given event by clicking the event in the calendar section (Promo Planning highlights the selected event in blue) and hovering the cursor over it to display a tooltip.
- Double click an event in the calendar section to [invoke the relative Events tab in view mode](#).
- Display all the events associated with a specific event type by clicking the relative drop-down.
- Create a new event by clicking the **New Event** button. For a detailed description of the relative procedure, refer to [Creating an Event](#).

The color code used by Promo Planning to highlight events in the calendar is based on the promotion uplift.

4 EVENTS



4.1 Overview

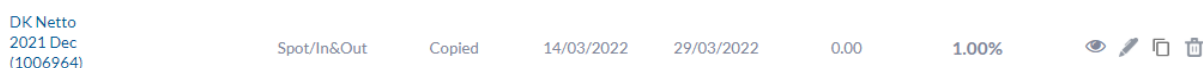
Promo Planning provides a simple graphic user interface that supports the viewing, creating and editing of promotions with minimal effort. The **Events** tab is the second tab in the Promo Planning ribbon (see Figure 11).



Figure 11: Promo Planning ribbon – Events

The tab lists each event with a summary of its main details (see Figure 12). There are two different modes for accessing events:

- View mode – Promo Planning lets you view details of the event, but it is not possible to modify the event in any way. To invoke view mode, click the  icon for the event. Once inside the event, you can click the **Switch to edit mode** button to perform editing tasks.
- Edit mode – you can modify the elements associated the event. To invoke edit mode, click either the  icon or the name of the desired event. Once inside the event, you can click the **Switch to view mode** button to view the various details.









| | | | | | | | |
|-----------------------------------|-------------|--------|------------|------------|------|-------|---|
| DK Netto 2021 Dec (1006964) | Spot/In&Out | Copied | 14/03/2022 | 29/03/2022 | 0.00 | 1.00% |     |
|-----------------------------------|-------------|--------|------------|------------|------|-------|---|

Figure 12: Events tab

4.1.1 Locking

If another user is editing a given event, Promo Planning displays a  icon and prevents you from accessing the event. By hovering over the icon, you can view the identity of the user and the time at which the editing session began. It is also possible to release the lock by clicking the  icon (Promo Planning displays a pop-up message, requesting confirmation of the operation), provided that you have the necessary permissions. Only users with administrator privileges can define permissions (via the [Settings page](#)); for further information, refer to the *Promo Planning Administrator Guide*.

4.1.2 Event Status

Statuses are phases in the evolution of an event (e.g. Planned, Confirmed, Cancelled...) that allow you to plan the workflow associated with the promotion management process. Only users with administrator privileges can define event statuses (via the [Settings page](#)); for further information, refer to the *Promo Planning Administrator Guide*.

4.1.3 Event Type

The key feature of any promotion is the event type. Promo Planning offers ample scope for customizing promotions by event type (discount, coupon, point-of-sale display, etc.). Each event type requires you to specify associated attributes in order to define the promotion. For example, if the case of an event type such as **Discount**, the secondary attributes might be:

- **Discount type** [Up to / Flat]
- **Discount** [Amount]
- **Free gift** [Description]

4.2 Creating an Event

To create an event, follow these steps:

1. Select the **Events** tab in the ribbon. Promo Planning displays a grid containing details of all the existing events.
2. Click **New Event**. Promo Planning displays the **Event Details** view.
3. Enter data in the following fields:
 - **Event Name** [mandatory] – enter a name to identify the promotion (see Figure 13 [1]).
 - **Status** – select the initial [status](#) associated with the event.
 - **Select a campaign** [optional] – assign the event to a campaign by selecting the name of the relative campaign in the list box (see Figure 13 [2]). Alternatively, it is possible to create a brand new campaign; enter the name directly in the text box and click **Add new**. You can add [the additional campaign parameters later](#).

Figure 13: Creating an event (1)

- **Event Description** [optional] – enter a description for the promotion (see Figure 13 [3]).
- **Select date period** – use the [date picker](#) to select the period for which the event is to run (see Figure 13 [4]).

