![z·visuel]

PlanogramBuilder User Guide

Rev. 46 - June 2022

What's new in this release: https://planogrambuilder.com/newsletters/2022-06/2022-06-PlanogramBuilder-newsletter.html

Table of Contents

Learning resources

The following material will help you learn and use PlanogramBuilder.

List of Learning Material

User guide

This user guide is your main reference material for learning how to use PlanogramBuilder. It is accessible by clicking on the **Help** button in PlanogramBuilder.

Its sections are organized in a way that should match the chronological learning process. We therefore advise you to browse it in the order the chapters are presented.

It also contains many step-by-step instructions with illustrations and screen captures to show you how to perform typical tasks.

The user guide does include topics on all features available in the application so it is our most complete source of information.

If you have trouble finding a topic in the tree menu on the left pane (**Contents**), you can also search Topics in a listing (**Topics**) or by text search (**Search**).

Each section can also be printed out individually should you want to keep a paper reference for more complex features. Use the link labeled **Print current topic** on the upper right corner of this page.

A *PDF* version with the exact same content is also available from the link in the top right corner of this page: **User guide in PDF format**.

Tutorials

This user guide includes a few tutorials with sample files when necessary for the more complex tasks. You will come across them when you consult one of these advanced topics.

There are also **video tutorials** on PlanogramBuilder YouTube channel: https://www.youtube.com/user/zVisuel. These video tutorials can also be opened directly from within the application by clicking on the **Tutorials** button.

Tooltips

Many tools and command names in PlanogramBuilder are quite self-explanatory. Additionally hovering your mouse over any button displays a tooltip with a quick textual description.

FAQ

Some often asked general questions are listed in our FAQ: https://planogrambuilder.com/faq.html

User assistance

If you are stuck with using some feature or have a question, we will gladly assist you. Please see the dedicated section of this user guide: Assistance.

PlanogramBuilder Introduction

PlanogramBuilder is an application to create planograms in 3D. Planograms help you plan, optimize and communicate the placement of your products in retail stores.

PlanogramBuilder is a web-based application running on Windows PCs. Your company can have any number of users accessing PlanogramBuilder from anywhere with a web-capable PC.

This system is very flexible as it can suit small companies with a single person doing planograms or very large companies with 500 persons doing planograms across the world.

The PlanogramBuilder solution is designed for an easy and seamless deployment with a ready-to-use centralized database that can carry all your product line. This means that all of your users will have access to the same set of products.

The database is hosted on our servers, so you don't need any database knowledge to use PlanogramBuilder.

Typically, one or a few designated power user(s) in your company (*PlanogramBuilder Administrator*) manage(s) the product database. The other users (*Standard Users*) are able to create, edit and publish planograms. See all the difference between user roles in Choosing User Roles.

When a *PlanogramBuilder Administrator* adds a product to your PlanogramBuilder database, this product instantly becomes available to each user of your company for planogramming.
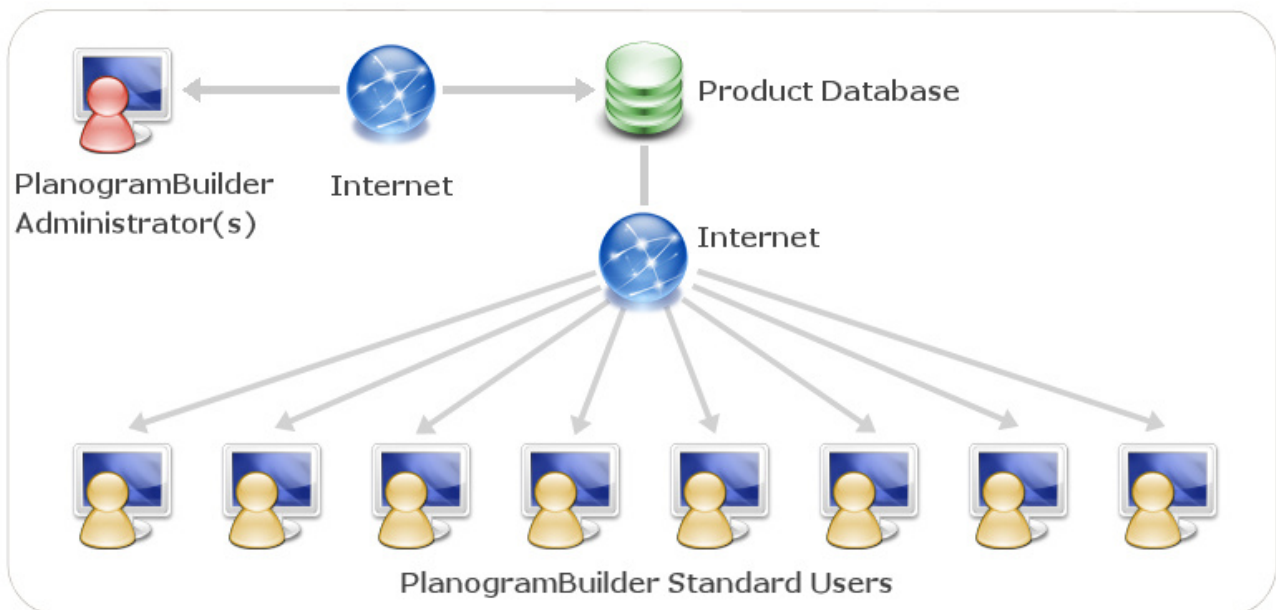
Schematic representation of the PlanogramBuilder solution

PlanogramBuilder includes many features to let you create beautiful planograms quickly, to analyze potential returns and to export reports and images of your planograms. The summary list of features is available on our web site at https://planogrambuilder.com, and a video tour at https://planogrambuilder.com/planogrambuilder-video-presentation.html.

In this user guide, we will explain in detail all features and tools available in the application. You will also find many tips and shortcuts to be more efficient with PlanogramBuilder.

Installation and Startup

This section explains how to install, launch and set main parameters of PlanogramBuilder.

System Requirements

Microsoft Windows

Operating System:	Microsoft ® Windows™ Vista, 7, 8, 8.1, 10, 11 64-bit Windows™ version required
CPU:	Intel or AMD 64-bit processor (CPU) (recent multi-core CPU advised for best performance)
Display	1280 x 720 resolution and above (1920 x 1080 or higher advised)

Mac OS × or other operating systems

You can run PlanogramBuilder on a **Mac**, **Linux** or **Solaris** computer by installing Windows™ XP, Vista or 7 on these systems. If you already have access to Windows from your Apple, Linux or Solaris computer, you can directly install and run PlanogramBuilder.

If you don't have Windows on your computer, our recommended solution is to install Windows and PlanogramBuilder inside your OS environment so you can run PlanogramBuilder directly from your preferred OS. There are several software solutions to achieve this:

- *Oracle VirtualBox* (https://www.virtualbox.org/): for Mac OS X, Linux and Solaris. Free license.
- *VMware Player* (https://www.vmware.com/products/player/): for Linux. Free license.
- *VMware Fusion* (https://www.vmware.com/products/fusion/): for Mac OS X.
- *Parallels Desktop* (https://www.parallels.com/products/desktop/): for Mac OS X.

Another solution to run PlanogramBuilder on a non-Windows computer is to install Windows as an alternative OS with dual-boot. This method will however require you to restart your computer every time you want to switch between your OS and Windows/PlanogramBuilder. For a Mac, please see instructions at https://www.apple.com/support/bootcamp/.

Note: the system requirements are the same as listed for Microsoft Windows.

Install PlanogramBuilder

Check what's new in the latest release at https://planogrambuilder.com/newsletters/2022-06/2022-06-PlanogramBuilder-newsletter.html.

To install PlanogramBuilder latest version, choose one of the installation methods:

- Normal installation: This is the suggested and standard method for most users.
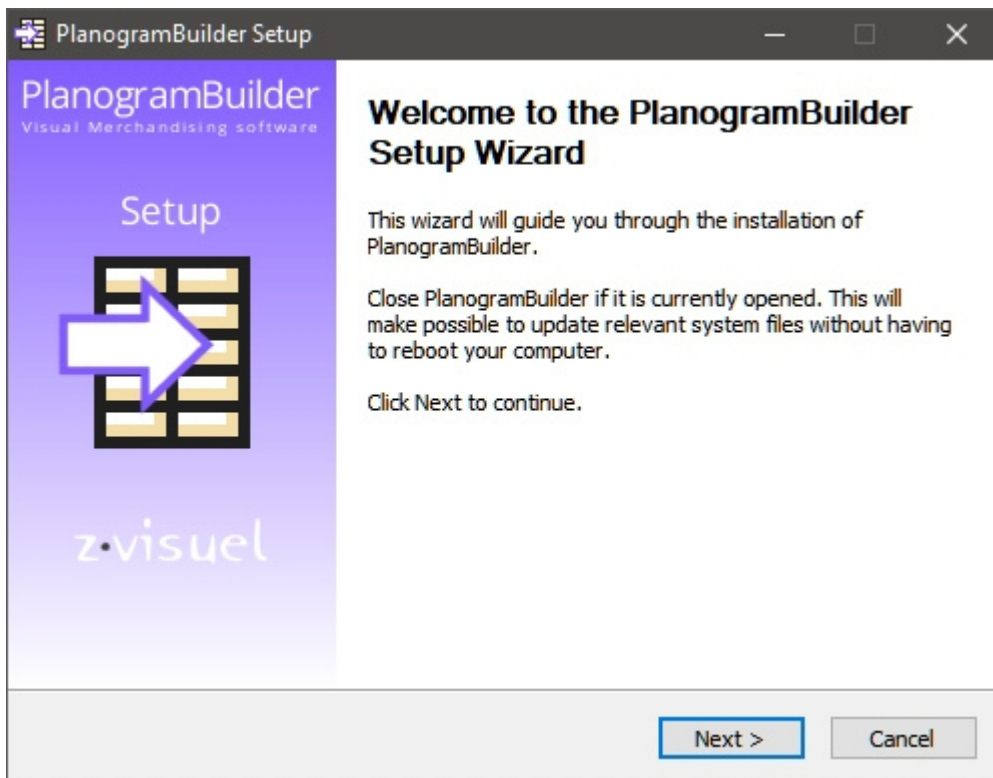- Unattended installation: This method can be used by IT staff to install PlanogramBuilder remotely.

Normal installation

Video tutorial on this topic: 1: Installing PlanogramBuilder

1. **Close PlanogramBuilder** if you already have a version opened. If you are updating PlanogramBuilder, you don't need to uninstall the old version: simply follow the next steps; you will also retain all your data.

2. **Download the installer**: click on the following link or paste the link in your web browser address field:
   https://planogrambuilder.zvisuel.com/downloads/PlanogramBuilderSetup.exe

3. **Run the installer** after it has been downloaded.

Note: the installer requires Administrator privileges, so if you are prompted to enter an administrator password, please ask your IT.
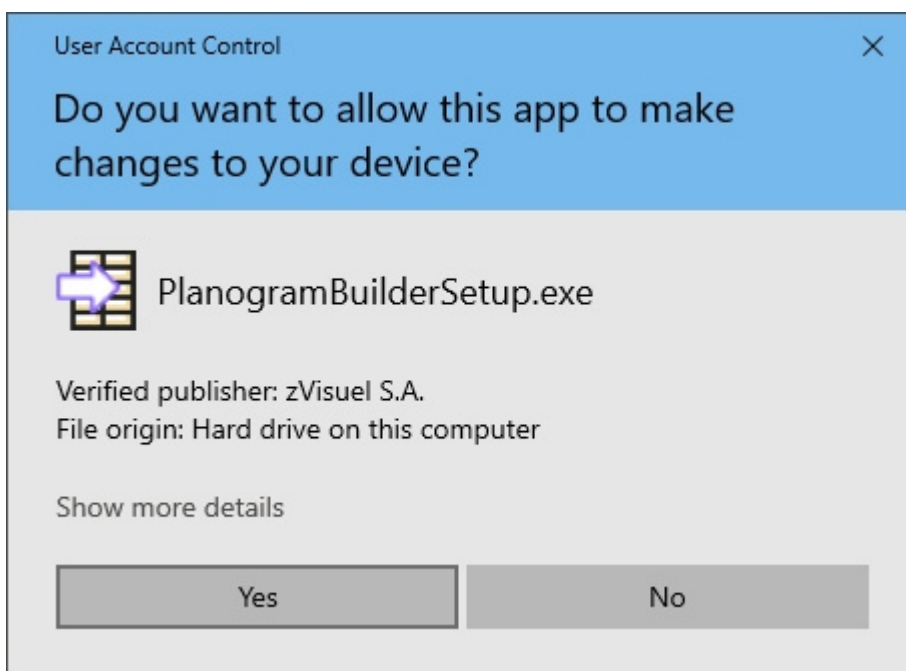
4. Follow the on-screen instructions until installation has completed.

Unattended installation

This installation method is convenient for IT managers who must install PlanogramBuilder onto remote computers.

1. **Close PlanogramBuilder** if you already have a version opened. If you are updating PlanogramBuilder, you don't need to uninstall the old version: simply follow the next steps; you will also retain all your data.

2. **Download the installer and save it to your hard drive**: click on the following link or paste the link in your web browser address field:
   https://planogrambuilder.zvisuel.com/downloads/PlanogramBuilderSetup.exe

3. **Run the installer** with the **/S** (case sensitive) argument. A typical call from your installation package/batch will be: *PlanogramBuilderSetup.exe /S*

4. Optionally, use the **AccountID** command line parameter for the installer. This lets you enter your account ID at installation, so the users won't need to enter the account ID when they run PlanogramBuilder.

Example: *PlanogramBuilderSetup.exe /AccountID=goodcompany_ihrpz437 /S*

Note: The AccountID parameter name is case insensitive

Note: if the target session has no administrator rights, the main installer will have to escalate the privilege to admin before this call to avoid the dialog asking for admin credentials.

Update PlanogramBuilder

PlanogramBuilder is updated on a regular basis to bring improvements. Check what's new in the latest release at https://planogrambuilder.com/newsletters/2022-06/2022-06-PlanogramBuilder-newsletter.html.
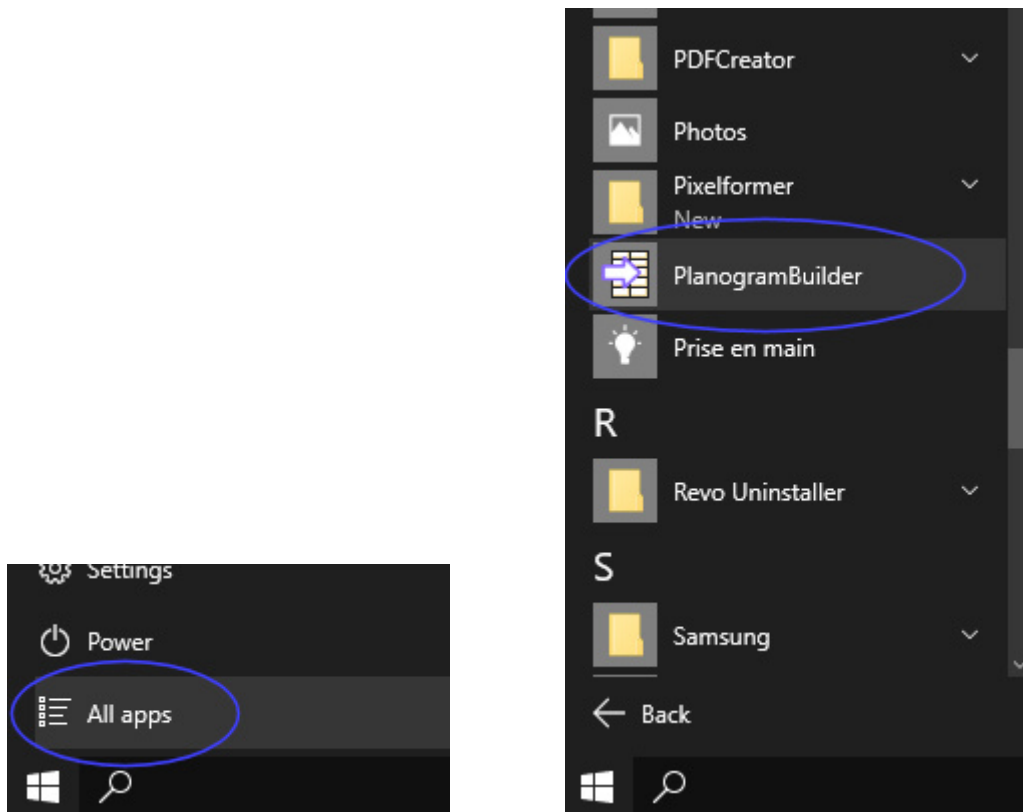
You will be notified on screen at each required update and guided to perform the installation.
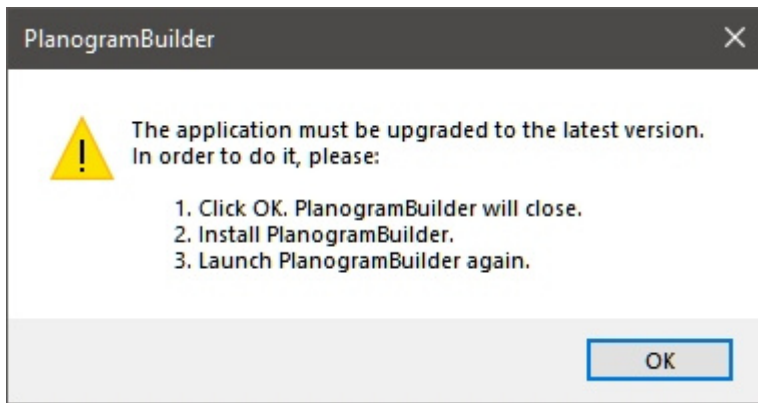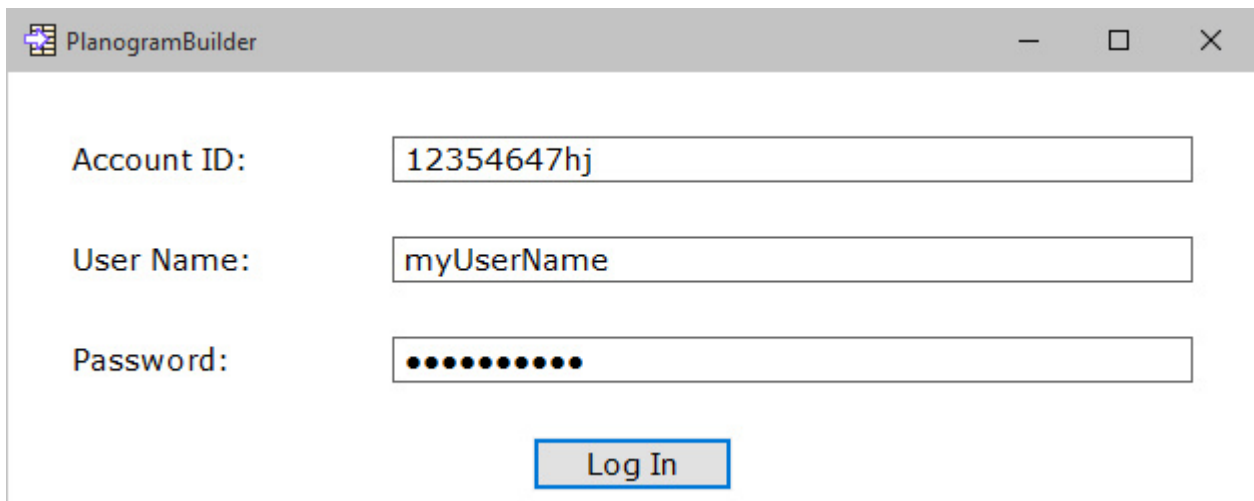
Launch the application

Once installation is complete, you can run PlanogramBuilder:

1. **Click on the PlanogramBuilder icon** on your Desktop or in your *Windows Start Menu* (*All programs* (or *All Apps*) > *PlanogramBuilder*)

2. **Enter your account ID, user name and password** as provided to you by email after purchase or registration. *Note*: if you are still using the web version and haven't received an email message showing your Account ID, you can find your Account ID on your PlanogramBuilder Web application login page.

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3. Click on **Login**.

Note: You still need to be connected to Internet when using PlanogramBuilder since the database is online and most functions work with dynamic aspx web content.

Note: By default, your login credentials are automatically remembered for subsequent use of PlanogramBuilder. If you prefer to enter your login information each time you launch the application, please see Startup Settings.

Startup Settings

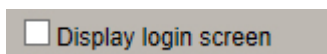*Video tutorial on this topic*: 3: Startup settings

Display login screen

If checked, forces PlanogramBuilder to always show the login screen. If unchecked, the login screen is bypassed when *Save user & password* is checked.

1. Click on Settings

2. In Settings affecting the current user only, under Login, change the following parameter:
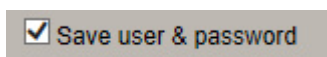

Save user and password

If checked, the application will remember the last entered user name and password so you don't have to type them again.

1. Click on Settings

2. In Settings affecting the current user only, under Login, change the following parameter:

Command line parameters

There are a few parameters you can add to the PlanogramBuilder shortcut or command to modify the way PlanogramBuilder runs.

Video tutorial on this topic: 3: Startup settings

AccountID

This parameter lets you predefine an account ID to use when launching PlanogramBuilder. This option is useful mostly if you use several distinct PlanogramBuilder account IDs. You can create several copies of PlanogramBuilder shortcut and assign a different account ID to each shortcut, so you will be able to launch directly with the desired account.

Value: any account ID can be used as value for this parameter.

Format: /AccountID=*value*

Example: *PlanogramBuilder.exe /accountID=goodcompany_ihrpz437*

Note: The *AccountID* parameter name is not case sensitive.

To enter or edit the parameter, do as follows:

1. *Right-click* on the **PlanogramBuilder shortcut***.*

2. In the *context menu*, click **Properties**.

3. In *Properties > Shortcut > Target,* type the parameter after the application path.
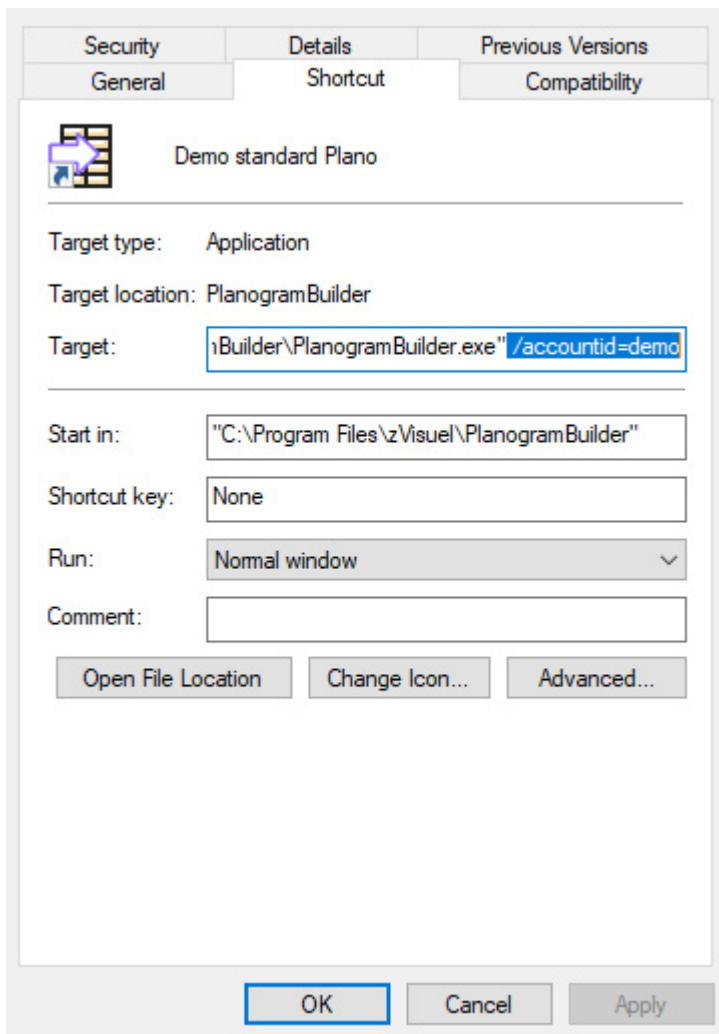
4. *Click* **OK** to save your changes.
5. Now *click* on the **shortcut icon** to start PlanogramBuilder using your parameter.

User Roles

PlanogramBuilder provides two possible user roles for each user, each role with different permission levels:

- **PlanogramBuilder Administrator**
- **Standard User**

Typically, only one or a few managing user(s) in your company is (are) *PlanogramBuilder Administrator(s).* The other users are only able to create, edit and publish planograms.

If your company has only 1 user, the user is automatically a *PlanogramBuilder Administrator*.

If you have more than 1 user, you can choose which user(s) should be *PlanogramBuilder Administrator(s),* and which should be *Standard User(s)*.

When you order your PlanogramBuilder user licenses, you will be asked by email which user role to assign per user. You can also write at any time to planogrambuilder@zvisuel.com to request changing the role of one or more users.

List of User Roles

Please find below a description of each user role:

PlanogramBuilder Administrator

PlanogramBuilder Administrators have access to all features of the application.

Here is the list of features available only to *PlanogramBuilder Administrators*:

Customizing and Editing the Product Database:

- Database Setup
- Clear Database
- Add Database Item
- Modify Database Item
- Delete Database Item
- Batch Import Database Items

Advanced Planogram Project Management:

- Template Projects
- Share All Projects
- Backup and Restore Projects

Set other preferences affecting all users in your account Id:

- Locked Bays for Standard Users
- Application Title
- Application Logo

So for example, when a *PlanogramBuilder Administrator* adds a product to your PlanogramBuilder database, this product instantly becomes available to each user of your company for planogramming. When a *PlanogramBuilder Administrator* changes the logo of your company in PlanogramBuilder, it applies to all other users.

Standard User

Standard Users can run PlanogramBuilder, set individual user preferences, use the product database content, create, save and publish planograms.

So typically you will assign *Standard User* role to users who don't manage the product database and don't need to manage the planogram projects created by other users.

Main Settings

Video tutorial on this topic: 2: Main settings

Discover how to set PlanogramBuilder to match your language, measurement unit and other preferences.

- Settings under **Settings affecting the current user only** apply only to the current logged-in user. These settings are available to each user.

- Settings under **Settings affecting all users** apply to all users in your account ID. These settings are only available to PlanogramBuilder Administrators.
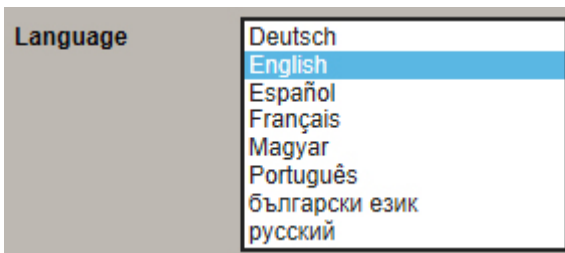
GUI Language

The PlanogramBuilder **Language** lets you change the language for all the elements of the user interface, such as commands and buttons.

1. Click on **Settings**.

2. In **Settings affecting the current user only**, below **Regional Settings**, next to **Language**, select your preferred language from the list.

Note: Currently, **German**, **English**, **Spanish, French**, **Hungarian**, **Portuguese**, **Bulgarian** and **Russian** are available. If you wish to have the interface translated to another language, contact us at planogrambuilder@zvisuel.com

Note about this User Guide language: The PlanogramBuilder documentation is published online in English only, however if you set the user interface to a different language, this user guide will be automatically displayed in that language using Google translation for your convenience. Beware that the names of commands and other interface elements may differ in the automated translation from those in the user interface. In case of doubt always consider the names displayed in the user interface as references.

Measurement unit

Each user can select in which **Measurement unit** dimensions are displayed for products and shelving items. You can choose **mm**, **cm** or **inch**. The *inch* unit is displayed in decimal inches. The default unit is **cm**.

1. Click on **Settings**.

2. In **Settings affecting the current user only**, Below **Regional Settings**, next to **Measurement unit**, click on the radio button corresponding to your preferred measurement unit.

Note to PlanogramBuilder Administrators:

The selected *Measurement unit* is also used when you create, edit or export products with Database Editor (see Database Item Properties: width, depth and height).

The selected *Measurement unit* will also be used by default to batch import products, but you can override the selected unit. Please see Batch Import Database Items for further explanations.
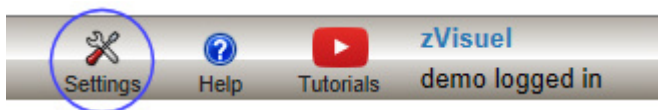
Application Title

Note: Only available to a PlanogramBuilder Administrator

The **Application Title** lets you specify a title for all PlanogramBuilder users in your company. Normally, the title already shows your company name or your name if you are an individual. The title appears in light blue at the upper right corner of PlanogramBuilder screen:

**To set the title:**

1. Click on **Settings**.

2. Under **Settings affecting all users**, next to **Application Title**, type in the name of your Company or the title of your choice.

Application Logo

Note: Only available to a PlanogramBuilder Administrator

The **Application Logo** displays an image on the title bar visible to all PlanogramBuilder users in your company. Typically you can display your own company logo:
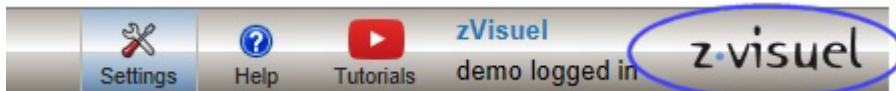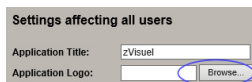

To upload the logo:

1. Click on **Settings**.

2. Under **Settings affecting all users**, next to **Application Logo**, click on **Browse**.

3. Select an image file on your computer.

4. Accepted formats are JPG, GIF and PNG.

5. Images with a transparent background are supported in PNG format. When such image is used, the normal PlanogramBuilder title bar is displayed behind the transparent part of the logo image.

6. The image must have a fixed height of 41 pixels and a maximum width of 200 pixels.

User Interface Scaling

The scale of PlanogramBuilder user interface elements is controlled by your Windows display scale settings. Specifically:

Interface Overall Scaling

You can increase the scale of elements for all Windows applications including PlanogramBuilder as follows:

1. Close PlanogramBuilder.
2. Open *Windows Settings > Display*.
3. If you have multiple displays, click on the desired display.
4. Under *Scale and layout > Change the size of text, apps and other items* to the desired scale.
5. Restart PlanogramBuilder. The application interface is now scaled as per your choice.

Note: If the texts in PlanogramBuilder become blurry, check our troubleshooting in Blurry text in the GUI.

Interface Text Scaling

You can increase just the size of text elements for all Windows applications including PlanogramBuilder as follows:

1. Close PlanogramBuilder.
2. Open *Windows Settings > Ease of Access > Display*.
3. Under *make text bigger > Drag the slider until the sample text is easy to read, then click Apply.*
4. Restart PlanogramBuilder. The application interface text is now scaled as per your choice.

5 Minutes Tour

This is a quick introduction to get started with PlanogramBuilder.

Screen Layout

Here is an overview of the PlanogramBuilder user interface:
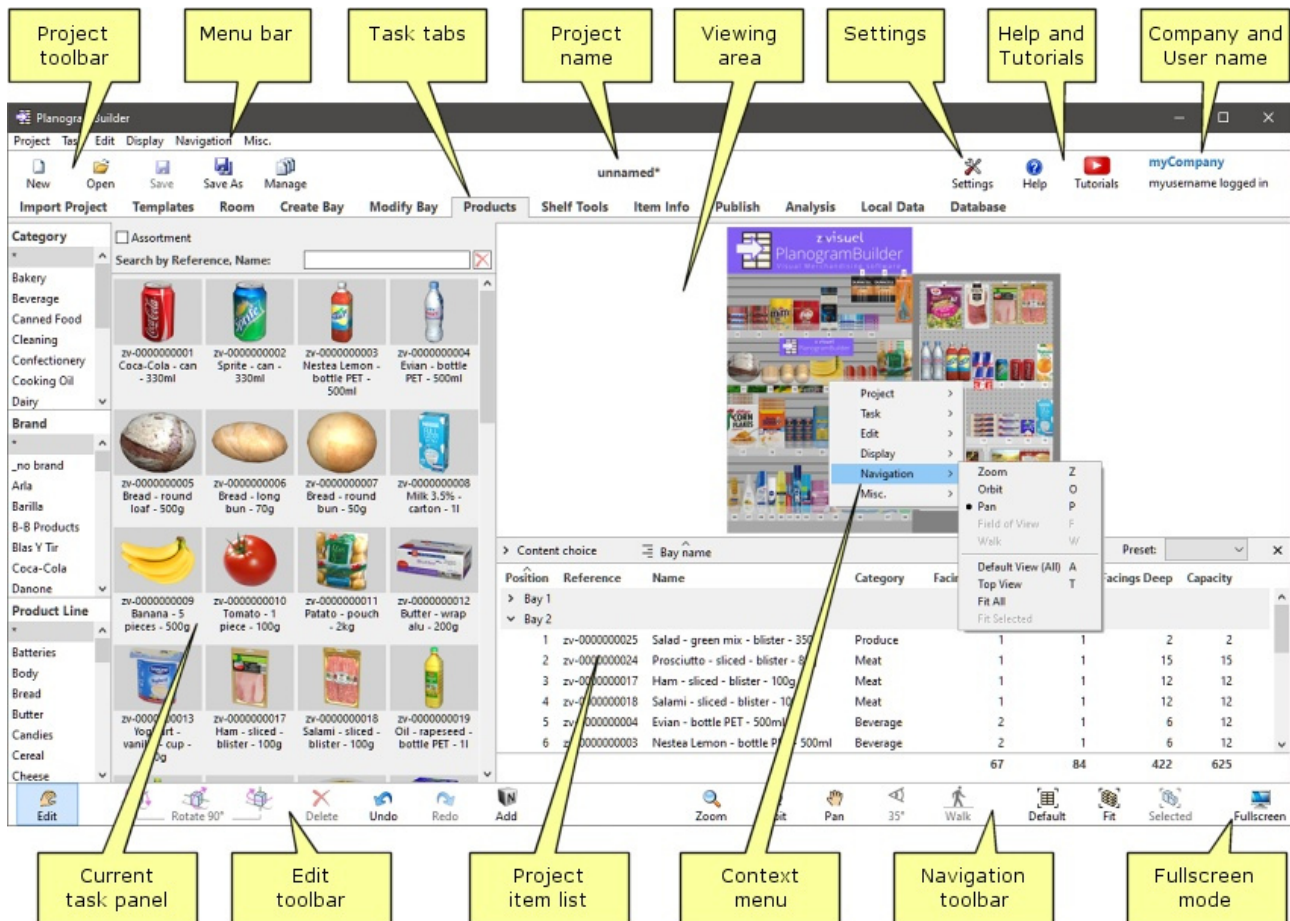
The work screen is divided in two main areas: the current task panel on the left and the viewing area (where you see the planogram being built) on the right. The content of the left pane is dependent on the current task that you select by clicking on its tab.

There are also several buttons at the top and bottom of the work screen. The ones in the upper left area are typically used to save and load whole projects whereas the ones in the lower area let you modify the current project or change the way you look at it.

Most tools and commands are also available in the menu bar and in the context menu.

Place Your First Product

Note: A set of sample products and accessories is provided with PlanogramBuilder. This lets you test the application without having to add your own products. Database (Products, Accessories, Materials) chapter explains how to delete these products and add your own.

1. After logging-in, make sure the Create Bay task is selected, then click on the **Add** button to create a new bay. (You will learn later how to specify your own parameters for new bays in Create Bay.)
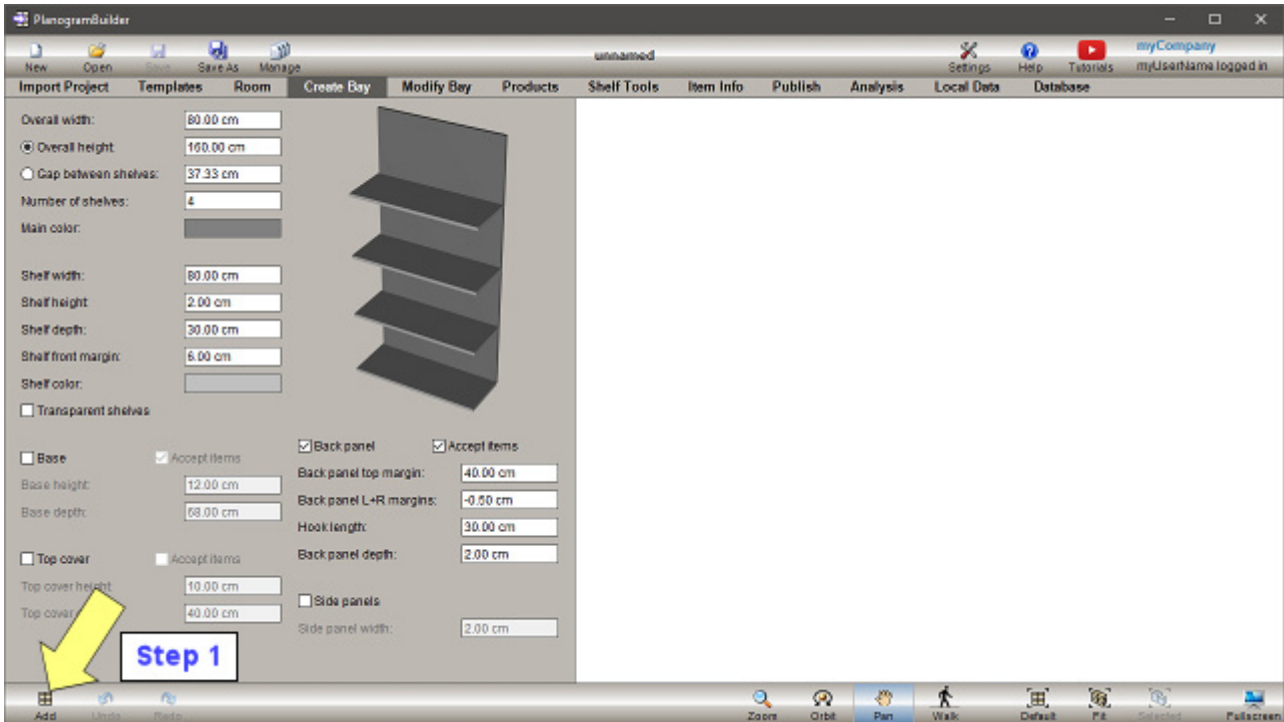
2. After the bay has appeared, click on the **Products** Tab.
3. Click on *Confectionery* under *Category*.
4. **Drag & drop** products from the library to shelves in the visual area.
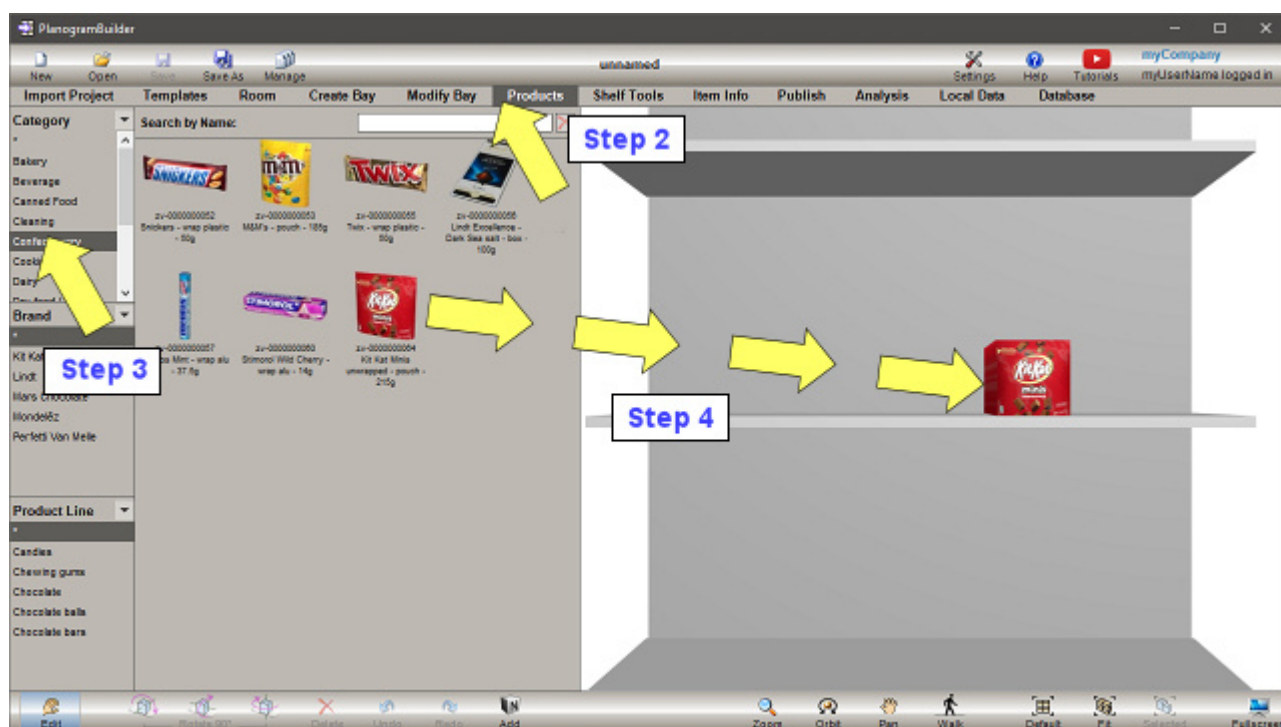
5. That's it. You can now try to add more products and re-arrange them on the shelves.

Database (Products, Accessories, Materials)

Import Project | Templates | Room | Create Bay | Modify Bay | Products | Shelf Tools | Item Info | Publish | Analysis | Local Data | Database

Video tutorial on this topic: 4: Introduction to the database

PlanogramBuilder stores all your Materials, Products and Accessories (accessories) in an online database that is automatically created and hosted on our application servers. As a PlanogramBuilder customer, you don't have to install or set up any database, but you need to add your own products to your database.

Each PlanogramBuilder customer has a distinct database so you won't risk sharing any confidential information with other customers. Each customer can have an unlimited number of registered users all accessing the same customer database. This system keeps your product assortment always up to date for each PlanogramBuilder user.

When you launch PlanogramBuilder, the program connects to your database and looks for the items in the database. All the items found in your database appear in the Material catalog, Product Catalog or Accessory Catalog, ready to drag and drop into your planograms projects.

In order to manage the Item List in your database, PlanogramBuilder provides a set of features, most of them accessible from the ***Database*** task.

Important Note: **Standard users cannot edit the database. They have to contact a PlanogramBuilder Administrator to request changes in the database.**
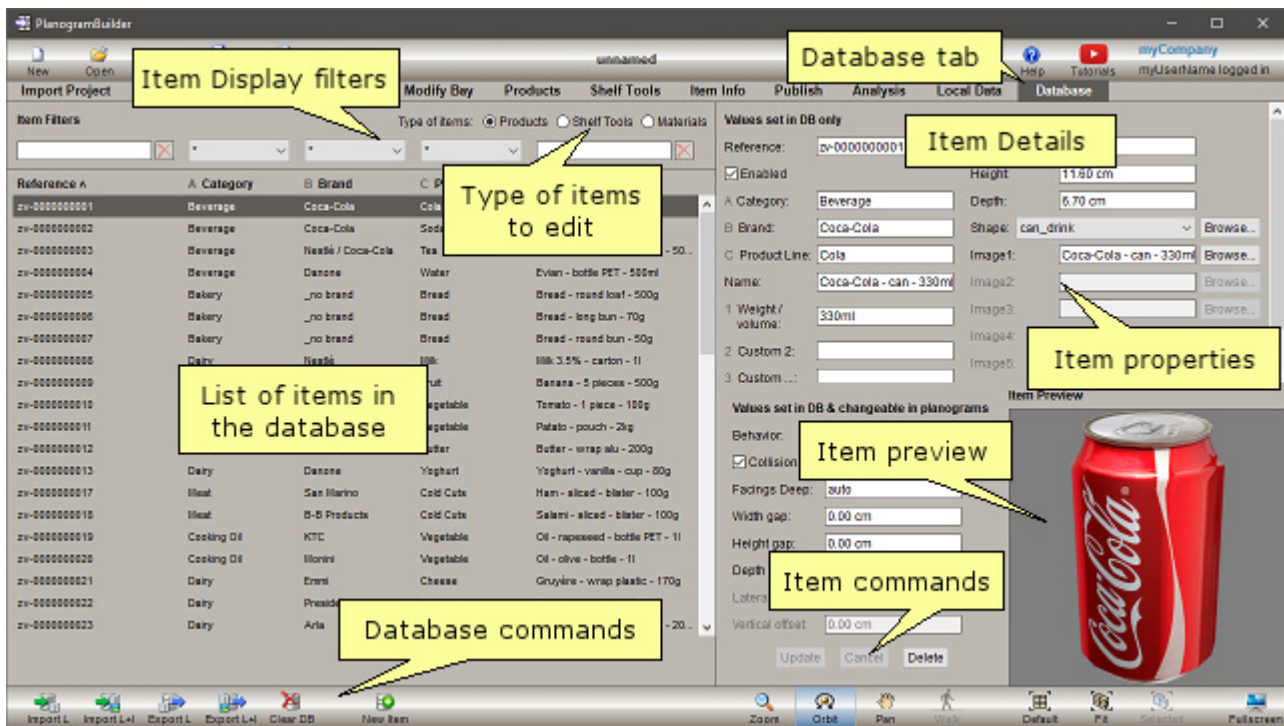
Database Editor

Import Project | Templates | Room | Create Bay | Modify Bay | Products | Shelf Tools | Item Info | Publish | Analysis | Local Data | Database

Video tutorial on this topic: 4: Introduction to the database

Database Editor provides you with the tools to view, add, edit and delete materials, products and accessories in your database.

To launch the Database Editor, click on the **Database** tab.

View Database Items

Note: If you have read-only access to the database (as a Standard User), the following database commands are hidden: **Import**, **Clear** and **New Item**. Also, the item details are read-only.

Type of items to manage

Import Project Templates Room Create Bay Modify Bay Products Shelf Tools Item Info Publish Analysis Local Data **Database**

Radio buttons let you choose if you want to work on ***Materials, Products*** or ***Accessories***:

- **Products** are typically all sellable items.
- **Accessories** are typically props displayed on shelves to enhance product presentation: shelf strips, labels, headers, posters, products on display out of box, etc.
- **Materials** are used to make room elements look more realistic.

Type of items: ● Products ○ Shelf Tools ○ Materials

Click on the radio button of your choice to select the type of item you want to display. For example, when *Products* is selected, you won't see *Materials* or *Accessories*. You can switch from one type to another at any time.

Item List

Import Project Templates Room Create Bay Modify Bay Products Shelf Tools Item Info Publish Analysis Local Data **Database**

The left side of the screen shows a list of all your items in a table similar to a spreadsheet. Each line contains one item and each column corresponds to the following properties: *Reference*, *Name* and classification columns (*A:*, *B:* and *C:*), which are detailed in Database Item Reference.

This is where you can view and select items in the database.

To select an item, click on its line in the list.

Use the Up/Down arrow keys to switch to the previous/next item.

A maximum of 50 items is shown on each page. If there are more than 50 items, they are displayed on additional pages. To select another page to display, use the page navigation tools in the lower left corner of the panel:
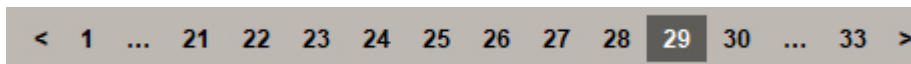

- Display a page by clicking on one of the 10 visible page numbers.
- Display the previous/next page by clicking on the left/right arrow (shortcut key: *Left/ Right Arrow*).
- Display the previous/next page set by clicking on the left/right 3 dots.

Note: If your screen is small, scroll down to see more items.

Note: *Materials* don't have classification properties.

Tip: By clicking on the headers at the top of each column, you can sort the list according to the column content. For example to order the list by product names click on the *Name* header and to order it by references click on *Reference*. Clicking again on a header reverses the order.
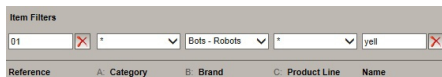
Item Filters
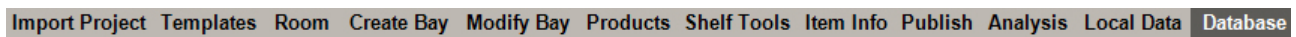
By default, the *Database Editor* shows the complete Item List in its listing. If you have many items in your database, you can use one or several filters to display only items matching the chosen filter(s).

Filters are available for the *Reference*, *Name* and *classification* columns (*A:*, *B:* and *C:*).

After you select or type values for filtering, the other drop-down lists only display items matching that filter combination, so you can narrow down quickly on available items.

Selecting the ***** symbol means all available items will be displayed in the list.

For the *Reference* and *Name* filters, you can type any text string: only items with values matching your string will be displayed. The filter boxes accept single or multiple keywords following these rules:

- Multiple keywords must be separated by spaces
- All keywords must be present
- Keywords are not case sensitive
- The order of keywords doesn't matter

Example: typing **frozen CHOCOLATE** in the box above **Name** will display all the items containing **chocolate** AND **frozen** in their name.

Note: Items with values of different text cases are grouped in the *Database Editor*. Ex: *Lego* and *LEGO* are grouped as the same value.

Note: *Materials* don't have classification filters.

Item Details
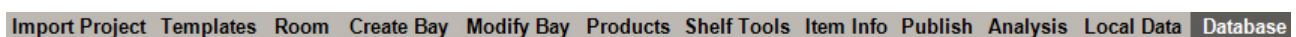
The right side of the screen shows all the properties of the selected item. This is where you can review and edit each item attributes, such as name, dimensions, shape, image(s), etc.

Note: The available properties vary depending on the type of items being viewed.

Item Preview

When you select an item in the list, this area displays a small preview of the item in 3D.

Note: you can Zoom, Pan and Orbit the item in the preview, and also see it in Fullscreen using the standard 3D navigation tools on the right side of the bottom toolbar.

Database Setup

Note: Only available to a PlanogramBuilder Administrator

Video tutorial on this topic: 4: Introduction to the database

In this section, you will learn how to customize your database structure to match your product classification structure.

***Important Note*: Please perform this step prior to start filling your database with products, because your customization will have an impact on all future Database Editor Tools.**
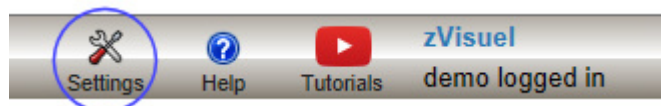
Item Classification Properties

PlanogramBuilder provides 3 properties (A:, B: and C:) to classify your products and accessories as you do in your business (not applicable to *materials*). By default, these properties are respectively labeled *Category*, *Brand* and *Product Line*. You can change these labels to match your own classification criteria.

Reference ∧	A Category	B Brand	C Product Line	Na
zv-0000000001	Beverage	Coca-Cola	Cola	Co
zv-0000000002	Beverage	Coca-Cola	Soda	Sp
zv-0000000003	Beverage	Nestlé / Coca-Cola	Tea	Ne
zv-0000000004	Beverage	Danone	Water	Ev

To customize these properties, do the following:

1. Click on **Settings**.

2. Under **Settings affecting all users**, **Item Classification Properties**, select a label from the drop-down list for each property (A:, B: and C:).

Item Classification Properties

Classification property A:	Custom
	Country
Classification property B:	Category
Classification property C:	Subcategory

The above image reflect example 3 on table below

Standard labels: Brand, Brandline, Category, Group, Main Group, Manufacturer, Product Line, Region, Sub-brand, Subcategory, Subgroup.

Custom labels: If the standard labels don't fit your needs, you can also select *Custom* in the drop-down list. In this case a new text field will appear where you can type a custom label, such as shown below with the labels *Year* and *Country*.

For example, you may choose one of the following combinations of classification criteria:

	Default label	Example 1	Example 2	Example 3
Classification property A:	Category	Category	Category	Country
Classification property B:	Brand	Subcategory	Group	Category
Classification property C:	Product Line	Region	Year	Subcategory

3. Your choices will be reflected in Database Editor header labels, as well as in Product Catalog, Accessory Catalog and reports.

Item Custom Properties

Import Project Templates Room Create Bay Modify Bay Products Shelf Tools Item Info Publish Analysis Local Data **Database**

PlanogramBuilder also provides up to 6 additional user-defined properties for items to let you optionally add attributes for each *product* or accessory (not applicable to *materials*). To activate a custom property, you must enter its label. Once labeled, the property becomes available in your database and you can then assign any text value for each item in your database. You can then output the values of these properties in your published reports for example.

As an example, let's create a property to hold the ***weight*** of your products in your database:

1. Click on **Settings**.

2. Under **Settings affecting all users**, **Item Custom Properties***,* type in the label of **Custom property 1**: *Weight*, then press enter to validate.

Item Custom Properties

Custom property 1:	Weight
Custom property 2:	
Custom property 3:	
Custom property 4:	
Custom property 5:	
Custom property 6:	

3. The *Weight* **custom** property is now defined and *Weight* values can be assigned to your products and accessories. The custom property can also reflected within several PlanogramBuilder features:

- Database Editor detailed view

- Project Item List
- Report lists
- Import projects
- Schematic view labels
- Products / Accessories catalog captions and search

Note: Custom properties which you have not labeled are not available for your products and accessories.

Note: Unicode characters can be used for the labels of *Item Custom Properties*.

Export Database

Import Project Templates Room Create Bay Modify Bay Products Shelf Tools Item Info Publish Analysis Local Data **Database**

Video tutorial on this topic: 8: Exporting the database

You can export your database (products, accessories, materials) as a spreadsheet and also include your item image files in the export.

Exporting your database serves the following main purposes:

- Create a full backup of your database. We strongly advise doing regular backups so you can recover your database in case you have accidentally cleared it or deleted items.

- Create a template file in the correct format and Batch Import Database Items from a spreadsheet. We strongly advise performing this step before your first batch import.

- Create a spreadsheet with your current database items to resynchronize in your spreadsheet editor any database changes made within Database Editor.

There are two commands to export your database:

Import L   Import L+I   Export L   Export L+I   Clear   New Item

Export L exports the list of all your materials, products and accessories including their properties, from your PlanogramBuilder Database to your computer. Use this command to create a template file for batch importing items, or to resynchronize items when you don't need to backup the item images.

Import L   Import L+I   Export L   Export L+I   Clear   New Item

Export L+I does the same and also exports all images stored in the database. Use this command to create a full backup of your database, or to resynchronize items when you need to also backup the item images.

The exported item list can be either in Microsoft Excel format (*.xls or *.xlsx), or in Unicode Text format (*.txt), compatible with any Spreadsheet application.

The exported images are in the same format as they were originally uploaded.

Follow these steps to export your product database:

1. In Database Editor, click on the **Export L** or **Export L+I** button.

2. You will be prompted to select a folder in which to save the files and to type a filename for the list of products. We strongly advise to select an empty folder or to create a new folder, so that your exported files won't get mixed-up with other existing files on your computer.

3. Once you have selected a folder, chosen the file type and typed a filename, click on the **Save** button.

4. Wait for all the files to be downloaded onto your computer. The first file to be exported is the listing of items, which is very fast to download, then the images if you chose **Export L+I**.

Tip: you can abort the export process by simply clicking on the **Export** button once again during the export process.

Tip: We advise choosing the **.xls* or **.xlsx* format. Otherwise if you select the **.txt* format, a number sign [#] is automatically added in the exported txt file as a prefix to all item *References* that start with a [0] or that are large numbers (more than 11 digits). This convention is a work-around to display these numbers correctly if you open the exported list in Excel, which doesn't support long numbers.

Note: The images are saved in a new folder named *Images* (or an equivalent translation if PlanogramBuilder is set to another language than English). Images can take a long time to export depending on the number of images, their size and the speed of your Internet connection.

Note: The dimensions of your items (width, depth and height) are exported in the current active measurement unit. Please see Measurement unit for details on setting this preference.