Note: If the event is assigned to a campaign, this field defaults to the period associated with the campaign in question. However, you can still use the [date picker](#) to select a different period.

4. Click the **+ Attributes** button to open the **Event Attributes** panel.
5. Choose one of the attributes in the **Event Type** combo box. Event attributes conform to a 2-level hierarchy, and are customizable. For example, the **Event Type** choices might be **Discount**, **Threshold** and **Staggered**; depending on the option selected, Promo Planning displays various customized attribute fields.

To remove the **Event Type** assignment and any related event attributes, click **Remove attributes**.

6. Select values for the event attributes displayed (based on the **Event Type** selection).
7. Select the [Products view](#) to identify the products for inclusion in the promotion.
8. Select the [Markets view](#) to identify the areas for inclusion in the promotion.
9. Select the [Participants view](#) to define the participant-specific attributes.
10. Click **Save New** to save the new event to the database.

4.2.1 Products


The **Products** view allows you to select the products that you wish to associate with the event. The selections made here and in the [Markets view](#) determine the combinations available in the [Participants view](#).

A grid on the right-hand side of the page lists all product codes/descriptions. To choose a product, select the relative checkbox. The checkbox in the header row lets you choose all products. Promo Planning displays product selections in the **Participants** panel at the bottom of the page.

The panel on the left-hand side of the page lets you filter the product population:

Search

The search engine searches the code/description of all the products on the database. As you type the desired string in the text box, the search engine updates the list of products to include only those codes/descriptions that correspond to the sequence of characters.

Click the  button to select and upload a predefined CSV file containing product codes/descriptions.


Click the  button to clear the contents of the text box.

Select attributes

The **Products** view contains a **Select attributes** combo box for each *item* custom attribute imported from SO99+. To filter the product population by a specific custom attribute, select the desired attribute in the combo box.



Figure 14: Creating an event (2)

In addition, you can click the  button (see Figure 14 [1]) to create an auto-update rule for the event; Promo Planning automatically adds any products that match the selected attribute value. The application displays a button below the combo box (see Figure 14 [2]), indicating the current attribute selection. Note the following restrictions:

- It is only possible to add active datagroups (i.e. existing item/area combinations) as participants
- Promo Planning only adds products for existing event markets.

Click the  button to clear the contents of the text box.

The **Product** label at the top of the panel indicates the total number of elements; Promo Planning updates this number each time you apply a filter. The **Select all** checkbox offers an alternative means of selecting all the products in the grid; if you have already selected one or more areas in the [Markets view](#), Promo Planning summarizes the product selection as “All” when displaying the combinations in the **Participants** panel.

4.2.2 Markets

The **Markets** view allows you to select the areas that you wish to associate with the event. The selections made here and in the [Products view](#) determine the combinations available in the [Participants view](#).

A grid on the right-hand side of the page lists all area codes/descriptions. To choose an area, select the relative checkbox. The checkbox in the header row lets you choose all areas. Promo Planning displays area selections in the **Participants** panel at the bottom of the page.

The panel on the left-hand side of the page lets you filter the area population:


Search

The search engine searches the code/description of all the areas on the database. As you type the desired string in the text box, the search engine updates the list of areas to include only those codes/descriptions that correspond to the sequence of characters.

Click the **Clear**  button to clear the contents of the text box.

Select attributes

The **Markets** view contains a **Select attributes** combo box for each *area* custom attribute imported from SO99+. To filter the product population by a specific custom attribute, select the desired attribute in the combo box.

In addition, you can click the  button to create an auto-update rule for the event; Promo Planning automatically adds any markets that match the selected attribute value. The application displays a button below the combo box, indicating the current attribute selection. Note the following restrictions:


- It is only possible to add active datagroups (i.e. existing item/area combinations) as participants
- Promo Planning only adds new markets for existing event products.

Click the **Clear**  button to clear the contents of the text box.

The **Market** label at the top of the panel indicates the total number of elements; Promo Planning updates this number each time you apply a filter. The **Select all** checkbox offers an alternative means of selecting all the areas in the grid; if you have already selected one or more products in the [Products view](#), Promo Planning summarizes the area selection as “All” when displaying the combinations in the **Participants** panel.