Clear Database

Import Project Templates Room Create Bay Modify Bay Products Shelf Tools Item Info Publish Analysis Local Data Database

Note: Only available to a PlanogramBuilder Administrator

This command lets you reset your entire PlanogramBuilder Database to an empty state. To delete all items from the database:

1. Click on the Clear button on the bottom toolbar.

2. Then confirm by clicking OK. This will remove all products and accessories and your database will then be completely empty.

Caution: **All materials (except the predefined materials), all products and all accessories will be permanently deleted from the database and cannot be recovered after this operation.** Make sure to at least back-up your database before Clearing Database. See Export Database for instructions to back-up.

Tip: If you have recently started using PlanogramBuilder and you have finished testing the application with the sample products provided by zVisuel, we advise you to Clear the database before inserting your own products in the database. This will avoid mixing up the sample products with your own products. You can also delete the sample project named *sample planogram* provided with PlanogramBuilder.

Add Database Item

Import Project Templates Room Create Bay Modify Bay Products Shelf Tools Item Info Publish Analysis Local Data Database

Note: Only available to a PlanogramBuilder Administrator

Video tutorial on this topic: 5: Adding your first product to the database

Video tutorial on this topic: 6: Adding products of various shapes to the database

Video tutorial on this topic: 7: Adding accessories to the database

In this section we explain how to add *materials*, *products* and *accessories* to the PlanogramBuilder database so you can then create planograms with your own items.

Tip: The process described in this section is for adding one item at a time. You can also use Batch Import Database Items to add several items quickly.

*Tip: W*e advise backing up and then Clear Database to save and remove the sample items provided with the application before adding your own items.

Instructions:

1. Select the **type of items** to add: *Products* or *Accessories* or *Materials*.

2. Click on the **New Item** button.

3. In the Item Details on the right of your screen, fill-in the Database Item Properties to define your new item. Please consult the Database Item Reference for the detailed description of each property.

Item Details

Values set in DB only

Reference:	112345678 ✕	Width [cm]:	10
Enabled:	☑	Height [cm]:	17.5
A Category:	Sample Items	Depth [cm]:	1.75
B Brand:	Bots - Accessories	Shape:	blister_rectan ⌄ Browse...
C Product Line:	Modules	Image1:	z.02.12.02.jpg Browse...
Name:	AI module	Image2:	Browse...
1 Weight:		Image3:	Browse...
2 Custom 2:		Image4:	Browse...
3 Custom 3:		Image5:	Browse...
4 Custom 4:		Image6:	Browse...
5 Custom 5:		Color:	
6 Custom 6:			

Values set in DB & changeable in planograms

Item Preview

Behavior:	pegged ⌄
Collisions:	☑
Facings Deep:	
Width gap [cm]:	
Height gap [cm]:	
Depth gap [cm]:	
Lateral offset [cm]:	
Vertical offset [cm]:	

Create   Cancel

4. New Item Details for product

New Item Details for material

5. **Create / Cancel**: Once you have entered all the desired values, press the *Create* button to validate the creation of your new item. (You can also press the *Enter* key on your keyboard.) Your new item will be created and becomes selected in the Item List. Otherwise, if you have changed your mind and don't want to create the new item, you can press the *Cancel* button (or the *Escape* key).

Notes for all types of items:

Note: Properties in *Item Details* are divided into 2 groups:

- **Values set in DB only**: the values for these properties can only be set in the database.

- **DB values that can be modified in planograms:** the values for these properties can be predefined in the database, but you can additionally set or override these values per item in any planogram project. For example, you can change a product that was defined as *Pegged* in the DB to *Stackable* only in a particular planogram for a special case.

Tip: If you have activated one or more filter(s), the values used by the filter(s) will be automatically pre-filled in the corresponding text field. (See Item Filters.) You can however overwrite the pre-filled values by typing any other text.

Notes for materials only:

Tip: For materials, first *Browse* for the image of your material. This will automatically fill the *Reference* and *Name* properties with values.

Notes for Products and accessories only:

Notes For the fields **A, B** and **C** (the default labels are **Category***,* **Brand** and **Product Line**):

- Please see Item Classification Properties before entering any value.

- If you leave a value empty in one or more of these fields, your item will be classified as (undefined) in the Catalog for this classification level. For example, if you don't enter a *Brand* value for your new product, the product will be displayed in the catalog when you click on the (undefined) Brand.

- Items with same text values but different cases are grouped in the *Database Editor* and Item *catalog*s. Ex: *Lego* and *LEGO* are grouped as the same value.

Note: For the fields **1** to **6**, please see Item Custom Properties before entering any value.

Note: The **Shape** field is used by PlanogramBuilder to generate 3D representations of your products. You can choose the closest matching shape for each product in the drop-down list, or import your own 3D models using the **Browse** button. Please refer to the **Shape** property description in Database Item Properties.

Note: With **Image1**, depending on the assigned shape, you can apply an image onto your item. Click on the **Browse...** button, browse for your image file, and then click the **Open** button. See Guidelines for Images for preparing images.

Note: With **Image2, Image3, Image4, Image5, Image6**, depending on the assigned shape, you can apply additional images to your item, click on **Browse...**, select your image file, then click the **Open** button. Only some shapes support more than one image: see Standard 3D Shapes.

Note: See Database Item Properties for details on what the **Color** is. See Standard 3D Shapes to see how the color is applied to your items. **Color** can be entered in three different ways:

- Click on the colored rectangle to display the color palette and select the desired color.

- Click on the color picker icon to pick any color from the 3D item preview area. While pressing your mouse button over any area with the color picker, the colored rectangle swatch is updated with the selected color. Release your mouse button to apply the color. *Note*: the color picker mode remains active until you click on another tool such as Orbit.

- Type the color value using standard HTML color codes (ex: #FF0000 for red).

Note: We do not provide a database of products with PlanogramBuilder. Typically each client provides or enters directly the information about their products: name, EAN, dimensions, etc. and the image(s) for each product. If you don't have such data available, you may be able to obtain them from the product manufacturer or from third-party product databases, such as the ones listed below:

- https://www.ean-search.org/

- https://www.upcdatabase.com/

- https://www.gs1.org/services/gdsn

- https://www.mynetfair.com/

- https://www.grocery.com/open-grocery-database-project

- https://openfoodfacts.org/

Edit Database Item

| Import Project | Templates | Room | Create Bay | Modify Bay | Products | Shelf Tools | Item Info | Publish | Analysis | Local Data | Database |

Note: Only available to a PlanogramBuilder Administrator

Tip: The process described in this section is for modifying one item at a time. Another feature, Batch Import Database Items, lets you to update batches of items and is much quicker when you need to modify several items in one shot.

1. Select the type of items to edit with the radio button: *Materials, Products* or *Accessories*.

2. Find the item you want to modify in the list.

Note: You may have to scroll down to access the bottom of the list if there are many items. If you have more than 200 items listed, the list will split into several pages. Click on the page numbers below the list to access other pages.

Tip: Use the Item Filters to reduce the number of items displayed and find your item faster.

3. In the *Item Details* area, enter the desired values in the available property fields. Please refer to the section Add Database Item as the process is almost the same. The only difference is that you cannot edit the *Reference* value of an existing item.

4. Press the **Update** (*Enter* key) or **Cancel** (*Esc* key) button to validate or cancel changes.

5. After pressing **Update**, the item will be re-generated in 3D. This may take some time if you are uploading an image.

6. You will see your updated item in the **preview area**.

Delete Database Item

| Import Project | Templates | Room | Create Bay | Modify Bay | Products | Shelf Tools | Item Info | Publish | Analysis | Local Data | Database |

Note: Only available to a PlanogramBuilder Administrator

1. In the items list, find and select the item you want to remove from the database.

2. In the *Item Details* area, press the **Delete** button. The item will be removed from the database and from the catalog (*Materials*, *Products / Accessories* tasks).

Note: Use great caution with the *Delete* function, as it will permanently delete the item for all users in your company.

Batch Import Database Items

| Import Project | Templates | Room | Create Bay | Modify Bay | Products | Shelf Tools | Item Info | Publish | Analysis | Local Data | Database |

Note: Only available to a PlanogramBuilder Administrator

Video tutorial on this topic: 9: Batch importing items in the database

If you have many materials, products or accessories to import to your PlanogramBuilder database, you can use the import commands to **add or modify multiple items in one shot**.
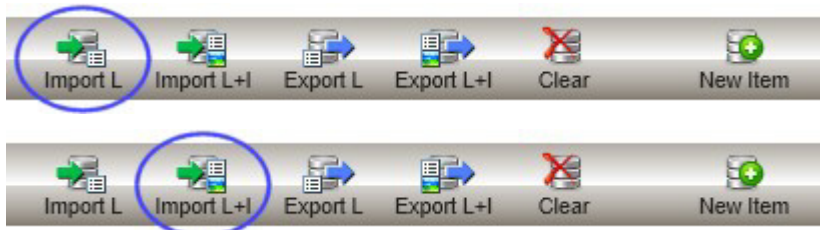
The **Import L+I** command lets you add or update items in the PlanogramBuilder database from a spreadsheet file on your computer. It also uploads the item image files referenced in your input file.

The **Import L** command does the same, but without uploading the image files. Any image column (*image1*, *image2*, *image3*, etc.) present in your input file is simply ignored.

Important Tip: **As a starting point to prepare your Item List for import, we strongly suggest exporting the current database from PlanogramBuilder and then using the exported file as a template for importing.** This is especially useful to easily get the proper header names if you have set the user interface to a language other than English.

Tip: Once you have successfully tested batch importing some items, we advise to Clear Database to remove the sample products and accessories provided by zVisuel before importing your own products.

Here are the instructions to prepare your data for import:

1. Create a spreadsheet with one line per material, product or accessory, and define a column for each item property labeled exactly as in Database Editor. To import values into your Custom Properties, the header of each column must match exactly the labels that you have set in the Settings (see Database Setup). A description of each available property is available in the section Database Item Properties.

Example of spreadsheet for import

Reference	Category	Brand	Product line	Name	Width	Height	Depth	Image1	Shape	Behavior	Color	Type
045631	Beverage	Coca-Cola	Zero	Coca-Cola Zero 500ml	6	20	6	045.png	cylinder	standard	#ff0000	
054256	Beverage	Coca-Cola	Cherry	Coca-Cola Cherry 500ml	6	20	6	042.png	cylinder	standard		
136853	Beverage	Sprite	Cherry	Sprite Cherry 330ml can	8	11	8	153.jpg	cylinder	standard	#6C0232	
bjh002	Beverage	Coca-Cola		Coke shelf strip 80cm	80	2.5	0.3	002.jpg	box_front	shelf_strip	#6C0232	1

2. In order to import *accessories* or *materials*, an additional column with a header named **Type** must be present in the spreadsheet: if a cell in this column has the value **accessory**, the item will be imported as a accessory. A value of **material** is for *materials*. Leave this cell empty or enter **product** for items that are *products*.

3. Save your spreadsheet as an **Excel file (*.xls or *.xlsx)**, or if you can't save as Excel files from your application, save as a **Unicode Text file (*.txt)**. (*Note:* legacy *Tab Separated *.txt files* are still supported as in past versions, but this format doesn't support non-Latin characters.)

4. Place all the **image** files to upload in the same folder as your spreadsheet File, or in any of its sub-folder(s). If your images are already in a folder on a different path on your computer, you can also create a shortcut to this folder in the folder where the Excel file is located. This way you don't have to copy the actual image files to the required folder. PlanogramBuilder will automatically upload the referenced images to the database upon import and generate the 3D models using these images. Please refer to Guidelines for Images for further instructions.
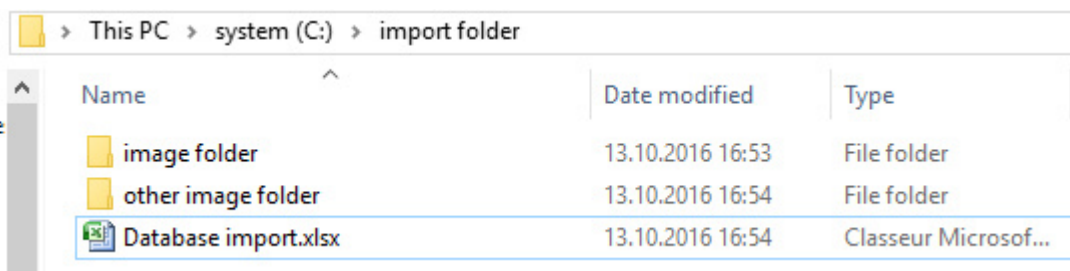
Example of suggested folder structure for database import with images

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5. In PlanogramBuilder, go to the **Database** task, click on the **Import Import L+I** button, then select the spreadsheet file you have prepared and wait for all items to be generated.

6. Your items are now shown in the Database list as well as in the Materials, Products and Accessories catalogs.

Warning: If you edit your spreadsheet in Excel, *References* (SKUs, Gencode or EANs) or other values expressed as long numbers or numbers starting with "*0*" may not display correctly, because Excel doesn't support these numbers. In this case, as a workaround, you have two solutions:

- If you want to save the file as native Excel files (xls or xlsx), set the cells containing such numbers to text so your item Reference will be displayed correctly.

- If you want to save the file as Unicode text, you can add a number sign [#] as a prefix to an item *Reference*. PlanogramBuilder then automatically removes the first character upon import if it's a [#] so your item Reference will be displayed correctly in PlanogramBuilder.

Ex: A 13 digit reference code *0235485217568* is not supported as a number by Excel. So change the containing cell to **text** and Excel will then display it correctly. PlanogramBuilder will therefore also display *0235485217568* in its database after import.

Notes:

Cancelling the import in progress: You can cancel the command **Import L+I** by clicking on its icon when a batch image upload is going on.

Column header names: The header name of each column in your spreadsheet must match exactly each available property in Database Editor.

Column header names for non-English languages: If you have set the language of the user interface to a language other than *English*, the names of the database properties are displayed in the language you chose. When importing, you must also name your source spreadsheet column headers as they appear in your language in Database Editor.

Non-Latin characters: You can use non-Latin characters for most text entries. For example, you can enter product names in Greek language. Please see Database Item Properties to find out which text columns support Unicode characters.

Column order: The order of the columns in your spreadsheet does not matter for importing, as the importer compares the header values to match columns.

Customizable properties: Please see the section Database Setup for help on defining the names of the 3 classification properties and the 3 custom properties in PlanogramBuilder.

Product dimensions: You can force a measurement unit for the dimensions of your items by adding the unit abbreviation within square brackets after the header. Here are the 4 possible options:

- **No unit specified** (example: *Width*). The unit used for import will be the current preferred PlanogramBuilder unit. See Measurement unit for details on this setting.

- **[mm]** (ex. header: *Width [mm]*). The product width will be interpreted as millimeters.

- **[cm]** (ex. header: *Width [cm]*). The product width will be interpreted as centimeters.

- **[in]** (ex. header: *Width [in]*). The product width will be interpreted as decimal inches.

Color column: *Color* values are specified using the corresponding HTML color code including the # sign. Please see the Database Item Properties for details on the *Color* property.

Type column: Please see the Database Item Properties for details on the *Type* property.

Rule to determine if an item will be added or modified

For each item listed in your spreadsheet, the *Reference* property value determines this:

- If an item *Reference* in your spreadsheet cannot be found in your PlanogramBuilder database, a new item will be created.

- If an item *Reference* in your spreadsheet already exists in your PlanogramBuilder database, the item will be updated to match the values from your spreadsheet.

Rules for missing columns

When you import an item, the only compulsory column in your spreadsheet is the *Reference.* If you omit other columns, PlanogramBuilder fills their values according to the following rules:

- If the item *Reference* already exists in the database and the missing column value is already defined there, the existing database value is kept unchanged.

- If the item *Reference* already exists in the database but the missing column value is not defined there, or if the imported item *Reference* doesn't exist yet in the database, default values are applied for properties when applicable, otherwise values are left empty.

Example 1: Add new items to the database from scratch. Create a spreadsheet with properties *Reference*, *Name*, *Category*, *Brand*, *Product Line*, *Width*, *Depth*, *Height*, *Image1* and any additional optional columns if you wish. Then use the **Import L+I** command.

Example 2: Update the *Names* of several items that are already in the database by simply importing a spreadsheet with two columns: one with the existing *References* and one with the new *Names*. Use the **Import L** command.

Example 3: Update several Database Item Properties such as *Names*, *Category* or *Dimensions* without re-uploading the item images. To accomplish this, use the **Import L** command. Any image column in your source file will just be ignored.

Rules for empty cells

When you import an item, if you leave some cells empty under supported columns, the corresponding existing database values are overwritten by default values if applicable, otherwise left as blank values. The same rule applies to new item *References*.

Example 4: Remove images from one or several products by importing a spreadsheet with blank cells under the *Image1*, *Image2* and/or other *ImageN* columns. Use the **Import L+I** command.

Example 5: Update images of products by importing a spreadsheet with new images referenced in the *Image1*, *Image2* and/or other *ImageN* columns. Use the **Import L+I** command. All images referenced in your file will be re-uploaded. *Tip*: If you only want to update images of some products, don't put empty cells because this would remove the images from the corresponding products. Instead, create an input file with only the lines for products that need updated images.

Example 6: Import a spreadsheet with blank cells under the *Collisions* column to reset all existing item collision values to the default (*Yes*). Use the **Import L** command.

Example 7: Import new items from a spreadsheet with blank cells under the *Behavior* column. This will set all item behaviors to the default value (*Standard* for products, *Panel* for accessories). Use the **Import L** command.

Database Item Reference

This section provides the complete reference to integrate *materials*, *products* and *accessories* in your PlanogramBuilder database.

The properties are listed in the same order they appear in the exported database columns.

Database Item Properties

Property Name (Column header)	**Property Value** (Column content)
Reference	A compulsory unique reference code for each item. You can use the EAN, UPC, SKU code or any other unique reference. (ex: 045631) *Note*: valid characters are [0-9][A-Z][a-z][the space character]$&@=.,;-_!^~)(][}{ Invalid characters are replaced by an underscore [_]. *Note*: the number symbol [#] is not allowed in Database Editor field, but can be used with a special meaning when importing or exporting the database. *Note*: For materials, a Reference value is automatically assigned but you can override the automatic value if you wish.
Classification property **A** [*1] [*2] (ex: **Category**) (default value: *empty*)	For each item, the value corresponding to the selected property. (ex: *Drinks*) *Note*: items with empty values are shown in the catalog as (undefined) for this classification property. *Note*: Items with values of different text cases are grouped in the *Database Editor* and Item *catalog*s. Ex: *Toys* and *TOYS* are grouped as the same value.
Classification property **B** [*1] [*2] (ex: **Brand**) (default value: *empty*)	For each item, the value corresponding to the selected property. (ex: *Coca-Cola*) *Note*: items with empty values are shown in the catalog as (undefined) for this classification property. *Note*: Items with values of different text cases are grouped in the *Database Editor* and Item *catalog*s. Ex: *Lego* and *LEGO* are grouped as the same value.
Classification property **C** [*1] [*2] (ex: **Product line**) (default value: *empty*)	For each item, the value corresponding to the selected property. (ex: *Zero*) *Note*: items with empty values are shown in the catalog as (undefined) for this classification property. *Note*: Items with values of different text cases are grouped in the *Database Editor* and Item *catalog*s. Ex: *skin* and *SKIN* are grouped as the same value.
Name [*2] (default value: *empty*)	The name of the item as it will appear in the catalog. This is usually the actual product name as printed on the product packaging (ex: *Coca-Cola Zero 500ml*). *Note*: For materials, if the value is empty, an initial Name is automatically assigned using the image file name without extension as basis. You can also assign your own Name if you prefer.
Width [*3] [*4] (default value for products and accessories: *10cm/100mm/5in*) (default value for materials: *100cm/1000mm/36in*)	For products and accessories, the physical width of the item in the selected measurement unit (ex: *6*). For materials, this value represents the width of 1 image tile when *Tile* is ON. *Note*: For products and accessories, a value of 0 keeps the original 3D model width. This is useful when you import your own 3D model and you don't know the exact width to type.

Height [*3 *4] (default value for products and accessories: *10cm/100mm/5in*) (default value for materials: 100cm/1000mm/36in)	For products and accessories, the physical height of the item in the selected measurement unit (ex: 20). For materials, this value represents the height of 1 image tile when Tile is ON. *Note*: For products and accessories, a value of 0 keeps the original 3D model height. This is useful when you import your own 3D model and you don't know the exact height to type.
Depth [*3 *4] (default value: *10cm/100mm/5in*)	The physical depth of the item in the selected measurement unit (ex: 6) *Note*: A value of 0 keeps the original 3D model depth. This is useful when you import your own 3D model and you don't know the exact depth to type.
Image1 (default value: *empty*)	For each item, an image can be used to achieve a more realistic look. This property is the filename + extension of the item picture. (ex: 045631.png) *Note*: Pictures are not compulsory. If you don't have a picture, the product will appear as a solid color, white by default, with its name printed on the front if it uses the box shape. See Color below for details on this property. *Note*: The maximum supported size for image files is 5 MB. Note for batch importing: If you type in only the image filename without extension in your Excel file, the importer will try to automatically find your image with the supported extensions in the following order: png, jpg, jpeg, jpe, jfif, bmp, tif, tiff, gif, tga, ico. Please see Guidelines for Images for instructions to prepare your images.
Image2, **Image3**, **Image4**, **Image5**, **Image6** (default values: *empty*)	Some 3D Shapes are designed to support several images for a more realistic look. Image2, Image3 and Image4 work the same way as Image1 described above. See Standard 3D Shapes for the list of shapes supporting two or more images.
Shape (default value: *box*)	The Shape property defines the 3D shape of each item. (ex: cylinder) A set of shapes is provided by the software to cover standard package types. Please refer to Standard 3D Shapes for the description of available shapes. You can also upload your own 3D models to create new custom shapes.
Behavior (product default: *standard*) (accessories default: *panel*)	The Behavior property is specific to PlanogramBuilder. It determines how and where an item will be positioned when dragging it to the bay. Behaviors for products: Please see Product Behaviors for the list of possible values. Behaviors for accessories: Please see Accessory Behaviors for the list of allowed values. *Note*: The Behavior value can be overridden per facing in any planogram: see Item Info.
Collisions (default value: *yes*)	**yes** (checked in GUI): the item will collide with other items. **no** (unchecked in GUI): the item will be able to overlap other items in the planogram. It can be necessary to disable collisions for items that have overhanging parts or are slanted. *Note*: Collisions have no effect if the general collisions parameter in settings is disabled. See Collisions.

Facings Deep (default value: *empty*)	Only applicable to products. By default, the depth of the underlying shelf or the length of the peg determines how many times a product is repeated along the depth axis. You can however override this behavior by specifying a maximum fixed number of items for any product in the database. Example: a value of 3 will force a maximum of 3 items in depth when you drag a product on a shelf, even if the shelf has enough space to fit more items. *Note*: Facings Deep can also be overridden per facing in any planogram: see Change Product Facing Count.
Width gap […] (default value: *empty*)	Only applicable to products. Sets the horizontal gap between products with multiple facings wide. By default, products with multiple facings wide are placed with no gap between each others. You can however override this behavior by specifying in the database a predefined gap between items. *Note*: For products pegged on pegboard type panels, the value entered corresponds to the minimal gap: the product will be placed on the nearest hook guaranteeing this minimal gap. *Note*: The Width gap can also be overridden per facing in any planogram: see Item Info.
Height gap […] (default value: *empty*)	Only applicable to products. Sets the vertical gap between products with multiple facings high. By default, products are stacked along the height axis with no gap between each others. You can however override this behavior by specifying in the database a predefined gap between items. Example: a value of 1 will force a gap of 1 measurement unit (cm or inch) between each repetition of this product in height. *Note*: For products pegged on pegboard or slatwall type panels, the value entered corresponds to the minimal gap: the product will be placed on the nearest hook guaranteeing this minimal gap. *Tip*: This parameter is also very convenient if you want to represent products nested into each others on a pile. In this case, enter a negative value corresponding to the amount of space the product should be nested inside the one below. Ex: enter -3 for a bowl which is nested 3 units inside the bowl below itself. Each bowl on the pile with this reference will also use this value. *Note*: The Height gap can also be overridden per facing in any planogram: see Item Info.
Depth gap […] (default value: *empty*)	Only applicable to products. Sets the depth gap between products with multiple facings deep. By default, products are stacked along the depth axis with no gap between each others. You can however override this behavior by specifying in the database a predefined gap between items. Example: a value of 1 will force a gap of 1 measurement unit (cm or inch) between each repetition of this product along the depth axis. *Tip*: This parameter is convenient if you want to represent products nested into each others in depth. In this case, enter a negative value corresponding to the amount of space the product should be nested inside the one behind it. Ex: enter -1.2 for a plate which is nested 1.2 units inside the plate behind itself. Each plate behind the front one will use this value. *Note*: The Depth gap can also be overridden per facing in any planogram: see Item Info.

Lateral offset […] (default value: *empty*)	Lateral offset (pegged products only) lets you shift products to the left or to the right. This is convenient when the product hanging tab is not centered on the product. Default *empty* value = *0cm* or *0"* value of *0* = the product is centered on the peg hole *positive* values = moves the product right *negative* values = moves the product left *Note*: The offset can be previewed in database Editor if Show Peg Hooks is ON.
Vertical offset […] (default value: *empty*)	Vertical offset (pegged products only) lets you shift products higher or lower by a specified distance. This is convenient to define the position of the hanging hole on a product. default *empty* value = a negative offset of *1cm* or *0.39"* value of *0* = the product top edge is aligned to the peg hole on the back panel *positive* values = moves the product up *negative* values = moves the product down *Note*: The offset can be previewed in database Editor if Show Peg Hooks is ON.
Color (default value: *empty*.) Empty values are treated as if a white color was applied)	The Color property lets you specify a solid color for each item in the database. The color has the following effect on items: The specified color is applied to the areas mentioned in the description of the shape. See descriptions in Standard 3D Shapes. If no image is specified for an item, the specified color is also applied instead of the image. The color is also applied in Schematic view in box & text mode. The color value is specified in the database using the standard HTML color codes (ex: #FF0000 for red). A complete reference of theses HTML color codes is available at http://www.colorpicker.com/ or https://html-color-codes.info/ for example. In Database Editor, the item color can also be picked from a color palette by clicking on the color swatch, or by activating and clicking the color picker tool over the item preview area.

Caption (default value: *empty*)	Applicable to accessories with the Tag behavior only. Enter the text you want to display on the selected Tag item. Allowed values are: **A text string** (ex: *On Sale*) **[br]**: insert a line break **[rp]**: insert this value so the tag automatically displays the retail price (tax incl.) of the product placed closest to the tag. The price value is taken from the spreadsheet imported in Price List. Products with missing prices are labeled *N/A*. **[position]**: display the position of the nearest product. The number helps indentifying the product position and is the same value as in the Project Item List when choosing the Position column. **[reference]**: display the Reference of the nearest product. **[name]**: display the Name of the nearest product. **[custom1]**: display the *Custom Property* 1 of the nearest product. Replace [custom1] by the actual property name you defined in Item Custom Properties. Ex: [Weight] **[custom2], [custom3], [custom4], [custom5] and [custom6]**: same as [custom1] above, to display other custom property values. Any combination of the above values An *empty* value results in no text shown on the tag *Example*: On Sale ! [br] 20% OFF [br] [name] *Note*: Make sure to actually type the square brackets when applicable.
Text height (default value: *empty* = auto-height)	Applicable to accessories with the Tag behavior only. Enter a numeric value to set the selected Tag item caption height. The measurement unit used is the same as selected in Settings. Example: 0.3 *Note*: with an empty Text height or a value of *0*, an automatic allocation of the text height is applied based on the item height.
Text color (default value: *empty* = black)	Applicable to accessories with the Tag behavior only. Enter the color of text captions for the selected Tag item in hexadecimal format (with or without the # prefix, not case-sensitive). *Example*: *#0000FF* results in blue text captions. *Note*: with an *empty* value, text is black.
Custom property **1** [*1] [*2] (ex: *Weight*) (default value: *empty*)	For each item, the value corresponding to the selected property. (ex: *5kg*)
Custom properties **2, 3, 4, 5, 6** [*1] [*2] (default value: *empty*)	Same as *Custom property 1*. For each item, the value corresponding to the selected custom property.
Enabled (default value: *yes*)	**yes** (checked in GUI): the item is available in the product or accessory catalog. **no** (unchecked in GUI): the item exists in the database, but is not available in the product or accessory catalog. This is useful to prevent other users in your company from using some items in planograms, such as for products that are no longer sold but you may want to reactivate later.

Tile (default value: *yes*)	Only applicable to materials. This parameter determines how the material image is applied onto elements: **yes** (checked in GUI): the material image is tiled (repeated) on the element when applied. **no** (unchecked in GUI): the image is stretched to cover the room element when applied.
Type (default value: *product*)	The Type of item: **product** **accessory** **Material** This property can be used to Batch Import Database Items. In Database Editor, it corresponds to the radio button to toggle Products / Accessories / Materials.
Accessory (default value: *0*)	Deprecated: now replaced by the *Type* property, but still supported for backwards compatibility. The Accessory property indicates: 0 = Product 1 = Accessory This property can be used to Batch Import Database Items. In Database Editor, it corresponds to the radio button to toggle Products / Accessories.

Important Note: **If you have set the language of the user interface to a language other than English, the above properties have different names.** Ex: the *Width* property is named *Largeur* in French.

Note *1: Please see Database Setup for details on these properties.

Note *2: Denotes a property where you can use Unicode characters for non-Latin text values.

Note *3: Please see Measurement unit for information on how to select your preferred measurement unit.

Note *4: The direction of *Width*, *Height* and *Depth* is determined by the orientation of the object on the shelf, as shown in the image: *Width* is the left-right dimension, *Height* is the top-bottom dimension, and *Depth* is the front-back dimension. So *Width* is not necessarily the biggest dimension, or *Depth* the smallest dimension.
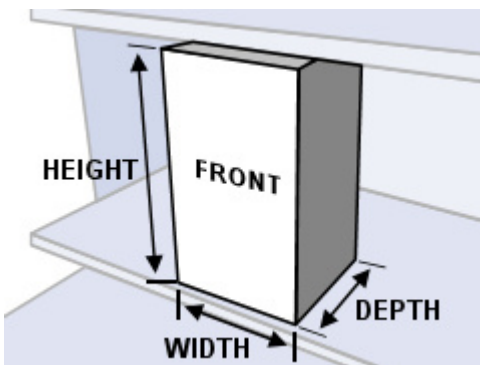
Guidelines for Images

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For each *product* and *accessory*, one or more images can be used to achieve a more realistic representation. You can use existing images or take photos of your product.

Please follow the instructions below to prepare your images:

Choosing the right product view(s)

- For *Image1* (shapes with 1 image), take a picture of the product most representative face (usually the front face).

- For *Image2, Image3, Image4, Image5 and Image6* (shapes with multiple images), take a picture of the product other faces according to the chosen shape as documented in Standard 3D Shapes.

Taking the pictures

- Don't use a flash as it creates bright hotspots on the photo.

- Take the picture straight on, not from an angle.

Using a transparent background

- PlanogramBuilder supports transparent backgrounds in images: the transparent area will be invisible when you place your product or accessory on shelf.

- *Note:* the following image formats support transparency in PlanogramBuilder:

- *png* and *tif* 32 bits with 256 levels of gray for variable transparency (alpha channel).

- *png* and *gif* 8 bits with 1 transparent color.

Note: transparency in PlanogramBuilder only works in combination with specifically designed shapes as listed in Standard 3D Shapes.

Cropping your images

- **Auto-crop:** if your images have a transparent background as explained above, PlanogramBuilder performs an automatic crop to remove the unwanted area surrounding the product. Please note that the auto-crop feature works with any 3D shape, even with shapes that don't support transparency.

- **Manual crop:** images that don't have a transparent background should be cropped manually to the outer limits of your product (i.e. the image must be cropped so that the outline of the product touches the 4 edges of the image as much as possible). Please see the image examples below.

Image formats and resolution

- Save the picture in a supported format: *jpg*, *png*, *bmp*, *gif* or *tif*. (use only *gif*, *tif* or *png* for transparency support)

- Each picture file must be smaller than 5 MB for PlanogramBuilder. Otherwise it won't be uploaded.

- Images are automatically downsized by PlanogramBuilder if larger than 786'432 pixels (=1024x768 or 500x1573 for example). Uploading images larger than this will not provide better quality.

- Make sure the image size is just large enough to distinguish the desired detail. Typically you want to be able to read the text on the product or packaging.

Batch importing products with images

- If you intend to use the Batch Import feature, make sure you save your images in the same folder as your products *.txt list file, or in one of its child folders.

- If you type in only the image filename without extension in your Excel file, the importer will try to automatically find your image with the supported extensions in the following order: *png, jpg, jpeg, jpe, jfif, bmp, tif, tiff, gif, tga, ico*.

- Please see Batch Import Database Items for detailed instructions.

Please look at the examples of good and bad pictures below. The dotted lines represent the edges of each image:

bad picture

bad picture

good picture

good picture

good picture

Product Behaviors

Four types of *products* can be created with PlanogramBuilder, each of them corresponding to a specific value for the database *Behavior* field. Here are the possible values, descriptions and images showing example products for each *Behavior* value:
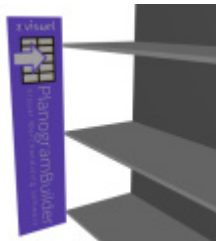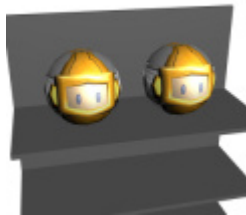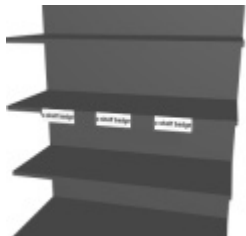
Behavior value	Description	Example
standard (default value)	A standard product. It sits on shelves and fills the shelf depth with facings by default. (ex: a bottle of soda)	
stackable	This is the same as standard products except it can be stacked onto different products which also have the stackable behavior. Use this behavior for all products which must often be stacked on or below different products. *Note*: a stacked product is centered laterally on the product below, so it is best suited for stacking different products of the same width. Do not use this behavior if you want to create vertical piles of the same product. In this case see instead Change Product Facing Count. *Exception*: if you have created project with products stacked as separate items, keep the stacked behavior for your products (typically projects saved before October 2019).	
tester	A tester product. It sits on shelves, but only one product is placed at the front edge of the shelf. You can place standard products behind it. (ex: a perfume tester, which will be placed in front the packaged perfumes)	
pegged	A pegged product. It hangs on pegs and is repeated along the length of the peg. (see Creating New Bays and Back Panel for help on defining peg length.) (ex: blister packs)	
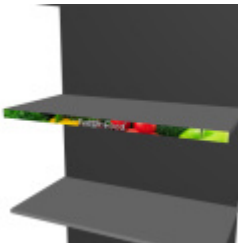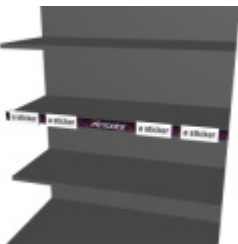
Note: Even if you choose a language other than English for the user interface, the names of the behaviors remain as listed above.

Accessory Behaviors

Several types of *accessories* can be created with PlanogramBuilder, each corresponding to a specific value for the database *Behavior* field. Here are the possible values, descriptions and example images showing sample *accessories* for each *Behavior* value (listed alphabetically):

Behavior value	Description	Example
bay header	A accessory which snaps to the top of any back panel. *Note*: if the bay has no back panel, you cannot place a bay header. In this case we suggest creating a small back panel as a crossbar to support your desired bay header. Use this to place header panels above your back panels.	
divider	A accessory which automatically snaps to the front edge of a shelf. Use this to create lateral bay divider signs for example. *Tip:* the *box_sides* shape is well suited to this type of objects.	
ondisplay	An object which can be placed on any shelf without being duplicated in depth. Please note that this is typically applied to custom products displayed out-of-box (on-display).	
panel **(default value)**	A accessory which snaps onto the back of any bay. *Note*: if the bay has no back panel, the header can be positioned between the lowest and highest shelves. Use this to create posters, back cards or any other hanging POS.	
presenter	A accessory which is placed on the shelf and onto which you can place an *ondisplay* accessory. Use this to create stands to present out-of-box products. *Note*: An ondisplay placed on a presenter always sits at the same height as the shelf. So this accessory is only suitable for stands which have a very thin platform for placing an out-of-box.	
Shelf badge	A accessory which snaps to the front edge of any shelf at 3 possible predefined positions: left, center, right. Use this to create shelf cards / shelf badges.	

Shelf strip	A accessory which snaps onto the front edge of any shelf. It is horizontally centered and aligned to the top of the shelf. Use this to create single shelf strips.	
sticker	A accessory which snaps to the front of a shelf or shelf strip at any lateral position. Use this to create cards, typically used to show information or specials.	
tag	A box which can be placed on the front edge of a shelf to display as a label for the actual product name, pricing or other text (no image). Tags have dedicated parameters: **Caption** **Text height** **Text color** See details for each above parameter in the Database Item Properties.	
shape defined	This is a special behavior to use only if you have been instructed to.	

Note: Even if you choose a language other than English for the user interface, the names of the behaviors remain as listed above.

Standard 3D Shapes

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Video tutorial on this topic: 6: Adding products of various shapes to the database

PlanogramBuilder comes with the following set of basic shapes to cover standard package types. You can specify any of the shapes below in the Shape field for each item.

Shapes with 1 image

(See *Image* property in the Database Item Properties)

The list below is sorted alphabetically except the default box shape:

Shape name	Shape illustration	Result with product image	Description

box **(default value)**			A box with 1 image fitted to all 6 sides. *Note*: If you don't specify a shape, the box shape is used by default.
Box_rounded			A box with rounded edges and 1 image fitted to all 6 sides.
bottle_soda_large			A large soda bottle (ex: 2 liters) with 1 image fitted to front and back.
bottle_soda_small			A small soda bottle (ex: 0.5 l) with 1 image fitted to front and back.
bottle_square			A bottle with 4 flat sides with 1 image fitted to front and back.
bottle_tapered			A bottle with tapered top with 1 image fitted to front and back.
bottle_wine			A typical wine bottle with 1 image fitted to front and back.

box_front			A box with 1 image fitted to the front face only. The other faces will use the specified Color*. Use this when you don't want the sides to show the front image, such as for shelf strips or headers.
box_sides			A box with 1 image fitted to the left and right faces only. The other faces will use the specified Color*. Use this when you want only the side faces to show the image, such as for dividers (accessories).
box_top			A box with 1 image fitted to the top face only. The other faces will use the specified Color*. Use this when you want only the top face to show the image.
can_drink			A typical cylindrical drink can with a metal lid and 1 image fitted to front and back.
can_drink_slim			A typical cylindrical drink can with a metal lid and 1 image fitted to front and back.
can_food_cylindrical			A typical cylindrical food can with a metal lid and 1 image fitted to front and back.
chocolate_bar			A typical chocolate bar shape with 1 image fitted to front and back.

cylinder			A cylinder with 1 image fitted to front, back, top and bottom.
cylinder_front_back			A cylinder with 1 image fitted to front and back only. The top and bottom will use the specified Color*. Tip: This can be used for containers when you don't want the front image applied to the lid for example.
cylinder_top			A cylinder with 1 image fitted to top and bottom. The other faces will use the specified Color*. *Tip*: This can be used for plates or containers when the top picture is more representative.
plane_lying			A horizontal plane with 1 image fitted to top and bottom. It has no visible thickness but the specified height is still accounted for to stack items in planograms. You can use this for items not resembling any of the other provided 3D shapes.
plane_standing			A vertical plane with 1 image fitted to front and back. It has no visible thickness but the specified depth is still accounted for to space items in planograms. You can also use this for items not resembling any of the other provided 3D shapes.
pouch_lying			A soft pouch placed horizontally with 1 image fitted to top and bottom.
pouch_standing			A soft pouch placed vertically with 1 image fitted to front, back and bottom.

sphere			A sphere / ovoid shape with 1 image fitted to front and back.
tube			A tube with 1 image fitted to front and back. Use for toothpaste, cream and similar items.

Shapes with 1 image and transparency

(See *Image1* property in Guidelines for Images)

Tip: All shapes supporting transparency are prefixed with the term "*alpha*".

The list below is sorted alphabetically:

Shape name	Shape illustration	Result with product image	Description
alpha_cloth_lying			A shape well suited for clothing laying flat, with the image fitted to top and bottom.
alpha_cloth_standing_front			A shape well suited for clothing hanging facing front with the image fitted to front and back.
alpha_cloth_standing_sideways			A shape well suited for clothing hanging facing sideways with the image fitted to left and right side.
alpha_plane_lying			A horizontal plane with the image fitted to top and bottom. It has no visible thickness but the specified height is still accounted for to stack items in planograms. You can use this for items laying flat and not resembling any of the other provided 3D shapes.
alpha_plane_standing			A vertical plane with the image fitted to front and back. It has no visible thickness but the specified depth is still accounted for to space items in planograms. You can also use this for items facing front and not resembling any of the other provided 3D shapes.

Shapes with 2 images

(See *Image1* and *Image2* properties in the Database Item Properties)

The list below is sorted alphabetically:

Shape name	Result with product images	Description
bag_lying - 2 pics - 1 front - 2 top bottom		A bag with 2 images: Image1 fitted to front face Image2 fitted to top & bottom faces.
box 2pics - 1 front - 2 other faces		A box with 2 images: Image1 fitted to front face Image2 fitted to all other faces.
box 2pics - 1 left - 2 other faces		A box with 2 images: Image1 fitted to left face Image2 fitted to all other faces.
box 2pics - 1 right - 2 other faces		A box with 2 images: Image1 fitted to right face Image2 fitted to all other faces.
box 2pics - 1 top - 2 other faces		A box with 2 images: Image1 fitted to top face Image2 fitted to all other faces.
cylinder - 2 pics - 1 front back - 2 top		A cylinder with 2 images: Image1 fitted to front & back faces Image2 fitted to top face.

cylinder_lying - 2 pics - 1 front - 2 top bottom		A cylinder with 2 images: Image1 fitted to front face Image2 fitted to top & bottom faces.

Shapes with 2 images and transparency

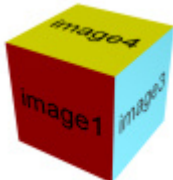(See *Image1* and *Image2* properties in the Database Item Properties)

Tip: All shapes supporting transparency are prefixed with the term "*alpha*".

Shape name	Result with product images	Description
alpha_plane_standing_sideways - 2 pics - 1 left - 2 right		2 vertical planes with 2 images: Image1 fitted to left face Image2 fitted to right face. It has no edges along its thickness but the specified width is still accounted for in planograms. You can use this for dividers or side panels which don't have a rectangular shape.

Shapes with 4 images

(See *Image1, Image2, Image3 and Image4* properties in the Database Item Properties)

The list below is sorted alphabetically:

Shape name	Result with product images	Description
box 4pics - 1 front - 2 left - 3 right - 4 top		A box with 4 images: Image1 fitted to front face Image2 fitted to left face Image3 fitted to right face Image4 fitted to top face.

Shapes with 6 images

(See *Image1, Image2, Image3, Image4, Image5 and Image6* properties in the Database Item Properties)

The list below is sorted alphabetically:

Shape name	Result with product images	Description

Shape name	Result with product images	Description
box 6pics - 1 front - 2 left - 3 right - 4 top - 5 back - 6 bottom		A box with 4 images: `Image1` fitted to front face `Image2` fitted to left face `Image3` fitted to right face `Image4` fitted to top face *Image5* fitted to back face *Image6* fitted to bottom face.

Notes for all 3D shapes

- Each of the above shapes is resized in width, depth and height to match exactly your item overall dimensions.

- In Database Editor, only the available *Image[n]* fields are enabled depending on the assigned shape. For example, assigning the *box* shape only enables the *Image1* field.

- If you have specified image(s), it (they) will be resized to fit onto the selected shape.

- For shapes with area(s) using *Color*, the color is white by default but can be specified for per database item. See the Database Item Properties for details on the Color property. If you don't apply image(s), the image(s) areas will be colored with the specified Color value.

- If you leave the Shape field blank, PlanogramBuilder will create your item using the shape "*box*".

- If you can't read the entire assigned shape name in the collapsed drop-down list, you can display it in a tooltip by hovering your mouse pointer over the *Shape* label.

- If you need a different 3D shape not listed above, you can either use your own 3D models (see Custom 3D Shapes) or contact zVisuel to order a new 3D shape. We will give you a quote for creating the shape based on your description.

- Even if you choose a language other than English for the user interface, the names of the 3D shapes remain as listed above.

Custom 3D Shapes

If you need additional 3D shapes not listed in Standard 3D Shapes, you can add new shapes by importing your own 3D models.

The supported 3D model file format is **.3DS* (Autodesk 3D Studio original DOS format).

In PlanogramBuilder, *3D shapes* are basically 3D models with only their geometric mesh. The idea is to be able to re-use a 3D shape to generate several products or accessories by just changing the image(s) applied as texture and the dimensions of the item. PlanogramBuilder allows specifying directly in Database Editor the image(s) that will be applied to each product or accessory in the dedicated properties named **Image1**, **Image2**, **Image3** and **Image4** (see Database Item Properties and Guidelines for Images).

Note: The guide below explains how to prepare your 3D models with *Autodesk 3ds Max*, however these guidelines should also apply to any 3D modeling software, as long as it can save **.3DS* files:

Create a 3D Model

Material names convention: your 3D models must have specific materials assigned; each material must be named using the following naming scheme:

- **Image1**: if you name a material *Image1* in your 3D model, any part of the 3D model with this material will be interpreted by PlanogramBuilder so that when the user specifies a file for the *Image1* property in the database, the image will be applied (mapped) onto this area of the model. **Image2, Image3, Image4** material names can also be defined in your 3D model using the same principle, each corresponding to its respective database *imageN* property.

Note: *Image1*, *Image2*, *Image3* and *Image4* materials can only use maps in the *diffuse* slot. In PlanogramBuilder, these images can represent the *diffuse* color and optionally the *alpha transparency*.

Note: if you 3D model is designed to use images with *alpha transparency*, you must name the exported **.3DS* file with the prefix "**alpha_**". Ex: "*alpha_mySHape.3ds*". When you use such shapes in the PlanogramBuilder database, you must also make sure to apply images with 32bit depth as explained in Guidelines for Images.

Note: other map types such as *bump* or *reflections* are not supported by PlanogramBuilder for the *imageN* materials.

Note: **UVW Mapping** for the diffuse maps in the 3D model must be applied to your geometry to match the result you want to achieve. You can apply *tiling* values in the *UVW Mapping* modifier. However do not apply *tiling* or *offset* in the *material map* setting as this is not supported by the 3DS format.

- **color**: a material with the name *color* can be used to represent a solid color. In PlanogramBuilder, the actual color can be specified by the user in the *color* property.

Note: No image map is taken into account by PlanogramBuilder for the *color* material.

- **plano_keep**…: your 3D models can also contain materials which will be imported as is by PlanogramBuilder, materials that the user will not be able to change in Database Editor. To define such materials, you must name the materials in *3ds Max* with the prefix *plano_keep* (example of such material name: *plano_keep glass*).

Note: The only image map allowed in a *plano_keep*… material is a special environmental *reflection* map image named refmap.png (click to download). You can use this special map within any *plano_keep*… material if you wish to achieve reflective surfaces such as glass. You don't need to upload the *refmap.png* image since it is already available on our servers.

Material types: use only *3ds Max Standard* or *Multi/Sub-object* materials with *Blinn* or *Phong* shading. *Architectural* materials or *procedural* shaders are not supported.

Material opacity: opacity / transparency values are supported for all materials. PlanogramBuilder uses additive transparency so make sure to set your material to use this system to preview your material accurately before exporting the 3DS file.

Measurement unit: the system units in 3ds Max should be in **cm**, as is used by PlanogramBuilder. If your model is in another measurement unit, convert it to cm.

Orientation: make sure your model is oriented in such a way that its top is facing upwards and it front is facing front, as you would like it to appear in a planogram.

Geometry:

- Keep to a reasonable number of polygons as the 3D files will be used for real-time rendering. You can apply an *Optimize* or *MultiRes* modifier on the models to reduce the number of polygons.

- Make sure to have clean models with welded vertices and no duplicated faces. In *3ds Max*, the *STL check* modifier check can be used to check model integrity.

Animation:

- PlanogramBuilder doesn't support animation so you must remove all animation keys before exporting the 3DS file.

Save a 3D Model

1. In 3ds Max, **select only the items to export**:

   o Geometries

   o Dummies if they are used

   o Other types of items should not be selected: lights, cameras, 2D shapes, other gizmos.

2. In the **File** Menu, click **Export Selected**.

3. In the **Select File to Export** dialog, select the type **3D Studio (*.3DS)**.

4. Type a name for the 3DS file. You can use long names up to 50 characters for the 3DS model. The file name will become the name of the item in PlanogramBuilder, so make sure to think about the desired correct name, especially since each shape must have a unique name.

Warning: **do not save a 3D model named exactly as an existing standard PlanogramBuilder shape such as "box", because this would overwrite the existing box shape in PlanogramBuilder.**

5. Check **Preserve Max's Texture Coordinates** in the options dialog.

To check if the 3DS file exported correctly, you can re-import the 3DS file in an empty *3ds Max* document. All materials and geometries should still look as defined.

Tip: You can download our sample 3D model *steak-fries & drink.3ds* and the accompanying images which illustrates the above instructions. Just unzip it to your computer to access all the files provided. We also use this sample model in the next section to explain how to import it into PlanogramBuilder.

Import a 3D Model

To import a new shape, you can either assign it to a new item or to an existing item. Please see Add Database Item or Modify Database Item for details on these tasks.

In the instructions below, we create a new item using our sample 3D model ***steak-fries & drink.3ds* for the shape to import.**

1. In the **Database**, create a new item or select the existing item to display it in the **Item Details** view.

2. In the **Item Details** view, next to **Shape**, click on **Browse**.
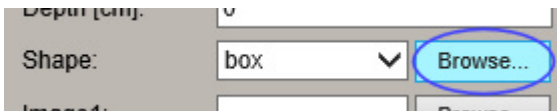
3. **Select** the **.3DS* file on your computer and click **Open**.
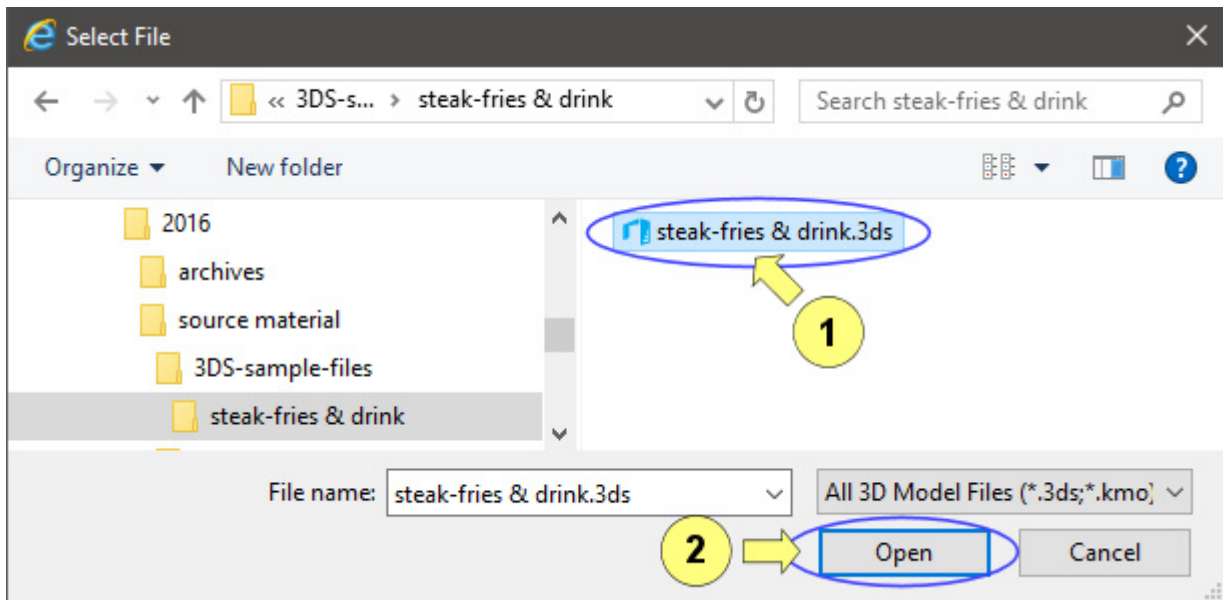
4. After the 3DS file has been uploaded, it appears in the PlanogramBuilder list of shapes.

5. You can specify the **Width**, **Depth** and **Height** of the item as usual, but you can also enter *0* for any dimension if you just wish the item to use the actual respective dimension of the 3D model you imported.

6. You can now also assign images (**Image1**, **Image2**, etc. as planned in your 3D model) and a **Color** value to your item. In our example, *Image1* is for the steak, *Image2* for the fries and *Image3* for the liquid in the glass.

7. Once you are happy with all values, click on **Create** or **Update** at the bottom of the **Item Details** view.

8. Below is an example of the product created with our sample 3D model:

Note: If you want to make changes to a shape after importing it, just import it again into PlanogramBuilder after making the desired changes in your 3D modeling software. The shape will be overwritten with the updated one.

Note: After uploading a shape, you can reuse it for any number of items in the database. You don't have to import the 3D model again as it is already in the list of available shapes.

9. Now try to create another item using the same shape, but:

10. Name the item it ***steak-fries & apple juice***

11. Change the **Color** property to #232323 or pick a dark grey color in the color palette: this will make the plate dark gray.

12. Replace **Image3** with the provided image named ***apple juice.png***. This will change the drink to apple juice.

13. Here is the result below:

Item Details

Reference:	6541287457
Enabled:	☑
A Category:	Food
B Brand:	BestBuffet
C Product Line:	Hot Meals
Name:	steak-fries & apple juice
1 Custom 1:	
2 Custom 2:	
3 Custom 3:	
Behavior:	standard ⌄
Collisions:	☑
Units per facing:	
Depth gap [cm]:	0

Width [cm]:	0	
Height [cm]:	0	
Depth [cm]:	0	
Shape:	steak-fries & ⌄	Browse...
Image1:	steak.png	Browse...
Image2:	fries.png	Browse...
Image3:	apple juice.png	Browse...
Image4:		Browse...
Image5:		Browse...
Image6:		Browse...
Color:	#232323	🖊

Item Preview

Update   Cancel   Delete

Local data

The *Local Product Data* task allows you to complement your PlanogramBuilder data with additional data linked to your products, but not saved in the database, such as pricing and sales figures.

Because this type of data can vary depending on the targeted region or period, each PlanogramBuilder user in your company can load distinct data that remain on the user's PC. This is in contrast to the database content which is shared between all users in your company and is kept on zVisuel servers.

Price List

Local Data > **Price list file**

A price list file can be imported from Excel to attach prices to your products.

The prices can then be used to calculate and display various figures on screen and in reports.

For example, they can be used by the Assortment Analysis and the Project Analysis.
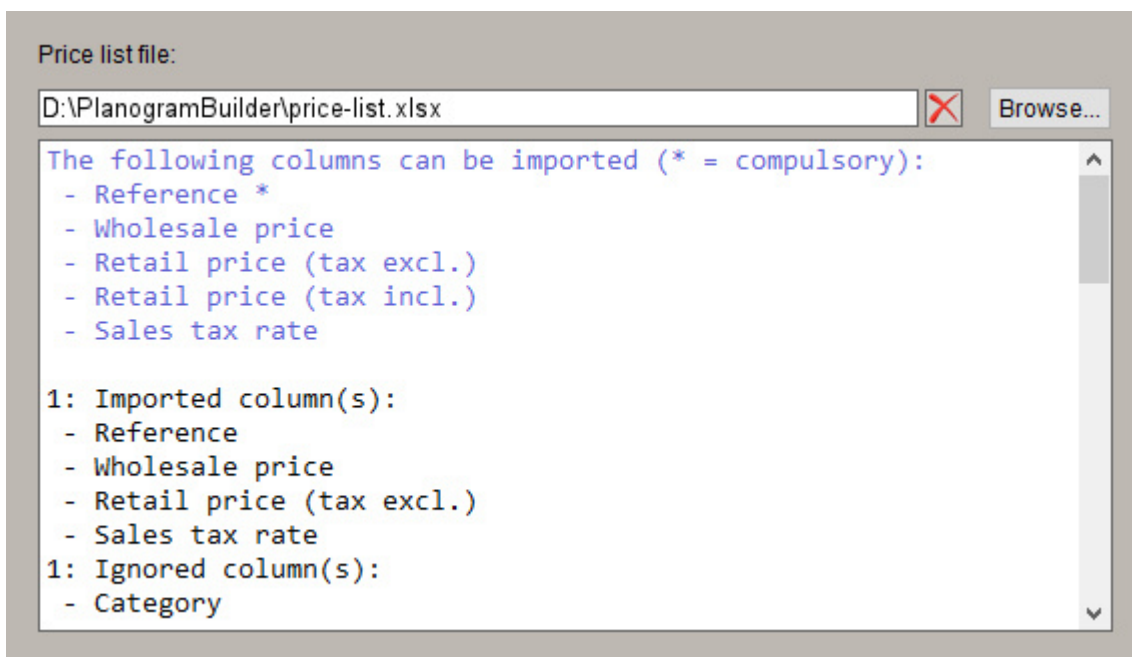
Tip: you my have several price list files for the same products. Just load the one corresponding to your current Planogram targeted retailers.