4.2.3 Participants

The **Participants** view allows you to assign additional participant-specific attributes to an event. You can do this in two different ways:

- Click the  button to select and upload a predefined CSV file containing product attributes
- Enter the values manually by participant. This requires you to select the participant attributes to be displayed in the grid from the **Attributes** combo box.



The **Event Type** combo box provides a further opportunity to select the [event type](#) for association with the event.

Note: If the **Event Type** is modified, all the event attribute values entered in the **Event** tab will be lost.

The grid lists all the participants (product/area combinations) associated with the selected event. The **Product** and **Area** search engines located above the grid let you filter the contents of each column. Type the desired string in the text box; the search engine updates the grid to include only those codes/descriptions that correspond to the sequence of characters.



4.3 Viewing an Event

To view an event:

1. Select the **Events** tab in the ribbon. Promo Planning displays a grid containing details of all the existing events.
2. Click either the  icon at the end of the row corresponding to the event that you wish to view. Promo Planning displays the selected event in the **Event Details** view. It is possible to:
 - Modify any of the [general event parameters](#) (in [edit mode](#) only)
 - Change the selections in the [Products](#) and [Markets views](#) (in [edit mode](#) only)
 - Remove a product/area combination listed in the **Participants** panel – click the  icon at the end of the row corresponding to the participant in question, then click **No** to confirm the deletion.
3. Click **Save** to save any changes to the database.


4.4 Editing an Event

To edit an existing event, follow these steps:

1. Select the **Events** tab in the ribbon. Promo Planning displays a grid containing details of all the existing events.
2. Click either the event name or the  icon at the end of the row corresponding to the event that you wish to modify. Promo Planning displays the selected event in the **Event Details** view. It is possible to:
 - Modify any of the [general event parameters](#) (name, description, associated campaign, date period)
 - Change the selections in the [Products](#) and [Markets views](#)
 - Remove a product/area combination listed in the **Participants** panel – click the  icon at the end of the row corresponding to the participant in question, then click **Save** to confirm the deletion.
3. Click **Save** to save any changes to the database.

4.5 Copying an Event


To copy an existing event, follow these steps:

1. Select the **Events** tab in the ribbon. Promo Planning displays a grid containing details of all the existing events.
2. Click the  icon at the end of the row corresponding to the event that you wish to copy. Promo Planning displays the selected event in the **Event Details** view, adding the suffix **[1]** to the event name. It is possible to modify this name subsequently.

You can now [edit the parameters and attributes](#) of the newly-created event as desired.

4.6 Deleting an Event

To delete an event, follow these steps:

1. Select the **Events** tab in the ribbon. Promo Planning displays a grid containing details of all the existing events.
2. Click the  icon at the end of the row corresponding to the event that you wish to delete. Promo Planning displays a pop-up message, requesting confirmation of the delete operation.
3. Click **Yes** to complete the deletion. Alternatively, click **No** to abort the operation.

4.7 Exporting an Event

To export an event, click the **Export** button in the bottom right-hand corner of the **Event Details** view. The application generates a .csv file in the Downloads folder of your browser, containing all details of the event defined in the configuration.

4.8 Simulating an Event

Simulation of a future event implies predicting its behavior in terms of expected sales, even if there is no precedent to use as a guideline. Promo Planning lets you calculate the expected uplift for the promotion, based on its characteristics (date, attributes, associated product/market combinations, etc.). You can simulate a Promo Planning event provided that:

- The event is in the future
- You have defined the necessary event attributes
- You access the event in edit mode.

If the event does not satisfy the above conditions, the **Simulate** button remains disabled.

To simulate an event, follow these steps:

1. Select the **Events** tab in the ribbon. Promo Planning displays a grid containing details of all the existing events.
2. Click the name of the event that you wish to simulate. Promo Planning displays the selected event in the **Event Details** view.
3. Click the **Simulate** button in the **Participants** panel.