Price List Screen

File selection

File text box: this shows the path and name of the currently loaded price list file.

Clear: click on this button to clear the current file from the text box.

Browse: click on this button to select your price list file on your PC.

Note: the file path persists over PlanogramBuilder sessions.

Note: PlanogramBuilder provides an automatic reload of the local data files. This is useful since can keep the Excel application opened to edit your local data, save changes in Excel with Ctrl-S and enjoy immediate feedback in PlanogramBuilder.

Note: the imported values remain in memory and are not uploaded to our servers.

Import Log

This area shows the following information:

- In **blue** text, to help you prepare your input spreadsheet: list of supported columns
- In **black** text, once you've imported a file: list of imported and ignored columns.
- In **red** text, once you've imported a file: list of errors

Tip: you can select and copy text from the import log.

Tip: you can zoom in/out in the log window using *Ctrl + mouse wheel*. The default zoom level is reset on task switch.

Price List Preparation

Import Project Templates Room Create Bay Modify Bay Products Shelf Tools Item Info Publish Analysis Local Data Database

Your prices must be in the form of a table and saved as a *Microsoft Excel* file *(*.xlsx, *.xls)*. You can include pricing for any product that is referenced in your PlanogramBuilder database, even disabled products.

Supported columns

The imported table can contain the following columns with the exact column headers listed below and values per item on each line:

Reference

(compulsory) The product references for which you want to list a price.

References with no match in your database are disregarded.

Wholesale price

(optional) The item buying price, without currency symbol

Retail price (tax excl.)

(optional) The item selling price, before tax, without currency symbol

Retail price (tax incl.)

(optional) The item selling price, tax-included, without currency symbol

Sales tax rate

(optional) The sales tax in percentage.

Important note: If you have set PlanogramBuilder to a language other than English, the supported column header names are different. Please find and copy the supported headers from the *import log text box*, shown as blue text under "The following columns can be imported".

Note: the column header names are not case sensitive. You can use any mix of lower and upper case header names.

Note: If some columns and/or values are missing, PlanogramBuilder won't be able to display or calculate related figures for these.

Tip: You only need to provide 2 of the 3 following columns:

- *Retail price (tax excl.)*
- *Retail price (tax incl.)*
- *Sales tax rate*

PlanogramBuilder will derive the missing 3rd column values. *Example*: if your file contains *Retail price (tax excl.)* and *Sales tax rate*, the *Retail price (tax incl.)* will be automatically calculated.

Note: If you have additional columns, they won't hurt and will be ignored for the pricing information (like 'BRAND', 'PRODUCT LINE' and 'NAME' for example). So you can for example use the same file for your product database and product pricing.

Example

Reference	Wholesale price	Retail price (tax excl.)	Sales tax rate
zv-0000000001	1.20	1.50	19.00%
zv-0000000002	1.09	1.55	19.00%
zv-0000000003	1.35	2.45	19.00%
zv-0000000004	1.43	2.55	19.00%
zv-0000000005	1.68	2.40	19.00%
zv-0000000006	0.65	0.90	19.00%
zv-0000000007	0.46	0.65	19.00%
zv-0000000008	0.88	1.60	19.00%
zv-0000000009	1.18	2.10	19.00%
zv-0000000010	0.67	0.95	19.00%
zv-0000000011	3.24	3.95	19.00%
zv-0000000012	2.03	2.90	19.00%
zv-0000000013	0.33	0.60	19.00%
zv-0000000017	1.74	3.10	19.00%
zv-0000000018	2.31	3.30	19.00%
zv-0000000019	2.84	3.95	19.00%
zv-0000000020	8.19	11.70	19.00%
zv-0000000021	2.48	4.50	19.00%
zv-0000000022	1.57	2.80	19.00%
zv-0000000023	1.12	1.60	19.00%

Example of Excel price list

To get an example of a valid price list, you can also download the following file containing prices for the sample products in PlanogramBuilder:
https://planogrambuilder.com/downloads/sample%20files/sample%20price%20list.xlsx

Sales Figures

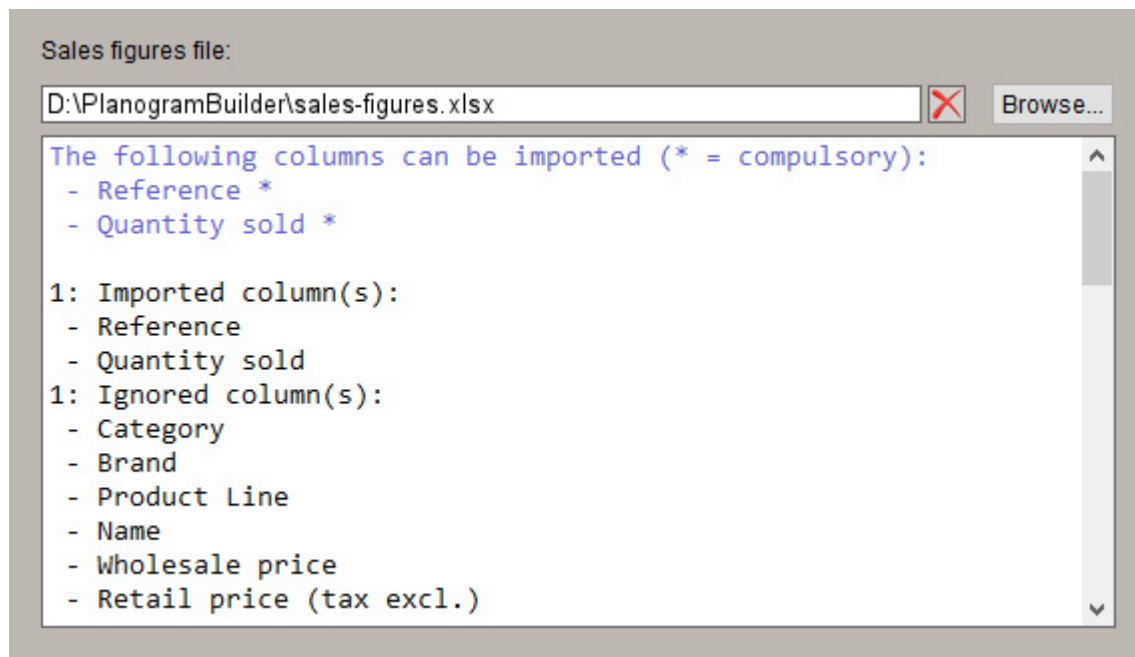| Import Project | Templates | Room | Create Bay | Modify Bay | Products | Shelf Tools | Item Info | Publish | Analysis | Local Data | Database |

Local Data > Sales figures file

A file with your sales statistics can be imported from Excel to attach sales figures to your products.

The sales numbers can then be used to calculate and display various metrics on screen and in reports.

For example, they can be used by the Assortment Analysis and the Project Analysis.

Tip: you my have several sales figures files for the same products. Just load the one corresponding to your current Planogram project.

Sales Figures Screen

File selection

File text box: this shows the path and name of the currently loaded sales figures file.

Clear: click on this button to clear the current file from the text box.

Browse: click on this button to select your sales figures file on your PC.

Note: the file path persists over PlanogramBuilder sessions.

Note: PlanogramBuilder provides an automatic reload of the local data files. This is useful since can keep the Excel application opened to edit your local data, save changes in Excel with Ctrl-S and enjoy immediate feedback in PlanogramBuilder.

Import Log

This area shows the following information:

- In **blue** text, to help you prepare your input spreadsheet: list of supported columns
- In **black** text, once you've imported a file: list of imported and ignored columns.
- In **red** text, once you've imported a file: list of errors

Note: the imported values remain in memory and are not uploaded to our servers.

Tip: you can select and copy text from the import log.

Tip: you can zoom in/out in the log window using *Ctrl + mouse wheel*. The default zoom level is reset on task switch.

Sales Figures Preparation

Import Project Templates Room Create Bay Modify Bay Products Shelf Tools Item Info Publish Analysis **Local Data** Database

Your sales figures must be in the form of a table and saved as a *Microsoft Excel* file *(*.xlsx, *.xls)*. You can include sales figures for any product that is referenced in your PlanogramBuilder database, even disabled products.

Supported columns

The imported table can contain the following columns with the exact column headers listed below and values per item on each line:

Reference

(compulsory) The product references for which you want to list sales statistics.

References with no match in your database are disregarded.

Quantity sold

(compulsory) The number of units sold for each product.

Important note: If you have set PlanogramBuilder to a language other than English, the supported column header names are different. Please find and copy the supported headers from the *import log text box*, shown as blue text under "The following columns can be imported".

Note: the column header names are not case sensitive. You can use any mix of lower and upper case header names.

Note: If some columns and/or values are missing, PlanogramBuilder won't be able to display or calculate related figures for these.

Note: If you have additional columns, they won't hurt and will be ignored for the sales figures (like 'BRAND', 'PRODUCT LINE' and 'NAME' for example). So you can for example use the same file for your product database, product pricing and sales figures.

Example

Reference	Quantity sold
zv-0000000001	125
zv-0000000002	74
zv-0000000003	160
zv-0000000004	123
zv-0000000005	62
zv-0000000006	36
zv-0000000007	44
zv-0000000008	74
zv-0000000009	38
zv-0000000010	24
zv-0000000011	18
zv-0000000012	36
zv-0000000013	22
zv-0000000017	35
zv-0000000018	27
zv-0000000019	14
zv-0000000020	11
zv-0000000021	19
zv-0000000022	8
zv-0000000023	17

To get an example of valid sales figures, you can also download the following file containing sales figures for the sample products in PlanogramBuilder:
https://planogrambuilder.com/downloads/sample%20files/sample%20sales%20figures.xlsx

Projects

Projects are planograms created and saved in PlanogramBuilder native format. They can be opened and edited only in PlanogramBuilder.

Your planogram projects are stored on our remote servers. This lets you log in to PlanogramBuilder from any computer and always access all your projects.

In this section we explain how to open, save, merge, share and manage your planogram projects.

New Project

1. Click on the **New** command in the upper left corner of the work screen.

2. After clicking **New**, you will have an empty project.

3. The **Templates** task will be automatically activated if you have previously created one or more template(s), so that you can start dragging templates to your new project (See Template Catalog). If you have not previously saved any template or if the **Create Bay** task is currently active, this task will be active so that you can start adding new bays. (See Create Bay.)

Tip: this command is also available in the **Project menu** and **Context menu > Project**.

Save Project

To save the same project again after further editing, simply click the **Save** command.

Tip: You can see if your current project has been modified since it was last saved by the asterisk (*) symbol appended to the project name on the upper toolbar.
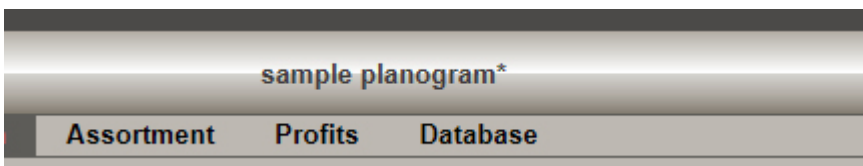
Tip: this command is also available in the **Project menu** and **Context menu > Project**.

Save Project As

To save your current project for future access:

1. If you are working on a new project, click the **Save As** button.

2. Type a name for the project in the **Name** edit box and optionally a comment (such as your client's name) in the **Comment** field.

Name:	sample planogram
Comment:	zVisuel

3. Click the **Save** button on the bottom toolbar or press the **Enter** key on your keyboard.

4. When the operation is complete, you will see a confirmation message in the bottom toolbar. The project automatically becomes available in the list of projects.

Once the current project has been saved, its name appears in the top of the work screen (as shown in the Screen Layout picture).

Tip: this command is also available in the **Project menu** and **Context menu > Project**.

Project List

The project list is displayed when you click on Open Project or Manage Projects. It lets you view and select all your saved projects.

Tip: the project list also opens if you click on **Open** or **Manage** in the **Project menu** or in the **Context menu > Project**.

Select Project

To select a project, click on its line in the list.

Use the Up/Down arrow keys to switch to the previous/next project.

A maximum of 50 projects is shown on each page. If there are more than 50 projects, they are displayed on additional pages. To select another page to display, use the page navigation tools in the lower left corner of the panel:

- Display a page by clicking on one of the 10 visible page numbers.
- Display the previous/next page by clicking on the left/right arrow (shortcut key: Left/ Right Arrow).
- Display the previous/next page set by clicking on the left/right 3 dots.

Note: If your screen is small, scroll down to see more items.

Sort Projects

Click on the headers at the top of each column to sort the projects according to the column content.

For example, to order the list by project names, click on the **Name** header. To order it by most recent modification dates, click on **Date Modified**.

When you click again on a header, the order is reversed.

Note: The last-used sort criteria and sort direction persist for your next session.

Filter Projects

You can also use **Search Filters** to display only projects matching specific criteria. All the text filters accept single or multiple keywords following these rules:

- Multiple keywords must be separated by spaces
- All keywords must be present
- Keywords are not case sensitive
- The order of keywords doesn't matter

Example: typing *Special campaign* in the **Name** Search filter box will display all the projects containing *Special* AND *campaign* in their name.

To clear a text filter, click on the relevant **Clear** button (red cross). To clear a drop-down filter, select the **asterisk** in the list.

Note: The Owner column and filter are only visible to users with shared projects enabled (see Sharing All Projects).

Tip: You can switch the selected project in the list to the one above or below with the **Up** and **Down arrow key** on your keyboard.

Tip: You can use the **Enter** key to open the selected project.

Open Project

1. Click the **Open** or **Manage** button on the upper toolbar. It will open a dialog with a list of your projects. (See Project List.) This command is also available in the **Project menu** and **Context menu > Project**.

---

2. **Double-click** a project to open it. Alternately, you can:

3. **Select** a project in the list.

4. Press **Open** on the bottom toolbar (shortcut key: **Enter**).

5. You will be prompted to save unsaved work if any.

6. Your project will appear in the viewing area.

Add Project (Merge)

You can also combine a previously saved project with the currently opened project:

1. Click the **Open** or **Manage** button on the upper toolbar. It will open a dialog with a list of your projects. (See Project List.)

2. Select a project in the list.

3. Click on the **Add** button on the bottom toolbar.

4. The bays and the content of the added project are automatically merged into the currently opened project. They are initially placed to the right of the existing bays but you can move them easily afterwards with the **Edit Bay** tool. (See Move Bays below.)

Note: If your current project has Free bays OFF and you merge a Free bays project, Free bays will automatically be turned ON for the current project to allow positionning the merged bays correctly. See Free Bays (Bay Placement Mode).

Manage Projects

The **Manage** button gives you access to the project list with functions such as deleting projects or changing project properties.

Tip: this command is also available in the **Project menu** and **Context menu > Project**.

Delete Project

1. Click on the **Manage** button. It will open a dialog with a list of your projects. (See Project List.)

2. Select the project in the list.

3. Click on the **Delete** button.

4. Click **OK** in the confirmation dialog.

Note: it is not possible to retrieve a project once deleted.

PlanogramBuilder features local backup and restore capabilities for your Projects.

We advise performing regular backups so you can always retrieve projects in the event of accidental changes or deletion.

Change Project Properties

This section explains how to rename, classify and mark projects as locked.

Project Name

The Project name lets you edit the name of each planogram project.

1. Click on the **Manage** button. It will open a dialog with a list of your projects. (See Project List.)

2. Select the project to rename in the list.

3. Edit the **Name** of the selected project in the edit boxes on the right of the screen.

4. Click on the **Update** button to apply your changes.

Project Comment

The Project comment lets you enter or edit a descriptive comment for each planogram project.

1. Click on the **Manage** button. It will open a dialog with a list of your projects. (See Project List.)

2. Select the desired project in the list.

3. Edit the **Comment** of the selected project in the edit boxes on the right of the screen.

| Name: | sample planogram |
| Comment: | zVisuel |

4. Click on the **Update** button to apply your changes.

Project Locked Status

Any project can be marked as *Locked* to prevent modifying the project after it has been finalized.

To set a project as *Locked*, follow these steps:

1. Click on the **Manage** button. It will open a dialog with a list of your projects. (See Project List.)

2. Select a project in the list.

3. Check the **Locked** checkbox on the right of the screen under Project properties.

4. Press the **Update** button on the toolbar to apply your changes.

After marking a project as *Locked*:

- A checkmark is added under the *Locked* column in Project List, in Manage Projects and Open Project, to the right of Date Modified.

- *The Save* command is disabled for this project. It can still be opened, edited and saved as, but modifications cannot be saved over the existing project.

- Nobody can delete any project that is marked as locked.

Upon un-checking the Locked checkbox it becomes possible to save or delete the project.

Note: If a PlanogramBuilder administrator activated the option *Shared Projects* (Share All Projects), only an administrator is able to uncheck the *Locked* box of any project marked as locked. Even if you were the original user who set the project as locked, as a standard user you won't be allowed to un-publish it.

Project Classification

1. Click on the **Manage** button. It will open a dialog with a list of your projects. (See Project List.)

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2. Select the project to classify in the list.

3. Edit the value(s) of the selected project in the edit boxes on the right of the screen.

4. Click on the **Update** button to apply your changes.

Tip: If it's a Template your project classification is also reflected in the Template catalog. This lets you organize your templates so users can browse them easily.

Share Projects

Several features let you Template Projects and/or share projects with other PlanogramBuilder users in your company:

- Send a Project Copy
- Template Projects and use the Template Catalog
- Share All Projects

The above features allow sharing planograms for further editing as explained in the sections below.

Note: Of course you can also output finished planogram pictures and reports for people who don't have PlanogramBuilder. In this case see Publish.

Send a Project Copy

To send a copy of one of your projects to one or several other PlanogramBuilder user(s) in your company, follow theses steps:

1. Click on the **Manage** button. It will open a dialog with a list of your planogram projects. (See Project List.)

2. Select the desired project in the list.

3. Under **Send project parameters** on the right of the screen, in the drop-down list next to **Recipients**, select the destination user(s). To select several recipients, just pick them one by one in the list. They will be added to the recipients text field just below.

Tip: If you or your colleagues don't remember your user name, you can find it like this: PlanogramBuilder displays the current user name at the upper right of the work screen as shown in the blue circle below.
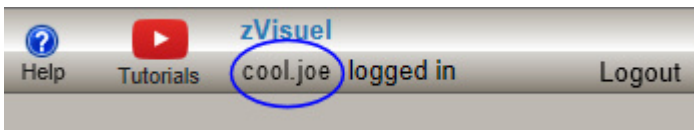
4. Click the **Send** button.

5. When the operation is complete, you will see a confirmation message in the bottom toolbar. The project automatically becomes available in the list of projects of the destination user(s) for opening and editing.

Note: Once a project has been sent to other user(s), your original project and the sent project are totally independent from each other. The sent project is a copy with no connection to the original project. If you wish other users to see the evolution of your project, send the project again, or use a shared Template Project, or else share all projects with other users (see Share All Projects).

Template Projects

Templates are typically projects containing items that you and optionally other users want to re-use on a regular basis, such as your empty rooms, empty bays or guideline planograms.

- Template projects can be displayed in a Template Catalog for easy drag and drop in Planograms.

- Template projects also become instantly accessible to all other users who have access to the same PlanogramBuilder database, typically colleagues in your company.

Only PlanogramBuilder Administrators can create templates, but standard users can see and open any existing template.

Only the owner of a template project is allowed to delete or make modifications to it. Other users can open the template project, but they must save it under another project name if they wish to retain any changes they have made. This prevents users from inadvertently changing the original template.

To set a project as template, follow these steps (*Note:* Only available to a PlanogramBuilder Administrator)

1. Click on the **Manage** button. It will open a dialog with a list of your projects. (See Project List.)

2. Select a project in the list.

3. Check the **Template** checkbox on the right of the screen under Project properties.

4. Press the **Update** button on the toolbar to apply your changes.

Note: A user can only assign his/her own projects as templates.

Note: In Open Project or Add Project (Merge), template projects appear in the list of projects with a special checkmark under the column labeled *Template*.

Template Catalog

Import Project | Templates | Room | Create Bay | Modify Bay | Products | Shelf Tools | Item Info | Publish | Analysis | Local Data | Database

The template catalog is accessed by clicking on the **Templates** tab. It lets you view all your template projects as thumbnails. Any template project can then be merged into your current project by drag and drop.

This feature is very convenient if you want to make available premade rooms, fixtures or guideline projects to all users in your company.
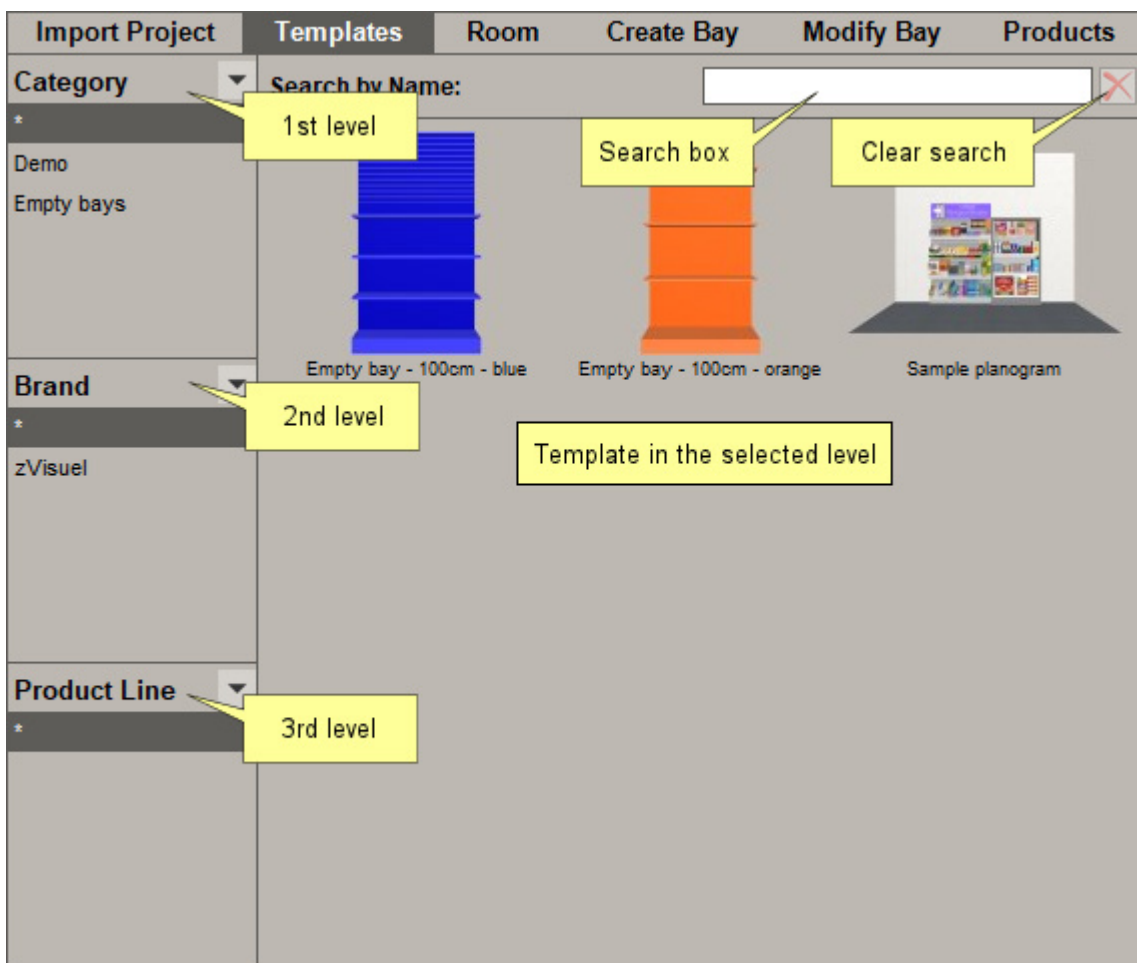
The various elements of the **Templates** task work very much the same way as Product Catalog, with templates sorted by classification and a text search filter.

Share All Projects

Note: Only available to a PlanogramBuilder Administrator

If there are several PlanogramBuilder users in your company, the option called **Shared Projects** lets users share all their Planogram projects.

To set your preference for Share Projects between users, follow these steps:

5. Click on **Settings**.

6. Under **Settings affecting all users** > **Shared projects**, select the desired option:
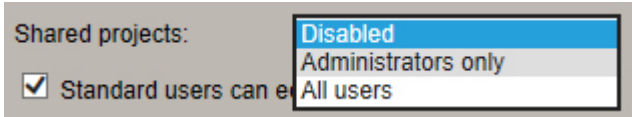
Disabled:

- Only projects you own and template projects are visible in Project List.
- The name of the original project owner is not displayed in Project List (Open Project + Manage Projects).

Administrators only:

- Standard users can open, edit and save projects of all users.
- PlanogramBuilder Administrators can open, edit and save projects of all users. Additionally they can manage all projects of all users: rename, delete, and set as Template / Locked.
- The name of the original project owner is added under a new column labeled *Owner* in Project List (Open Project + Manage Projects).
- You cannot open a project that is already opened by another user. You have to wait the project is no longer opened by the other user.

All users:

- Standard users can open, edit and save projects of all users.
- PlanogramBuilder Administrators can additionally manage all projects of all users: rename, delete, and set as Template / Locked.
- The name of the original project owner is added under a new column labeled *Owner* in Project List (Open Project + Manage Projects).
- You cannot open a project that is already opened by another user. You have to wait the project is no longer opened by the other user.

Note: No matter the setting for this option, *Locked* projects cannot be saved while the flag is ON, and *Template projects* can only be saved by their owner while the flag is ON.

Tip: You can use this feature to manage the sample project provided with PlanogramBuilder:

1. Select **Administrators only** or **All users** (maybe temporarily)
2. Close the **Settings** panel
3. Click on the **Manage** button on the upper toolbar
4. Although you are not the owner of the project named *sample planogram*, you can see it and select it in Project List.
5. Once this project selected, you can change any of its properties and even delete it.

Backup and Restore Projects

Backup Projects

Note: Only available to a PlanogramBuilder Administrator

PlanogramBuilder lets you create a local backup of your projects. The backup includes all projects from all users in your company.

To back up your planogram projects, follow these steps:

1. Click on the **Manage** button. It will open a dialog with a list of your projects. (See Project List.)

2. Click on the **Backup** button. This opens a *file save* dialog.

3. Choose a local folder, optionally change the suggested file name and the Excel file format.
4. Click **Save** to create the backup Excel file.

Tip: Before backing up projects, make sure to display the projects of all users in your project list. To do so, enable Share Projects for *administrators* (see Share All Projects).

Restore Projects

*Note:* Only available to a PlanogramBuilder Administrator

PlanogramBuilder lets you restore projects from an existing local backup. The process restores all the projects listed in the input file.

To restore your planogram projects, follow these steps:

1. Click on the **Manage** button. It will open a dialog with a list of your projects. (See Project List.)

2. Click on the **Restore** button. This opens a *file open* dialog.

3. Choose the folder and the Excel file corresponding to the projects to restore.
4. Click **Open** to restore the projects.

What happens exactly when you restore projects

- Projects listed in the input file and that don't exist in your project list are added to your project list. This is typically the case with projects that were deleted after your last backup.

- Projects listed in the input file and that already exist in your project list overwrite the respective projects in your project list. Any changes made after the date of the input backup file will be lost.

- Projects that already exist in your project list but not listed in the input file are left in your project list. No project is deleted.

Editing the Excel input file

The restore command must always use as a base an input file created by the backup command, but you can edit the Excel input file to update some project information and to remove any project that you don't want to restore. To do such, open the input file in your Spreadsheet application and optionally do the following:

- Delete one or several lines to prevent restoring some project(s). This way you can keep only the lines corresponding to the project you want to restore. *Warning*: very large projects can be on multiple lines. In this case, keep the line(s) with checksum *0* with the last line (showing a different checksum) of the project together.

- Edit values in any of the following column: *Name, Comment, Date Created, Date Modified, Template, Locked, Owner, Sender, Category, Brand, Product Line*. If you change values in these columns, make sure to use the exact same format as other lines and enter values that make sense. For example, don't enter a non-existing *username* in the *Owner* field.

- **Important**: Never edit the following columns: *Project #, Data, Checksum*.

- Use **Save As...**, not Save to save your modified file: this way you will still have the original backup file.

Important Tip: Before Restore Projects, make sure to create a backup so you can revert in case something goes wrong.

Tip: Before Restore Projects, make sure to display the projects of all users in your project list. To do so, enable Share Projects for *administrators* (see Share All Projects).

Screen Navigation

In this section we explain how to navigate in the viewing area.

Zoom

To zoom in the viewing area, select the **Zoom** tool. Click and hold your mouse button down on the viewing area, then move your mouse up to zoom in or down to zoom out. (Shortcut key **Z**)

You can also scroll your **mouse wheel** to zoom in and out (when the mouse cursor is within the viewing area). This method provides a convenient temporary zoom while keeping the current tool active (such as the *Edit* tool).

Note: When you zoom in, the scene is centered on the location of your mouse pointer.
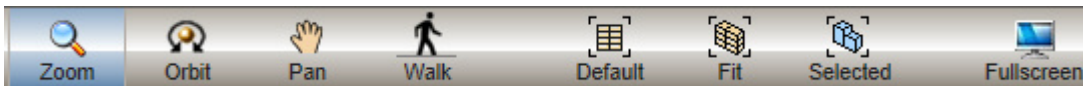
Tip: this tool is also available in the **Navigation menu** and **Context menu > Navigation**.

Orbit

Use the **Orbit** tool to rotate the scene. Click and hold your mouse over the viewing area, then move your mouse in the direction you wish to rotate. Release the mouse button when you are satisfied with the orientation. (Keyboard shortcut **O**)

Note: The scene rotates around the position of your mouse pointer.
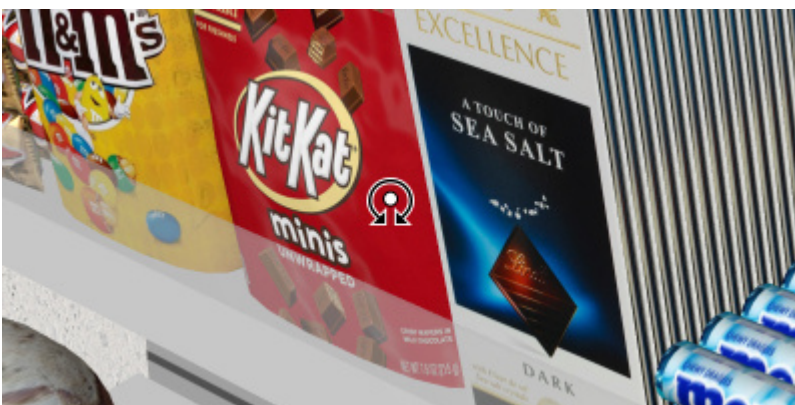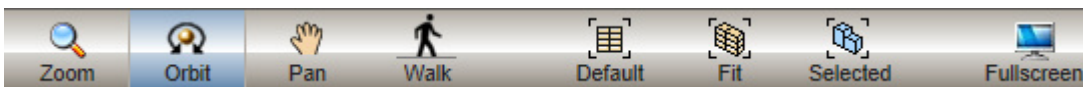
Tip: this tool is also available in the **Navigation menu** and **Context menu > Navigation**.

Pan

Use the **Pan** tool to move the scene left, right, up or down. Click and hold your mouse over the viewing area and move your mouse in the direction you wish to move. (Keyboard shortcut **P**)
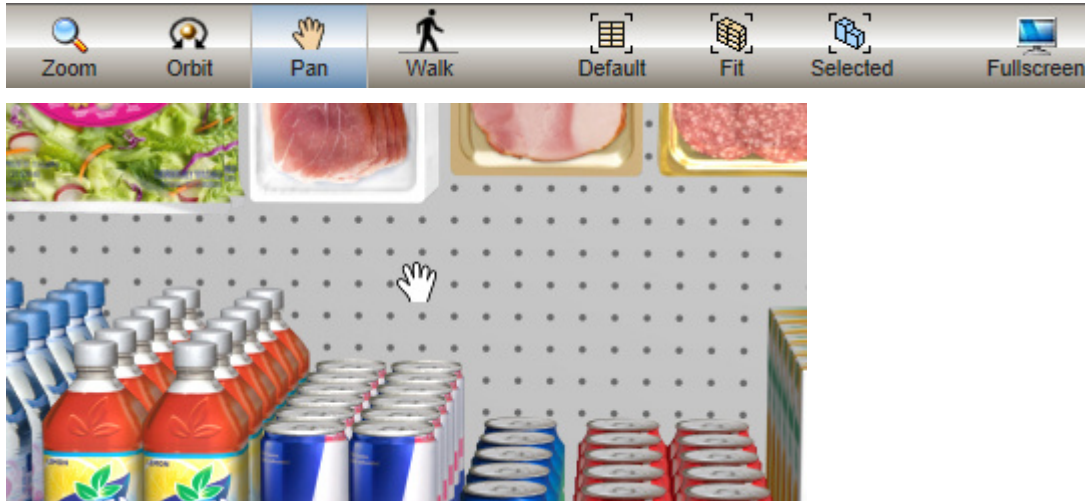
Tip: this tool is also available in the **Navigation menu** and **Context menu > Navigation**.

Field of View

The **Field of View** (FOV) tool lets you increase and decrease the perspective effect in the viewing area. It is similar to changing the focal length of a lens on a real camera. (Keyboard shortcut **F**)

To change the field of view, there ae two methods:

Method 1:

Activate this tool , then move your mouse up or down with the left mouse button pressed until you are happy with the perspective. Then release your mouse button.

Method 2:

Activate this tool, then type the desired FOV angle value in degrees on the button.

Notes:

While the tool is active, you can click on the viewing area to reset the default value.

The default value is also automatically reset to when closing PlanogramBuilder.

Tip: this tool is also available in the **Navigation menu** and **Context menu > Navigation**.

Walk

The **Walk** tool lets you to move your viewpoint in the viewing area by moving your mouse around, as if you were walking in the store. (Keyboard shortcut **W**)
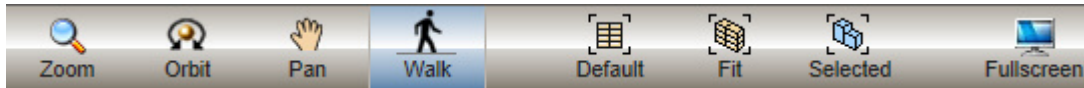
You can use your mouse:

- To walk, press the *left mouse button* over the viewing area, then move the mouse up to go forward, down to go backwards, left to turn left and right to turn right.

- To look up or down, press the *left, then the right mouse buttons and hold both down* or press *Space key + Left mouse button* and drag the mouse up / down.

Or you can use the keyboard:

- To walk, press the *Arrow key(s)* corresponding to the direction you want to go.

- To look up or down, hold the *Space key + Up* or *Down Arrow key*.

Select any other tool to exit Walk tool.

Note: As soon as you start a new walk with this tool, the viewpoint is automatically relocated to match an average human eye level and sight angle.

Tip: you may want to widen the FOV for a more lifelike experience when walking (see Field of View).

Tip: this tool is also available in the **Navigation menu** and **Context menu > Navigation**.

Default

The **Default** (View All) command resets the viewing area to a predefined view which fits all visible elements in your planogram. (Keyboard shortcut **A**)
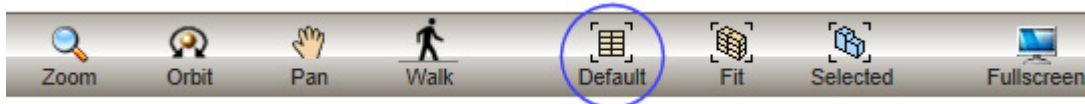
This predefined view varies depending on which task is active when you apply the command:

- In Room task, your planogram is shown from the front looking downwards to facilitate Room creation and edition.

- In other tasks, your planogram is shown straight from the front.

Tip: this command is also available in the **Navigation menu** and **Context menu > Navigation**.

Top

The **Top** command shows all your planogram elements in a plan view. (Keyboard shortcut **T**)

View All	A
Top View	T
Fit to View	
Fit Selected	
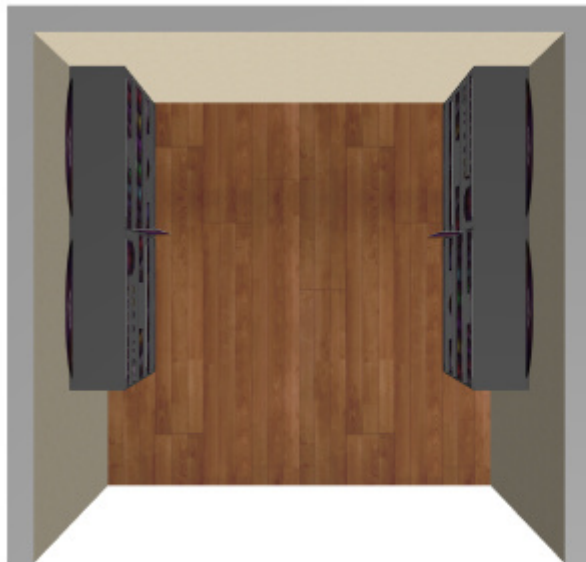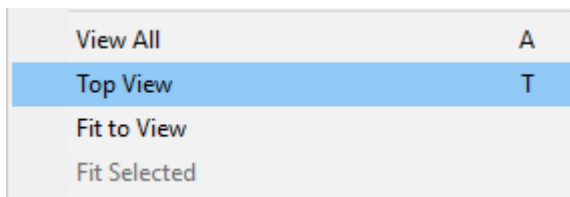
Top view in perspective

Top view in orthographic

Tip: this command is also available in the **Navigation menu** and **Context menu > Navigation**.

Fit

The **Fit** command lets you see all your planogram elements while retaining the current viewing angle and field of view.

Tip: this command is also available in the **Navigation menu** and **Context menu > Navigation**.

Selected

Selected zooms to fit the currently selected item(s) on screen while retaining the current viewing angle and field of view.

Tip: this command is also available in the **Navigation menu** and **Context menu > Navigation**.

Undo / Redo

| Import Project | Templates | Room | Create Bay | Modify Bay | Products | Shelf Tools | Item Info | Publish | Analysis | Local Data | Database |

| Import Project | Templates | Room | Create Bay | Modify Bay | Products | Shelf Tools | Item Info | Publish | Analysis | Local Data | Database |

| Import Project | Templates | Room | Create Bay | Modify Bay | Products | Shelf Tools | Item Info | Publish | Analysis | Local Data | Database |

| Import Project | Templates | Room | Create Bay | Modify Bay | Products | Shelf Tools | Item Info | Publish | Analysis | Local Data | Database |

| Import Project | Templates | Room | Create Bay | Modify Bay | Products | Shelf Tools | Item Info | Publish | Analysis | Local Data | Database |

| Import Project | Templates | Room | Create Bay | Modify Bay | Products | Shelf Tools | Item Info | Publish | Analysis | Local Data | Database |

| Import Project | Templates | Room | Create Bay | Modify Bay | Products | Shelf Tools | Item Info | Publish | Analysis | Local Data | Database |

| Import Project | Templates | Room | Create Bay | Modify Bay | Products | Shelf Tools | Item Info | Publish | Analysis | Local Data | Database |

PlanogramBuilder supports multiple undo and redo of planogramming operations on rooms, room elements, bays, bay elements, products and accessories.

You can also undo and redo text typed in text boxes provided the mouse cursor is within the text box.

Undoing your Changes

You can reverse one or several of your previous actions by using the **Undo** command.

Tip: this command is also available in the **Edit menu** and **Context menu > Edit**.

Tip: you can also use the standard **Ctrl+Z** keyboard shortcut.

Redoing your Changes

The **Redo** command re-applies operations that were canceled by the *Undo* command.

Tip: this command is also available in the **Edit menu** and **Context menu > Edit**.

Tip: you can also use the standard **Ctrl+Y** keyboard shortcut.

Room

In the **Room** task, you can create and edit room elements such as floors, walls, ceilings to simulate your retail space. Having a room is optional, so if you don't want to include the retail space in your planograms, you can skip directly to Create Bay to work only with bays and products.

Room Editing Options

Room Visibility

You can toggle the visibility of the Room onscreen. Hiding the room is typically useful when it blocks the view while working with bays or products. See Show the Room.

Room Grid

You can display and snap room elements to a grid helper. See Grid.

Room Dimension Lines

You can display room element dimensions. See Dimension Lines.

Add Room Elements

To add room elements to your planogram:

1. Switch to the Room task.
2. **Drag** new elements to the viewing area.

The following room elements are available:

- **Floor**: an element with 1 material on the top surface. By default floors are 600 × 600 cm (or equivalent), have no bottom surface and no thickness. Combine several floor elements to create non-rectangular sales floors.

- **Wall**: an element with a material on its 2 sides. By default walls are 600 × 300 cm (or equivalent) and have no thickness. You can combine multiple walls to create any room type.

- **Ceiling**: an element with 1 material on the lower surface. By default ceilings are 600 × 600 cm (or equivalent), have no top surface and no thickness. You can combine several ceiling elements to create non-rectangular rooms.

- **Box**: an element with 1 material applied to all sides. By default boxes are 100 × 100 × 100 cm.

For a rectangular room, start by putting a **floor**, and then add **walls** and a **ceiling**.

To create more complex rooms, you can combine several floors, walls and ceilings and use boxes to create other structural elements such as columns or obstacles.

When dragging each new element, PlanogramBuilder tries to position, orient and dimension it to match the existing elements. For example, dragging a new wall close to a floor edge puts the new wall at the edge of the floor and matches the floor edge length.

Note: you can resize room element, including adding thickness.

Tip: If you want to re-use a room in other planograms, save the room as a project and make it a Template available in the Template Catalog to drag into any other planogram.
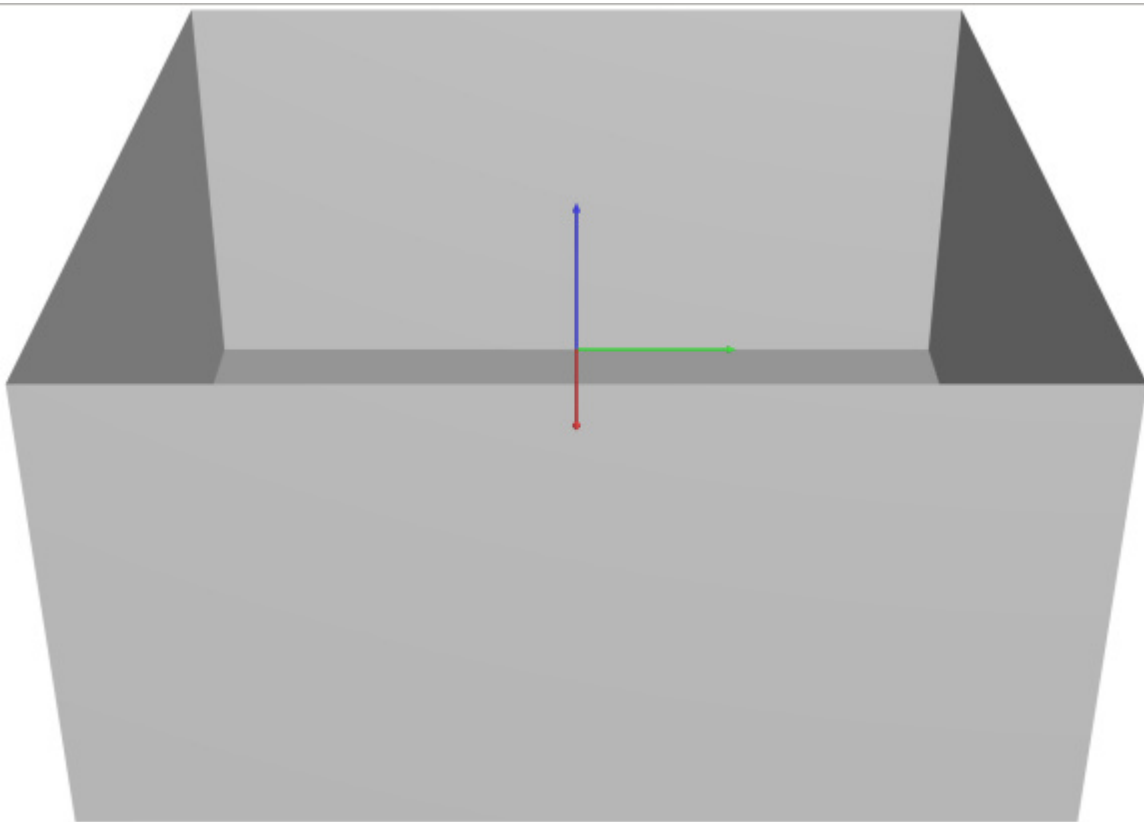
Example of a simple room

Select Room Elements

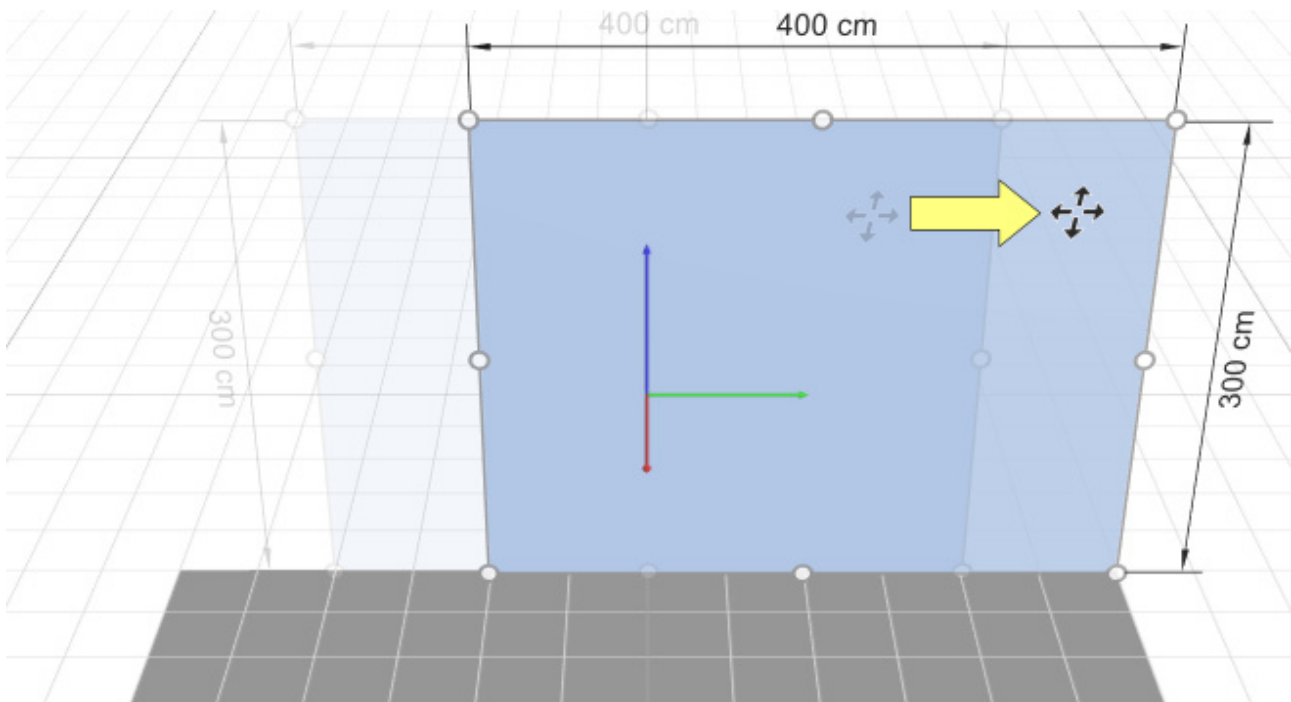Import Project Templates **Room** Create Bay Modify Bay Products Shelf Tools Item Info Publish Analysis Local Data Database

The **Edit Room Element** tool lets you select elements and perform various operations such as editing the room and its elements properties, or moving and copying elements.

1. To select room element(s), switch to the **Room** task.
2. Activate the **Edit Room Element** tool.

3. Select the desired room element(s):

   o   To select one element, **click** on the desired element in the viewing area.

   o   To select multiple elements: Hold the *Ctrl* key while **clicking** on desired elements. Or **draw a rectangle** with your mouse pointer across the desired elements.

4. Selected elements(s) become(s) highlighted in blue so you can perform several tasks with it (them).

Tip: To deselect one or more elements(s), click in an empty area in the viewing area, or *Ctrl + click* on the selected element(s).

Tip: this tool is also available in the **Edit menu** and **Context menu > Edit**.

keyboard shortcut: **R**

Note: The **Edit Room Element** tool is automatically activated when you switch to the **Room task**. In contrast, the keyboard shortcut and menu command activate the tool so you can select room elements but do not automatically switch to the **Room** task.

Resize the Room

Once you have placed at least one room element, the room dimensions are displayed as above.

To change the overall **room** size, edit the **width**, **depth** and **height** values. The room is then rescaled to match your new dimensions. wall, floor and ceiling original thicknesses are maintained.

Resize Room Elements

Resize Room Elements with mouse

1. **Select** the desired *room element(s)*. They (It) become(s) highlighted with round handles around the surfaces most closely facing the screen.

2. If the round handles do not appear on the desired surface, use the Screen Navigation tools such as Orbit to make the desired surfaces face the screen.

---
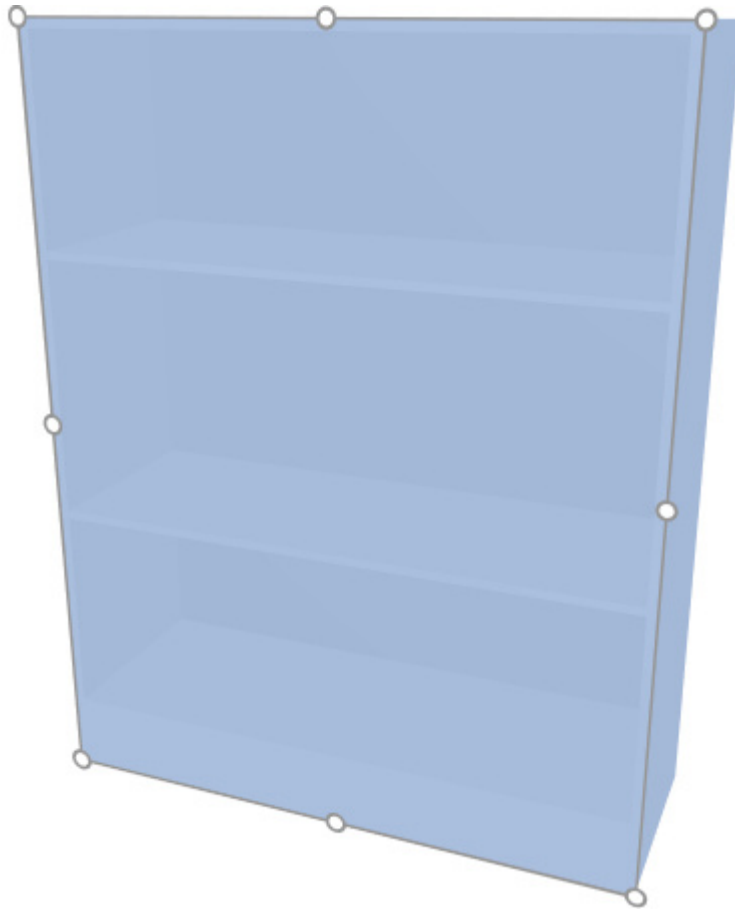
3. **Grab a handle with the mouse** and **drag** it until your element(s) reach the desired size(s). The corner handles let you resize in two directions, while the handles along edges let you constrain resizing to one direction.
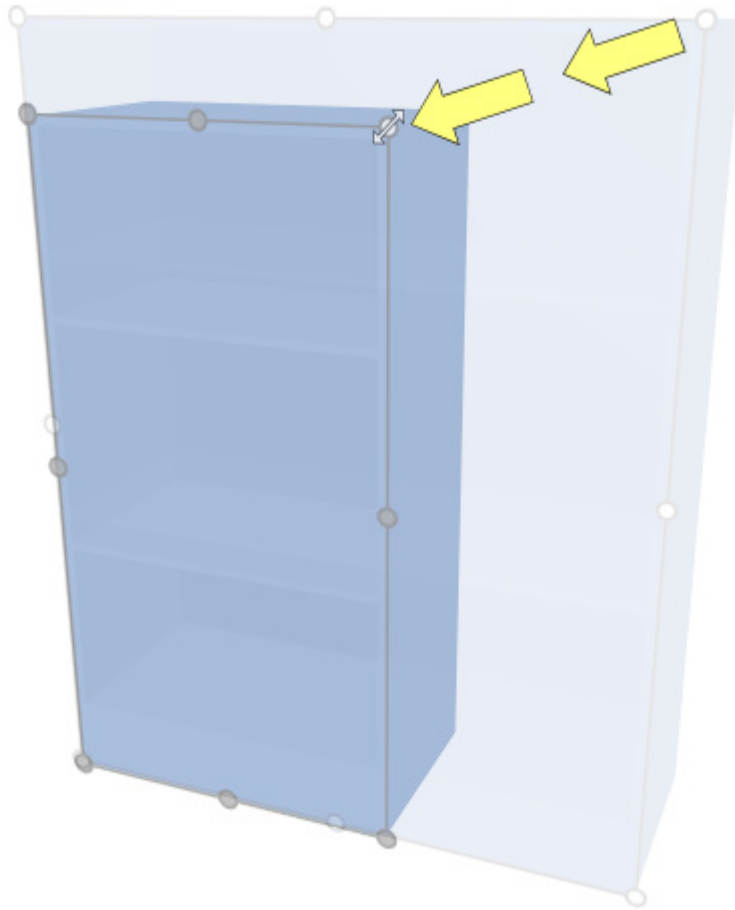
4. **Release the mouse button** when you are satisfied with the element dimensions.

Note: room elements are normally resized to 1 cm or 0.5" rounded position values. To Resize Room Elements completely freely, you can hold the space bar while resizing, producing a slower motion and preventing dimension rounding.