In order to perform the simulation for the event in question, the Promo Planning Livescore service retrieves the following data elements (see Figure 15):

- Statistical forecast baseline (from SO99+)
- Output from the classification process executed by the TGMLE (the cluster in which SO99+ classified the promotion)
- Cluster uplift profile.

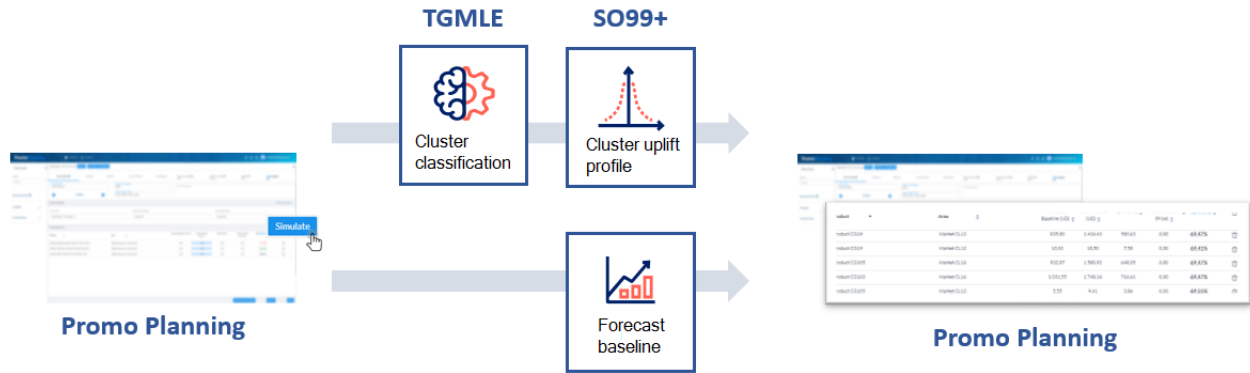


Figure 15: Event simulation – data elements

Following simulation, Promo Planning displays the following data (for each participant):

- Forecast baseline (in units): expected demand for the product/market/period combination (without any promotion)
- Uplift (in units): expected uplift in sales for the specific product/market/period combination (as a result of the promotion)
- Total forecast (in units): total expected demand for the product/market/period combination (as a result of the promotion)
- Uplift (%): percentage uplift in sales with respect to the baseline (as a result of the promotion).

5 CAMPAIGN

5.1 Overview

A campaign is an optional Promo Planning element that serves as a “container” for promotions, facilitating the classification and organization of large numbers of events. In short, filtering by campaign simplifies the task of tracking and retrieving individual events. The **Campaign** tab is the third tab in the Promo Planning ribbon (see Figure 16).



Figure 16: Promo Planning ribbon – Campaign

5.2 Viewing a Campaign

To view the attributes of existing campaigns, select the **Campaign** tab in the ribbon. Promo Planning displays a grid containing details of all campaigns. By clicking the arrows in the header at the top of any column, it is possible to sort the entries in either ascending (▲) or descending (▼) order.

You can:

- Use the [date picker](#) in the filter panel to restrict the period for which the grid displays campaigns
- [Edit a campaign](#) by clicking the name of the desired campaign.

5.3 Creating a Campaign

To create a campaign, follow these steps:

1. Select the **Campaign** tab in the ribbon. Promo Planning displays a grid containing details of all the existing campaigns.
2. Click **New Campaign**. Promo Planning displays the **Campaign Details** view.
3. Enter data in the following fields:
 - **Campaign Name** [mandatory] – enter a name to identify the campaign (see Figure 17 [1])

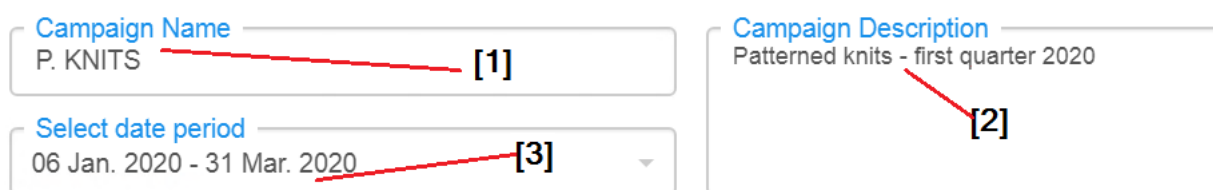



Figure 17: Creating a campaign

- **Campaign Description** [optional] – enter a description for the campaign (see Figure 17 [2])
 - **Select date period** – use the [date picker](#) to select the period for which the campaign is to run (see Figure 17 [3]).
4. Click the + **Attributes** button to open the **Campaign Attributes** panel.
 5. Choose one of the attributes in the **Campaign Type** combo box. Campaign attributes are customizable, e.g. **Summer** or **Winter**.
 6. Click **Save New** to save the new campaign to the database.

Note: The **Campaign Events** panel remains empty and the **New Event** button remains disabled, given that it is not possible to define a new event while creating a campaign.



5.4 Modifying a Campaign

To modify the attributes of an existing Promo Planning campaign, follow these steps:

1. Select the **Campaign** tab in the ribbon. Promo Planning displays a grid containing details of all the existing campaigns.
2. Click either the campaign name or the  icon at the end of the row corresponding to the campaign that you wish to modify. Promo Planning displays the selected campaign in the **Campaign Details** view.


Campaign Attributes: click **+ Attributes** to open the panel. Campaign attributes are customizable; for further information, refer to [Creating a Campaign](#). To remove any campaign attribute assignments, click **Remove attributes**.

Campaign Events: This panel displays any events associated with the campaign:

- [To view an event](#), click the  icon at the end of the row
 - [To edit an event](#), click the  icon at the end of the row
 - To create a new event directly, click the **New Event** button and follow the [relative procedure](#).
3. Click **Save New** to save the new campaign data to the database.

5.5 Deleting a Campaign

To delete a Promo Planning campaign, follow these steps:

1. Select the **Campaign** tab in the ribbon. Promo Planning displays a grid containing details of all the existing campaigns.
2. Click the  icon at the end of the row corresponding to the campaign that you wish to delete. Promo Planning displays a pop-up message, enquiring whether you also wish to delete any component events (in addition to deleting the campaign itself).
3. Click **Yes** to delete the campaign together with its component events, or click **No** to delete the campaign only. Alternatively, click **Cancel** to abort the operation.

6 PARTICIPANTS

6.1 Overview

The **Participants** tab offers a grid view of the participants (product/area combinations) associated with the event(s) selected in the **Events** tab. If you display the events pertaining to all campaigns in the **Events** tab, the grid displays all the participants on the database. To facilitate location of specific records in the list, you can:

- Use the [search engine](#) to locate the codes/descriptions of specific products and areas
- Filter the display by [campaign or promotion status](#).




The **Participants** tab is the fourth tab in the Promo Planning ribbon (see Figure 18).



Figure 18: Promo Planning ribbon – Participants

6.2 Using the Participants Tab

The **Participants** tab provides a general summary of the products or areas that are most successful with regard to past productions. You can:

- [Edit an event](#) – click the  icon at the end of the row corresponding to the desired product/area combination. Promo Planning displays the associated event in the **Event Details** view.
- [Copy an event](#) – click the  icon at the end of the row corresponding to the desired product/area combination. Promo Planning displays the associated event in the **Event Details** view, adding the suffix **[1]** to the event name. It is possible to modify this name subsequently.
- Remove a product/area combination associated with an event – click the  icon at the end of the row corresponding to the desired product/area combination. Promo Planning displays a pop-up message, requesting confirmation of the delete operation.

7 FLAGGED EVENTS

7.1 Overview

The **Flagged Events** tab offers a grid view of events that satisfy a pre-defined rule or condition. For example, you might wish to flag all events that have more than 10 participants or that expire within a specific date. You can also use different colors to denote different levels of severity. Only users with administrator privileges can define flags (via the [Settings page](#)); for further information, refer to the *Promo Planning Administrator Guide*. The **Flagged Events** tab is the fifth tab in the Promo Planning ribbon (see Figure 19).