Tip: With Show Dimensions ON, you can display the dimensions of the resizing rectangle while resizing. This is useful if you know in advance the space to allocate to the room element(s).
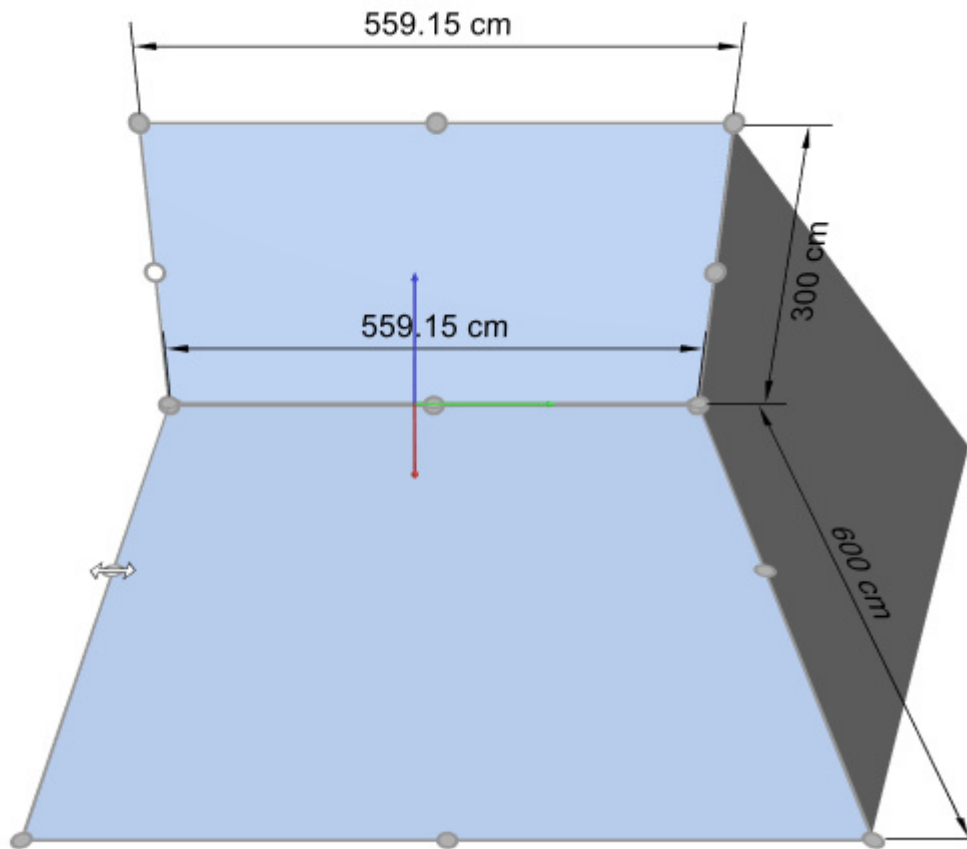
Tip: With Show Dimensions ON, you can also display the actual exact dimensions used by a room element by pressing on a handle of the desired element.
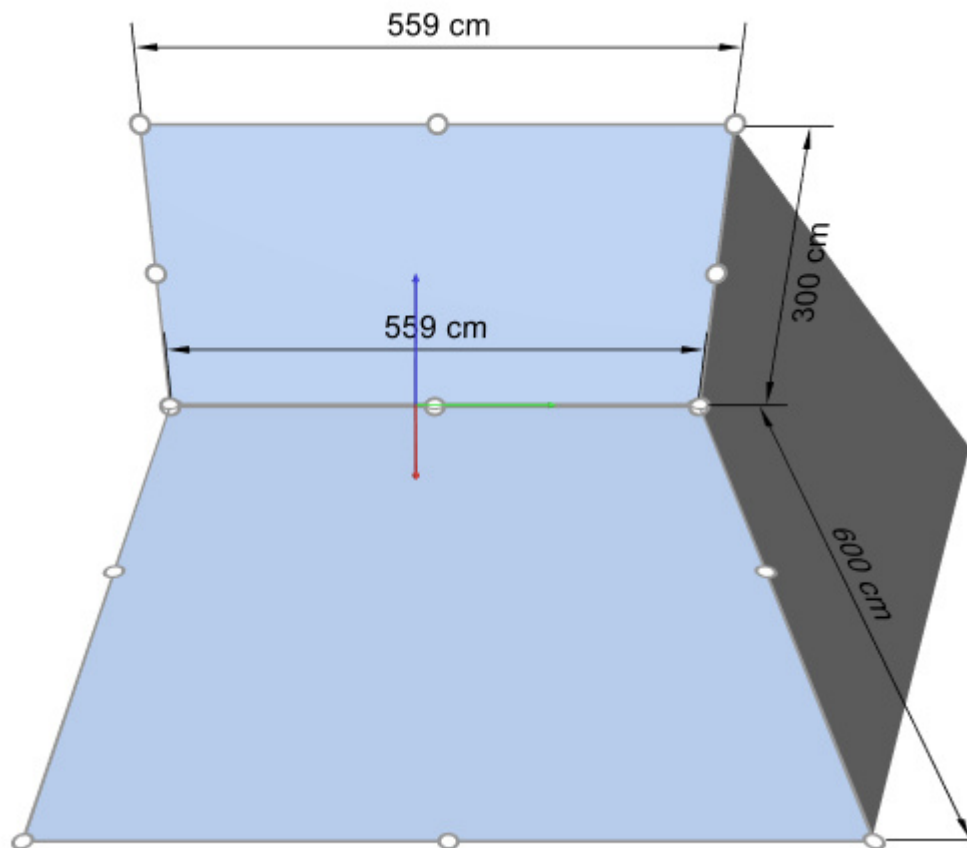
Note: Handles are convenient for quick mouse editing but you can also specify precise values. See Enter Room Element Dimensions.

Enter Room Element Dimensions

1. Select the desired **room element(s)**.
2. Change the **Width**, **Depth** and **Height** values.

Note: By default, room elements have no thickness. (*floors* and *ceilings* have a Height of *0*, and walls have a *Depth* of *0*.) You can add thickness to these elements if desired.

Move Room Elements

Move Room Elements with Mouse

You can move room elements with the mouse in any direction on a horizontal plane.

1. **Select** the desired element(s). They (It) become(s) highlighted and a move pointer is displayed.

2. **Press and hold the mouse** button with the pointer over the selected elements(s) and move the mouse to the desired new position.

3. **Release the mouse** button.

Notes:

- With the Grid *Off*, elements are moved to 1 cm (or 0.5") rounded position values.

- With the Grid *On*, elements are snapped to the grid lines.

- To move elements(s) completely freely, you can **hold the space bar** while moving, producing a slower motion and preventing position rounding.

Example of moving a wall with grid snapping

Note: You can also specify precise values. See Enter Room Element Position.

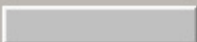# Enter Room Element Position

Import Project   Templates   Room   Create Bay   Modify Bay   Products   Shelf Tools   Item Info   Publish   Analysis   Local Data   Database

To position room elements precisely:

1. Select the desired **room element(s)**.

2. Under **Selected [*element type*]**, change the **Position Y**, Z and/or × values. Each position axis color is also shown in the viewing area axis tripod to help you see to what direction it corresponds.

Selected Wall

Width:	600.00 cm	Position Y:	-450.00 cm
Height:	300.00 cm	Position Z:	0.00 cm
Depth:	0.00 cm	Position X:	-150.00 cm

---

3. The selected **room element(s)** is (are) moved to the specified values.

Rotate Room Elements

Walls and boxes room elements can be re-oriented by specifying precise angle values:

1. Select the desired **room element(s)**.
2. Under **Selected [*Element type*]**, change the **Orientation** value (only for walls and boxes).

Selected Wall			
Width:	600.00 cm	Position Y:	-450.00 cm
Height:	300.00 cm	Position Z:	0.00 cm
Depth:	0.00 cm	Position X:	-150.00 cm
Color:		Orientation:	90.00°

3. The selected **room element(s)** is (are) re-oriented to the specified values.

Copy Room Elements

1. **Select** the desired room element(s).
2. **Press and hold *Ctrl* key + mouse button** with the pointer over the selected elements(s) and move the mouse to the desired copy position.
3. **Release the mouse button**.

Notes:

- With the Grid *Off*, copied elements are placed at 1 cm (or 0.5") rounded position values.
- With the Grid *On*, copied elements are snapped to the grid lines.
- To place copied elements(s) completely freely, you can hold the *space bar* while moving, producing a slower motion and preventing position rounding.
- After copying, you can reposition elements precisely. See Enter Room Element Position.

Delete Room Elements

1. Select the desired **room element(s)**.
2. Press the **Delete button** or the **Delete key** on your keyboard.

Room Element Color

1. Select the desired **room element(s)**.
2. Click on the **Color swatch** to display the color palette.

Selected Wall

Width:	600.00 cm	Position Y:	-450.00 cm
Height:	300.00 cm	Position Z:	0.00 cm
Depth:	0.00 cm	Position X:	-150.00 cm
Color:		Orientation:	90.00°

3. Select a new color and click **Ok**.

Color

Basic colors:

Custom colors:

Define Custom Colors >>

OK	Cancel

Color

Hue:	160	Red:	255
Sat:	0	Green:	255
Lum:	240	Blue:	255

Add to Custom Colors

Room Element Materials

Apply Room Element Materials
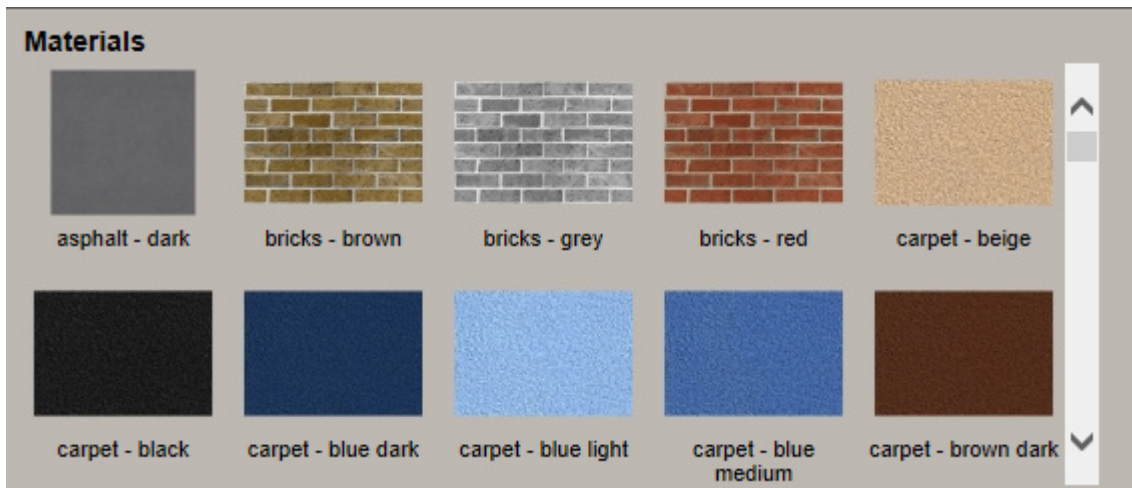
You can make room elements look more realistic by applying materials.

PlanogramBuilder comes with a set of predefined commonly used materials

You can also add your own materials to the database and they will be available in the materials Catalog. For example you can import a floor plan image of your sales surface, then apply it to a floor element and use it as a basis to construct your room in 3D. See Add Database Item.

Note: Predefined materials cannot be removed from the Catalog and are not listed in Database Editor.

To apply a material to an element or to a one of its surfaces:

1. Find the desired material in the **Material** catalog shown above

2. Drag the material thumbnail to the desired room element in your planogram.

3. The material is now applied to the element.
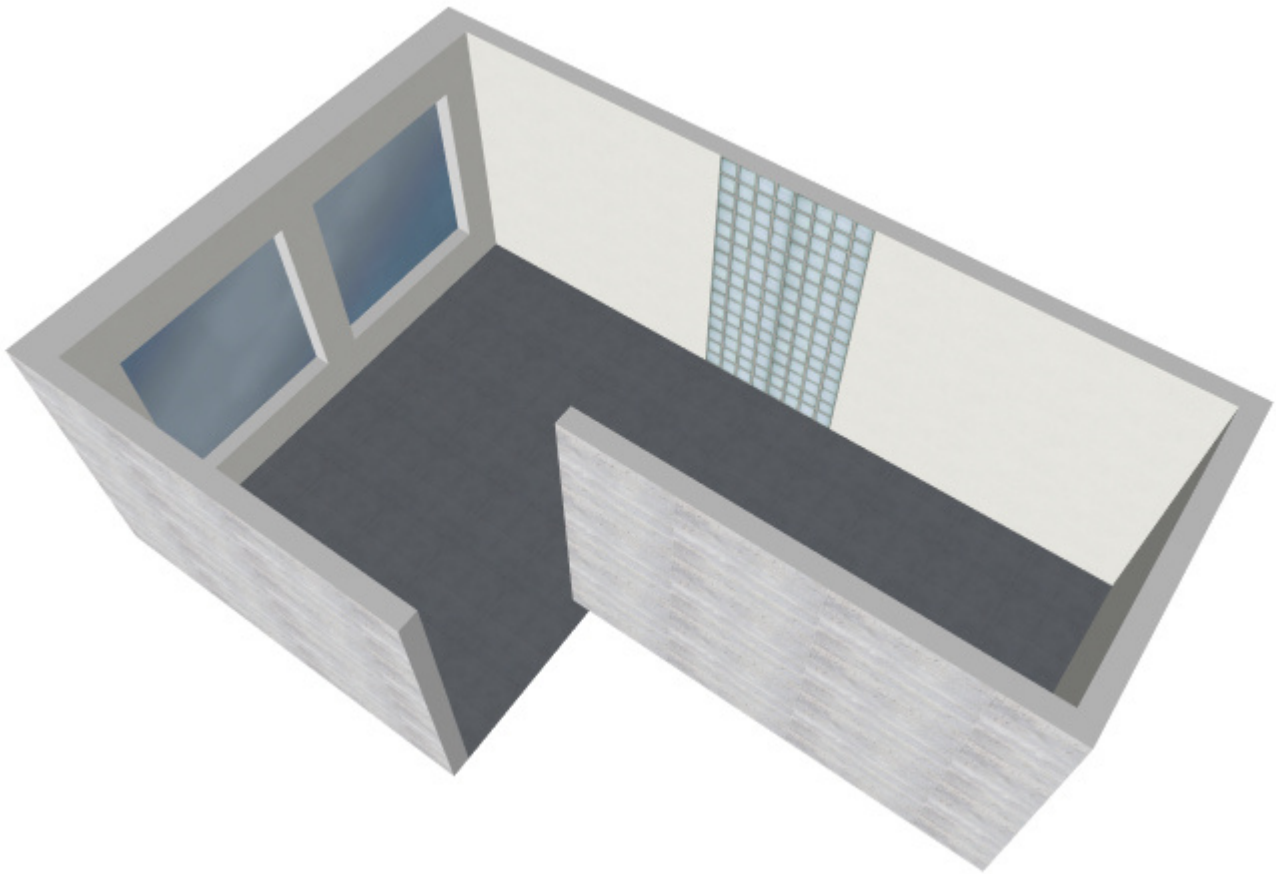
Example of a room with a combination of room elements and materials.

Adjust Room Element Materials

Once a material has been applied, you can adjust it as follows:

Selected Wall

Width:	600.00 cm	Position Y:	-450.00 cm
Height:	300.00 cm	Position Z:	0.00 cm
Depth:	0.00 cm	Position X:	-150.00 cm
Color:		Orientation:	90.00°

Material1: bricks - red ✕

☑ Tile: Width: 100.00 cm
          Height: 70.00 cm

Material2: bricks - brown ✕

☐ Tile: Width: 100.00 cm
          Height: 70.00 cm

1. Select one or more **room element(s)** which have at least one material applied.
2. Edit the material:

Clear button (small red cross): Removes a material from the selected elements.

Tile: Changes the way the material is scaled on the room element.

- **ON**: The material image repeats as a fixed size pattern onto the room element.
- **Width**: Sets the **Tile** width in current units (when *Tile* is *ON*).
- **Height**: Sets the **Tile** height in current units (when *Tile* is *ON*).
- **OFF**: The material image is stretched to fill the entire room element.
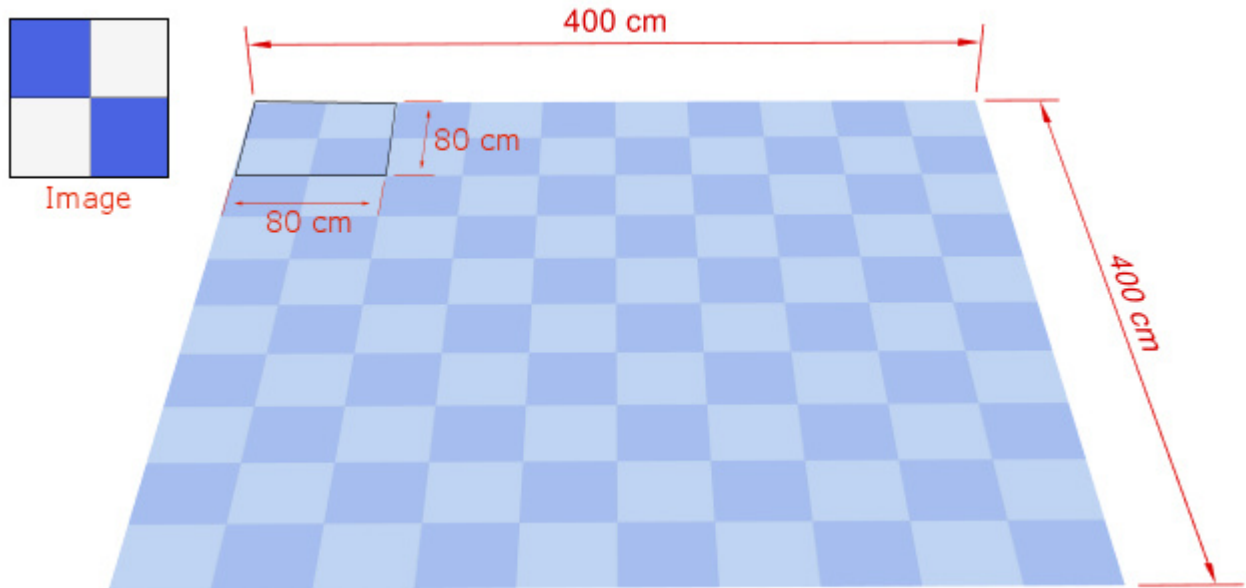
Example of a material with Tile ON, Width 80 cm, Height 80cm. The image is repeated.
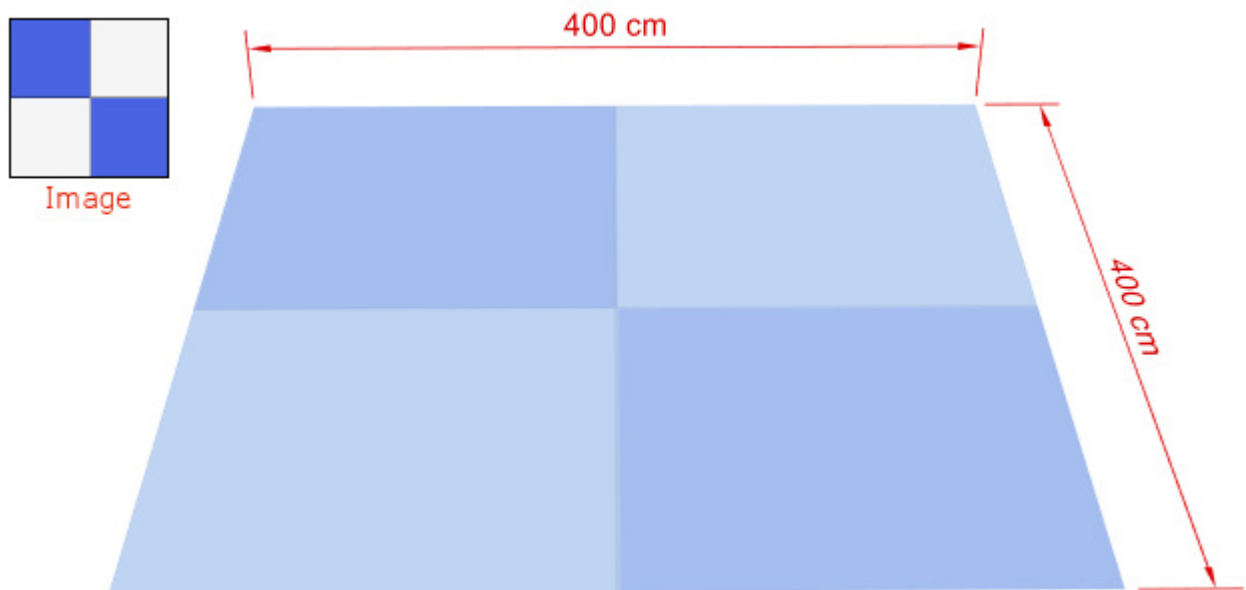
Example of a material with Tile OFF. The image is stretched to fill the element.

Note: *floors*, *ceilings* and *boxes* have 1 material, while *walls* can have 2 materials, one for each side of the wall. To apply a material to the desired side of a wall, make sure to orbit the view so that the desired side is visible before dragging the material onto it.

Tip: If you want to re-use a room in other planograms, save the room as a project and make it a Template Projects available in the Template Catalog to drag into any other planogram.

Create Bay

Video tutorial on this topic: 10: Creating and managing bays
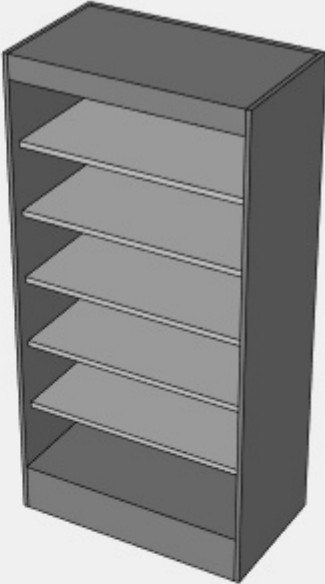
The **Create Bay** task is where you define and add new fixtures to your planogram projects. In PlanogramBuilder, bays are parametric 3D objects that you can build as per the specifications of real fixtures found in your point of sales.

The basic characteristics of new bays (gondolas) are specified here and will apply to all new bays until you change settings again. You can then further customize existing bays in the **Modify Bay** task.

New Bay Parameters

Import Project Templates Room Create Bay Modify Bay Products Shelf Tools Item Info Publish Analysis Local Data Database

Before you add a new bay to your planogram, specify its parameters in this panel. A preview of the bay with is displayed in the upper right area.

Note: the bay preview is displayed with visible edge lines to make each element clearly distinguishable. You can also turn this mode on in the planogram viewing area if you wish (see Show Edges).

Note: the bay attributes will be kept for the next time you run the application.

Note: you can further customize bays in the **Modify Bay** task. For example you can add and remove, resize, re-position or change colors of bay elements.

Bay Parameters

Bay dimensions

Specify dimensions as follows (*Note*: The bay depth is determined by the combined dimensions of the shelves and back panel if any. See below for specifying these parameters.):

Overall width specifies the horizontal width of the bay. You can also use decimals.

The bay height can be specified with either one of the following methods:

- Choose the *Overall height* and the *Number of shelves* if you know the bay height.

- Choose the *Gap between shelves* and the *Number of shelves* if you the space between each shelf is more important than the overall height of the bay.

Overall height sets the overall height of the bay.

Overall height **radio button**: Upon typing a value for this parameter or manually checking the corresponding radio button, the *Overall height* will be constrained to the set value. This way, editing other values such as *Number of shelves* cannot change the *Overall height* of the bay, but will modify the *Gap between shelves* instead.

Gap between shelves sets the vertical empty space between shelves. All shelves are evenly spaced.

Gap between shelves **radio button**: Upon typing a value for this parameter or manually checking the corresponding radio button, the *Gap between shelves* is constrained to the set value. This way, editing other values such as *Number of shelves* cannot change the *Gap between shelves*, but modifies the *Overall height* instead.

Number of shelves tells how many shelves the bay will feature.

Note 1: Changing the number of shelves influences the *Overall height* if you checked the radio button in front of *Gap between shelves*. Inversely, changing the number of shelves modifies the *Gap between shelves* if you checked the radio button in front of *Overall height*.
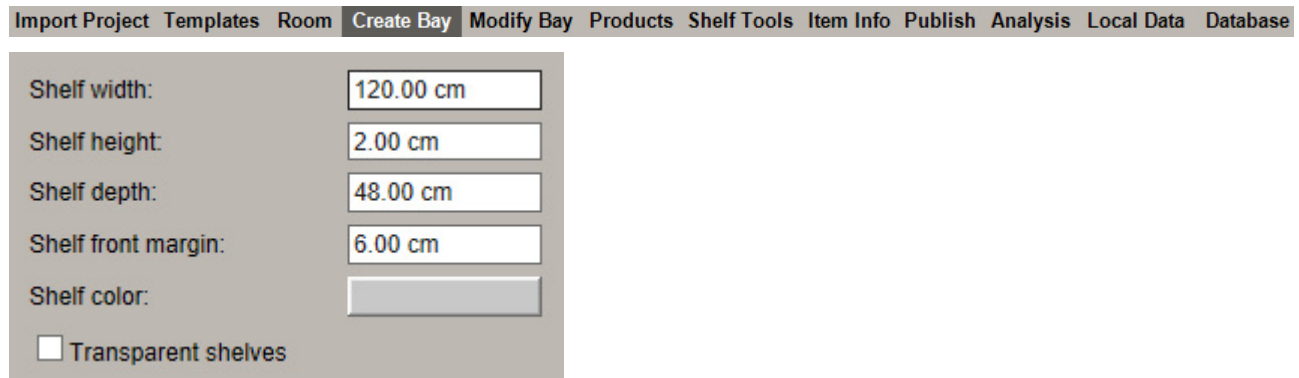
Note 2: *base* and *top cover* don't count as shelves.

Main color

Allows setting the color of the bay structure (base, back and sides). Click on a rectangle, and then choose a tint with the standard Color Dialog.

Note: shelves have a separate color parameter, so you can make the shelves a different color than the rest of the bay. See Shelf color.

Shelf Parameters

Shelf Dimensions

Shelf width is the width of the shelves not including lateral sides.

Shelf height specifies the thickness of the shelves.

Shelf depth is the depth of the shelves not including the back panel.

Shelf Margins

Shelf front margin sets how far products will be placed from the front edge of shelves.
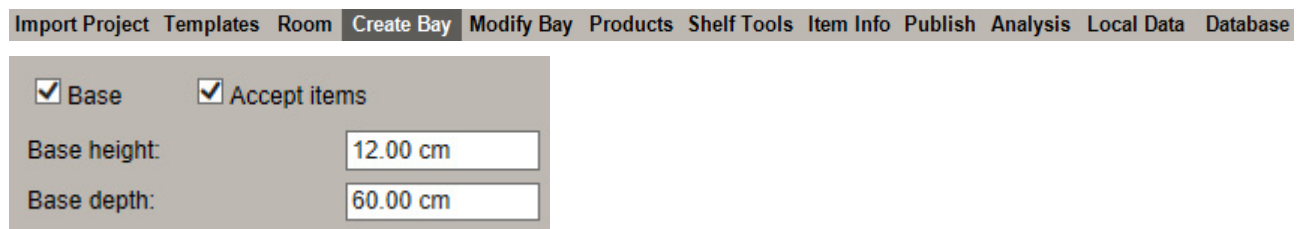
Shelf Color

Allows selecting the color of the shelves. Click on a rectangle, and then choose a tint with the standard Color Dialog.

Transparent shelves

Specifies whether shelves are translucent or opaque.

Base Parameters

Base

This check box allows to choose whether you want a base on the bay.

Accept items

Defines whether you can drag items on the base of the bay. Sometimes products are placed directly on the base, while in other cases the base should not accept any products.
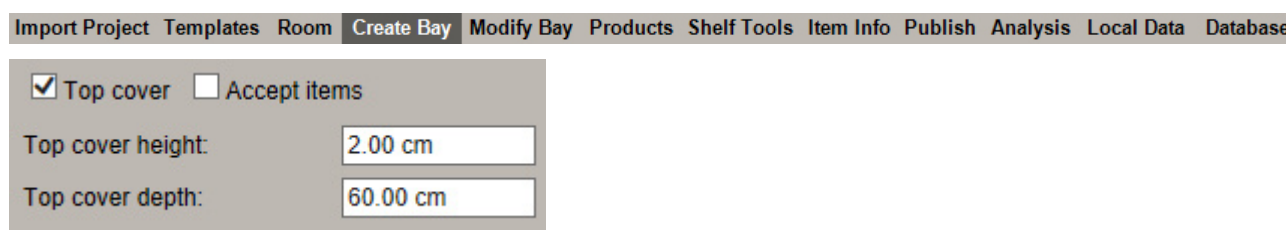
Base height

Adjusts the height of the base. This setting also influences the bay *Overall height* or *Distance between shelves* (according to which radio button is un-checked).

Base depth

Sets the depth of the base, which can be different from the other shelves.

Top cover Parameters

Top cover

This check box allows choosing whether you want a top cover on the bay. This is for example a light box.