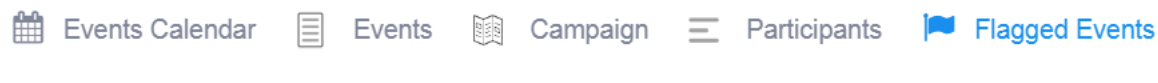



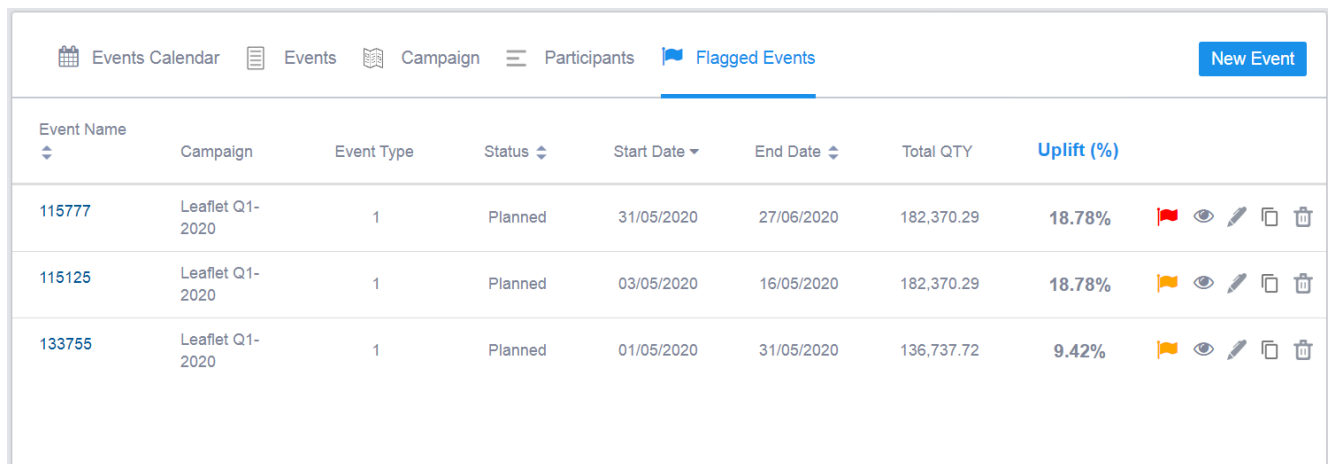
Figure 19: Promo Planning ribbon – Flagged Events

7.2 Using the Flagged Events Tab

The **Flagged Events** tab provides a general summary of events flagged by Promo Planning in accordance with the pre-defined rules. You can:

- View event flag information – click the  icon at the end of the row (see Figure 20). Promo Planning displays a message with the relevant flag information.

Note: If a given event satisfies more than one rule, Promo Planning only displays the primary flag (i.e. the flag corresponding to the highest level of severity) in the summary list of events. For details of all the flags associated with a specific event, you must access the event itself.









| Event Name | Campaign | Event Type | Status | Start Date | End Date | Total QTY | Uplift (%) | |
|------------|-----------------|------------|---------|------------|------------|------------|------------|---|
| 115777 | Leaflet Q1-2020 | 1 | Planned | 31/05/2020 | 27/06/2020 | 182,370.29 | 18.78% |  |
| 115125 | Leaflet Q1-2020 | 1 | Planned | 03/05/2020 | 16/05/2020 | 182,370.29 | 18.78% |  |
| 133755 | Leaflet Q1-2020 | 1 | Planned | 01/05/2020 | 31/05/2020 | 136,737.72 | 9.42% |  |

Figure 20: Flagged Events tab

- [Edit an event](#) – click the  icon at the end of the row corresponding to the desired event. Promo Planning displays the associated event in the **Event Details** view.
- [Copy an event](#) – click the  icon at the end of the row corresponding to the desired event. Promo Planning displays the associated event in the **Event Details** view, adding the suffix **[1]** to the event name. It is possible to modify this name subsequently.
- Remove a product/area combination associated with an event – click the  icon at the

FLAGGED EVENTS - Using the Flagged Events Tab

end of the row corresponding to the desired event. Promo Planning displays a pop-up message, requesting confirmation of the delete operation.