Accept items

Defines whether you can drag items on the top cover of the bay.
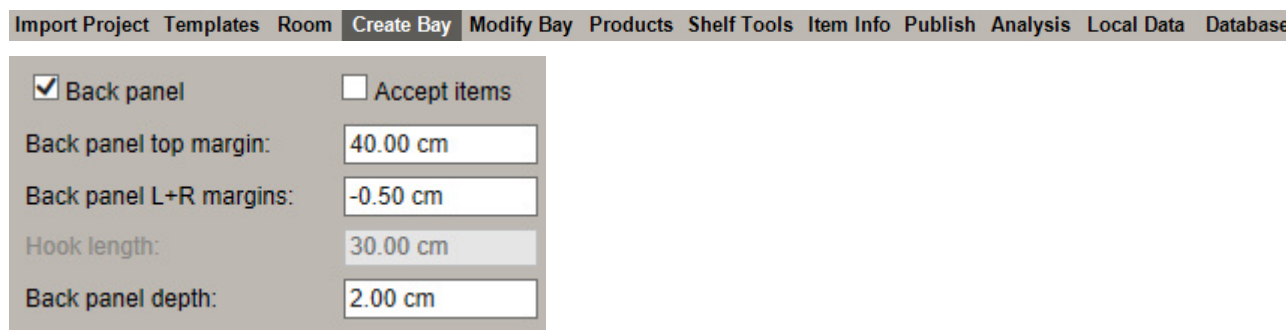
Top cover height

Adjusts the height of the top cover.

Top cover depth

Sets the depth of the top cover, which can be different from the other shelves.

Back panel Parameters

Back Panel

This check box specifies whether the bay has a back panel. You may not want one if the shelves are held by small cables for example.

Accept items

Sets whether you can drag items on the back panel of the bay.

Back panel top margin

Gives the vertical space between the upmost shelf and the top of the back panel. This setting also influences the bay total height.

Back panel Left and Right margins

Sets the horizontal space between the side of a shelf and the same side of the back panel. This setting will influence the overall bay width value if you set a positive value, effectively making the bay wider than the shelves.

Hook length
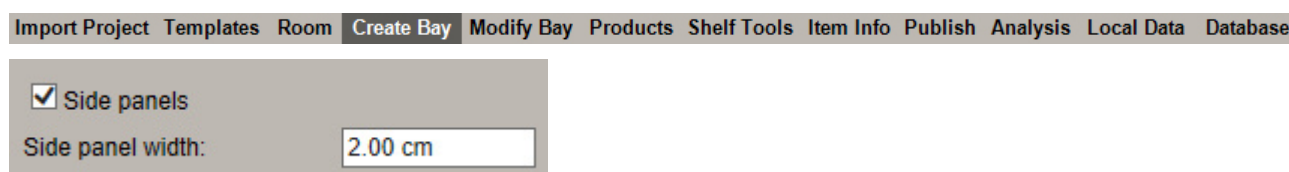
Specifies the distance from the back panel to the tip of pegs. Their specified length is used to determine how many times each product is repeated in depth on the hook.

Note: The actual hooks are created automatically when you place pegged products on the back panel. The pegs can also be hidden if you prefer (see Show Peg Hooks).

Back panel depth

The thickness of the back panel.

Side panels Parameters

| Import Project | Templates | Room | **Create Bay** | Modify Bay | Products | Shelf Tools | Item Info | Publish | Analysis | Local Data | Database |

☑ Side panels

Side panel width: 2.00 cm
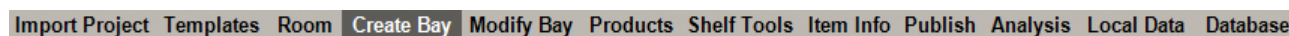
Side panels

This check box allows choosing whether you want side panels on the bay. This setting also influences the overall bay width.

Side panel width

Represents the thickness of each lateral side panel.

Add Bay

| Import Project | Templates | Room | **Create Bay** | Modify Bay | Products | Shelf Tools | Item Info | Publish | Analysis | Local Data | Database |

To add a new bay to your current planogram:

1. Activate the **Create Bay** task.

2. Set the New Bay Parameters.

3. Click on **Add** to put the new bay in your planogram.

The bay is placed at the center of the scene if there is space, otherwise to the right of any existing bay.

Clicking **Add** several times will create exactly the same bay.

Tip: Just after you have defined and added the desired bays to the viewing area, it can be useful to save the project with the empty bays to be re-used as a template. You can name it for example "Template bays for store X"; then you just need to drag that template from the Template Catalog to start a new project with the same bays.

Tip: To create new bays, you can also copy existing bay(s) from your planogram and modify it / them if necessary.

Tip: this command is also available in the **Edit menu** and **Context menu > Edit**.

Modify Bay

Video tutorial on this topic: 11: Editing bays

The **Modify Bay** task is where you can edit existing bays in your planograms.

This is often necessary to obtain the exact desires bay dimension and properties.

There are two main tools in this Task:

- The **Edit Bay** tool to edit whole bays.
- The **Edit Bay Element** tool to work with sub-elements such as shelves and back panels.

Tip: these tools are also available in the **Edit menu**.

By default the **Edit Bay Element** is active when you activate the **Modify bay** task.

Note: It is possible to disable bay editing for Standard Users. See Locked Bays for Standard Users.

Bay Editing Options

There are some main options which will affect the way bays can be edited and placed in your planograms.

Free Bays (Bay Placement Mode)

In PlanogramBuilder, you can choose to place your bays in two different modes depending on your needs:

Free Bays OFF

In this mode, bays are always placed side-by-side adjacent and parallel to each others. This mode is well suited for planogram projects that represent a single store aisle.

To turn the **Free Bays** mode **OFF**, do the following:

1. Open the **Edit Menu**.
2. Uncheck the menu item labeled **Free Bays**.
3. The Free Bays menu item shows no checkmark if the mode is *OFF*.

Here is an example of bays with Free bay OFF below:

Free Bays On

In this mode, each bay can be freely positioned and oriented in your planogram project. This mode is well suited for planograms that represent a more complex retail area, such as non adjacent bays, several aisles, a shop-in-shop or simply multi-sided fixtures.

To turn the **Free Bays** mode **ON**, do the following:

1. Open the **Edit Menu**.
2. Check the menu item labeled **Free Bays**.
3. The Free Bays menu item shows a checkmark if the mode is *ON*.

Here is an example of Free bay ON below:
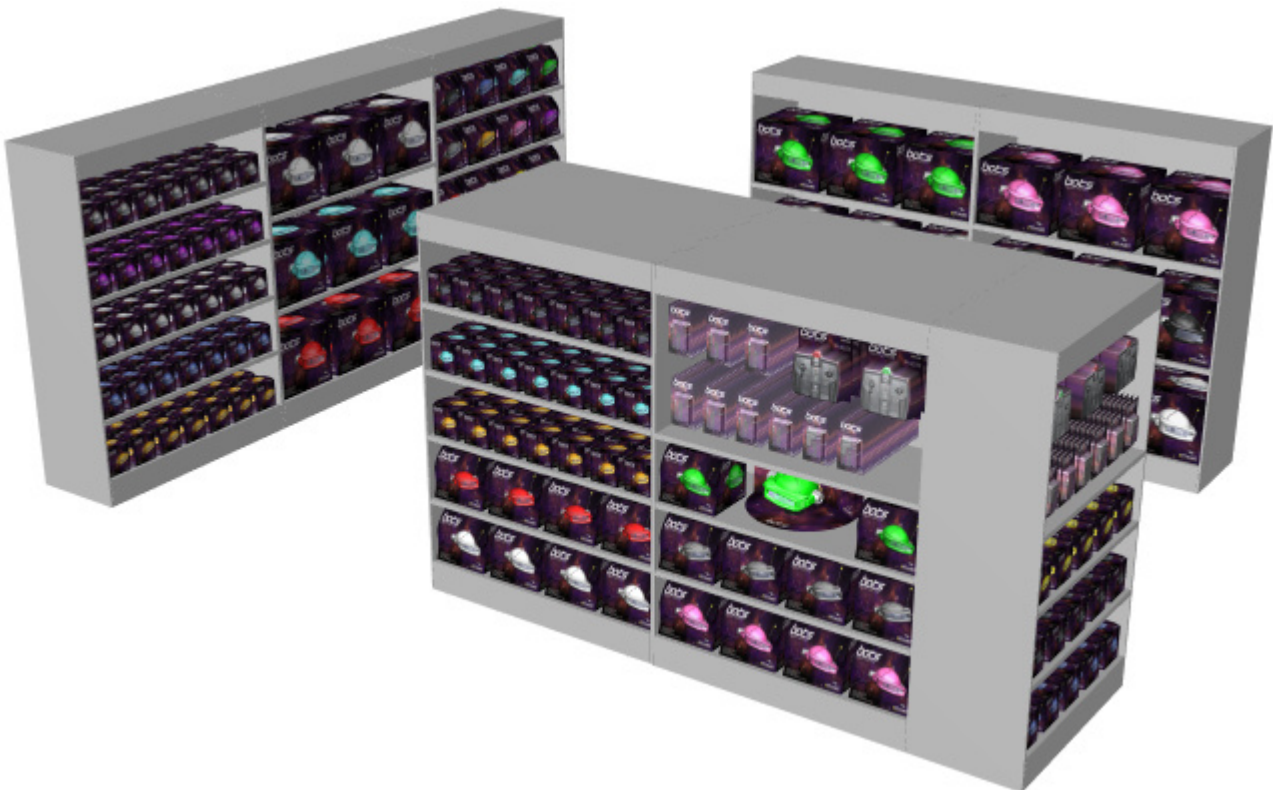
Note: The selected mode is saved with the current project.

Note: Free bays is turned OFF by default for new projects.

Warning: Turning Free bays OFF in a project that contains freely positioned bays will reposition all bays to be aligned and adjacent to each others.

Note: If your current project has Free bays OFF and you merge a Free bays project (Add project), Free bays will automatically be turned ON for the current project to allow positionning the merged bays correctly.

Tip: this tool is also available in the **Edit menu** and **Context menu > Edit**.

Tip: Use the Walk tool to simulate walking in the retail area.

Locked Bays for Standard Users

Note: Only available to a PlanogramBuilder Administrator

It is possible to completely disable all bay creation and editing features for Standard Users. This is typically useful when one or more PlanogramBuilder Administrator(s) is (are) in charge of creating the bays and make them available to other users as templates or share all Projects.

To disable bay access to Standard Users:

1. Click on **Settings**.

2. Under **Settings affecting all users**, un-check **Standard users can edit bays**.

When **checked**, the following applies:

Standard Users can access the **Create Bay** and **Modify Bay** tasks and commands to create and edit Bays.

When **un-checked**, the following applies:

The **Create Bay** and **Modify Bay** task tabs are hidden to standard users. Only PlanogramBuilder administrators can see these tabs, hence only them can create and edit bays.

All menus and actions related to bay editing are also disabled for standard users. (Ex: *B* key has no effect.)

Front Panel Visibility

You can toggle the visibility of all front panels. Hiding *front panels* lets you select and edit products behind the panels. See Show Front Panels.

Peg Hook Visibility

You can toggle displaying the hooks of pegged products. See Show Peg Hooks.

Select Bays

Import Project Templates Room Create Bay Modify Bay Products Shelf Tools Item Info Publish Analysis Local Data Database
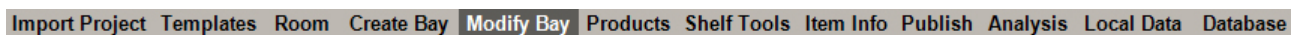
The **Edit Bay** tool lets you select elements and perform various operations such as editing the bay properties or moving and copying bays.

To select Bay(s):

1. Click on the **Edit Bay** tool (or with keyboard shortcut **B**, or from the **Edit menu**).

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2. **Select** Bay(s):

- To select one bay, **click** on a bay in the viewing area.

- To select multiple bays, **hold *Ctrl* key + click** on desired bays, or **draw a rectangle** with your mouse pointer across the desired bays.

3. Selected bay(s) become(s) highlighted in blue and you can perform several tasks on the bays such as deleting, moving, changing dimensions, etc. You can also change common parameters on all bay elements of the selected bay(s). For example, assign one color to all bay elements without having to select each bay element separately.

Tip: To deselect the bay(s), click in an empty area in the viewing area, or select another bay.

Tip: this tool is also available in the **Edit menu** and **Context menu > Edit**.

Keyboard Shortcut: **B**

Note: The keyboard shortcut and menu command activates the **Edit Bay** tool, but do not activate the **Modify Bay** task.

Resize Bays
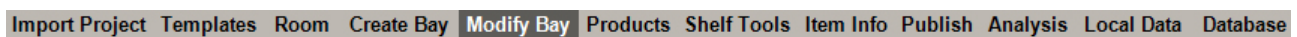
Resize Bays with Mouse
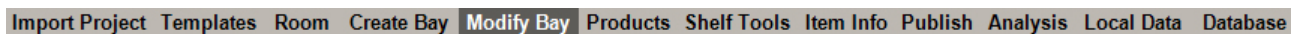
1. Click on the **Edit Bay** tool (or with keyboard shortcut **B**, or from the **Edit menu**).

2. **Select** the desired bay(s). They (It) become(s) highlighted with round handles along the front-most surfaces.

3. If the round handles do not appear on the desired surface, use the Screen Navigation tools such as Orbit to make the desired surfaces face the screen.

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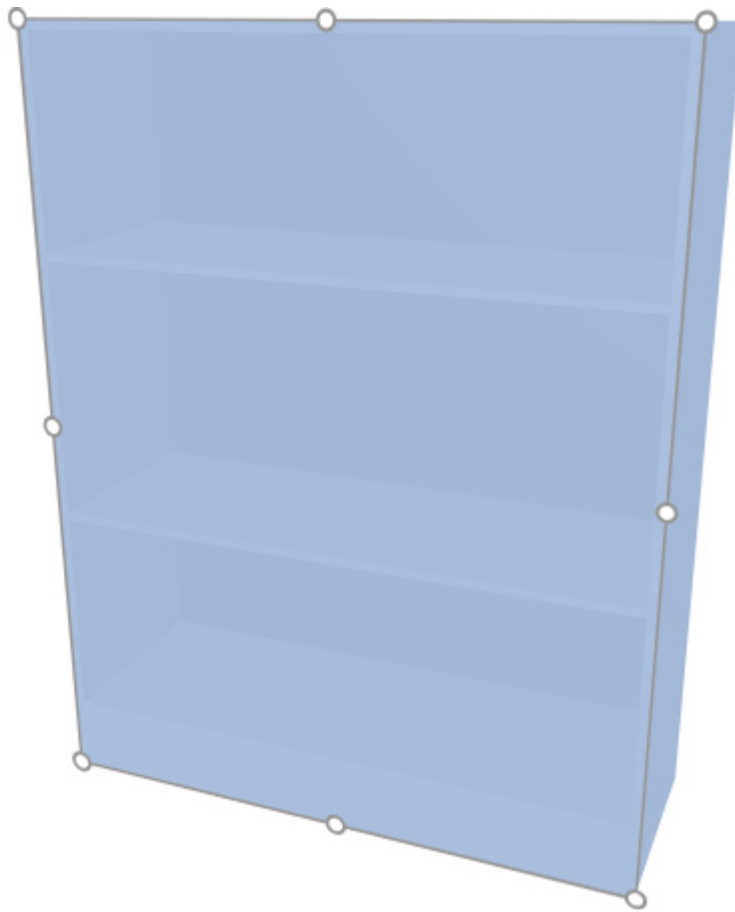
4. **Grab a handle with the mouse button and drag** it until your bay(s) reach the desired size(s). The corner handles let you resize in two directions, while the handles along edges let you constrain resizing to one direction.
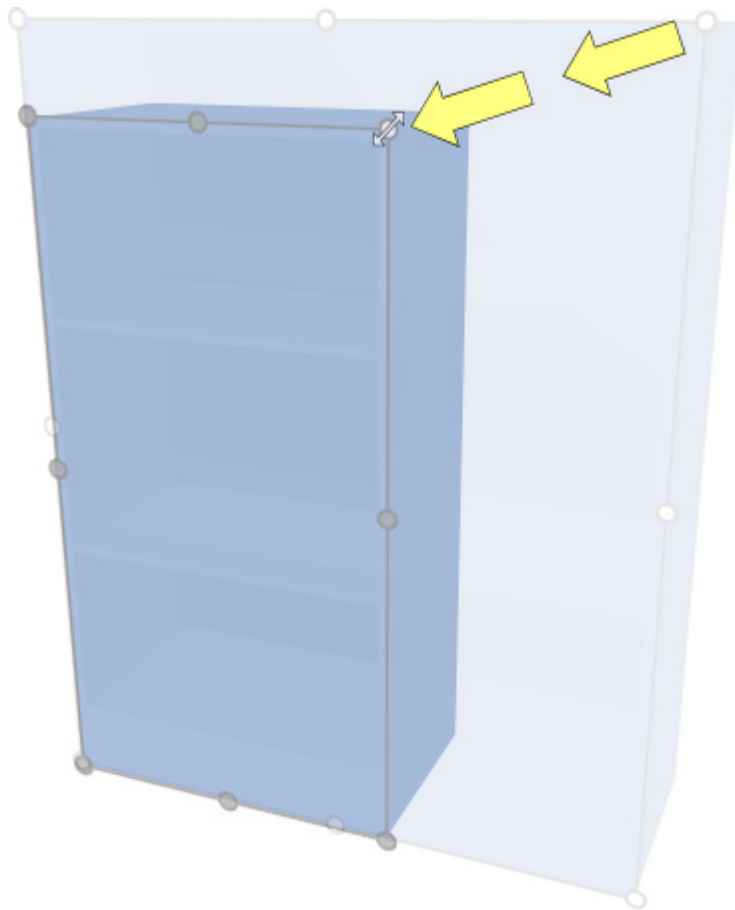
5. **Release the mouse button**. The bay is resized. Note that shelf and divider spacing is automatically recalculated while maintaining the thickness of such elements.

Note: bays are normally resized to 1 cm or 0.5" rounded position values. To resize a bay completely freely, you can hold the space bar while resizing, producing a slower motion and preventing dimension rounding.

Tip: With Show Dimensions ON, you can display the dimensions of the resizing rectangle while resizing. This is useful if you know in advance the space to allocate to the bay element(s).
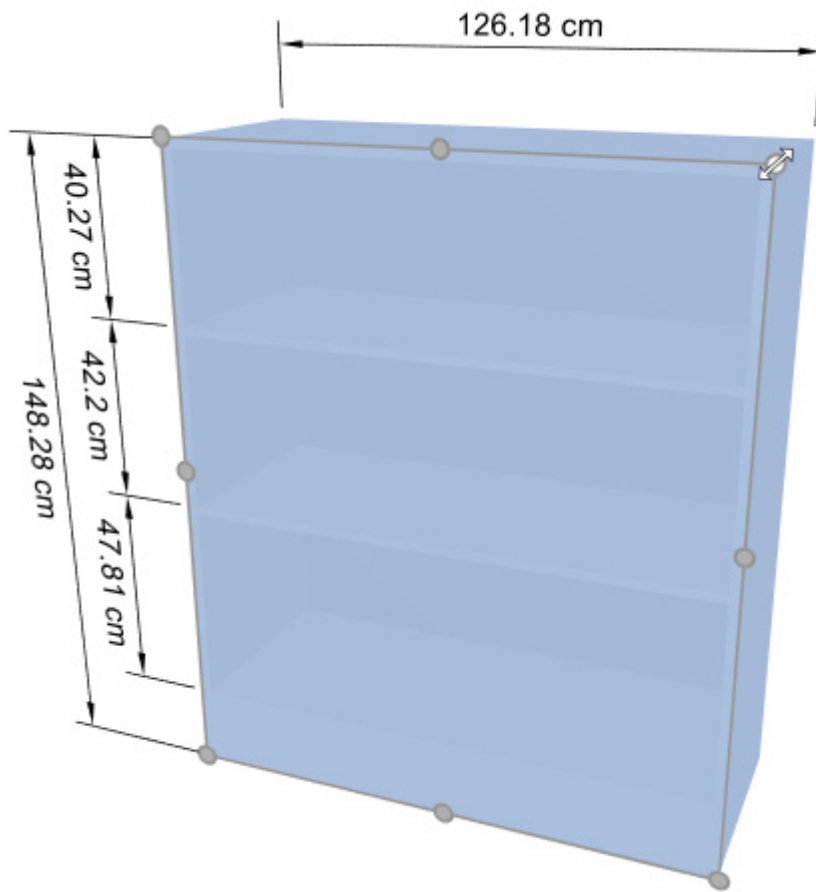
Tip: With Show Dimensions ON, you can also display the actual exact dimensions used by all bays.
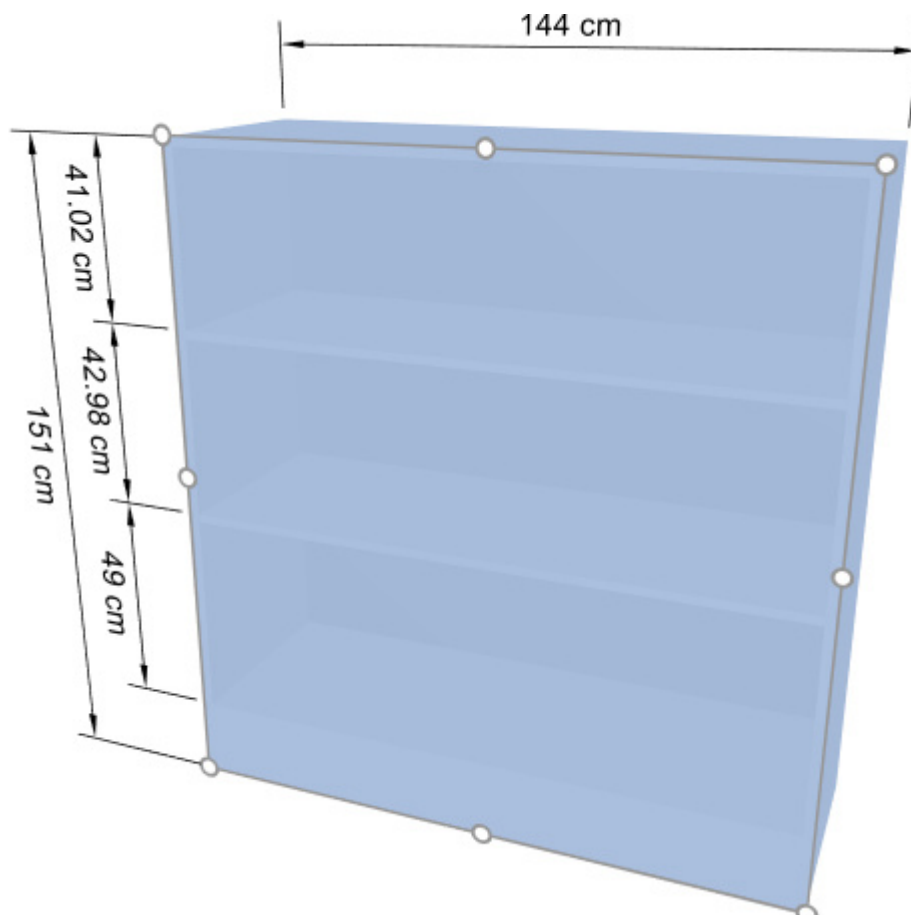
Note: Handles are convenient for quick mouse editing but you can also specify precise values. See Enter Bay Dimensions.

Enter Bay Dimensions

Overall width, **depth** and **height** set the size of the whole bay. The bay(s) is (are) resized according to the new values. Note that shelf and divider spacing is automatically recalculated while maintaining the thickness of such elements.

Move Bays

Move Bays with Mouse

You can move bays with the mouse on a horizontal plane.

1. Click on the **Edit Bay** tool (or keyboard shortcut **B**, or in the **Edit menu**, or in **Context menu > Edit**).

2. **Select** the bay(s) to move (see Select Bays). They (It) become(s) highlighted and a move pointer is displayed.

3. **Press and hold the mouse** button with the pointer over the selected bay(s) and move the mouse to the desired bay position.

4. **Release the mouse** button.

The way the bays are moved depends on the state of the Free Bays (Bay Placement Mode):

- With **Free Bays *Off***: The bay(s) is (are) moved laterally only and placed at the closest position available next to another bay or between two bays, pushing the other bays to make space.

- With **Free Bays *On***: The bay(s) is (are) moved in any direction and placed at the selected position on the ground. If there are one or more other bays at this position, they may overlap.

With the Grid *Off*, bays are moved to 1 cm (or 0.5") rounded position values.

With the Grid *On*, bays are snapped to the grid lines.

To move the bay(s) completely freely, you can hold the space bar while moving, producing a slower motion and preventing position rounding.
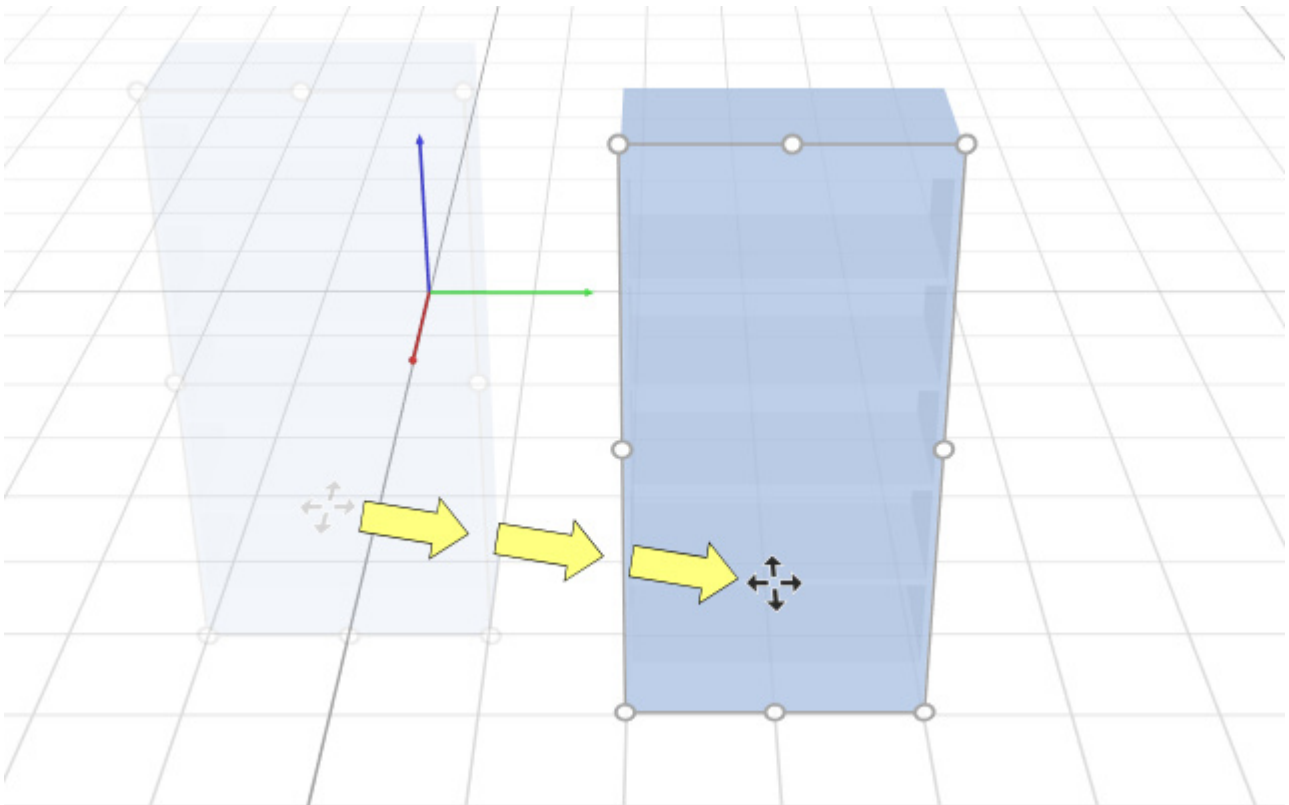
Note: You can also specify precise values. See Enter Bay Position.

Enter Bay Position

In Free Bays mode, you can position bays with precise values:

Position Y: the distance from the position 0 along the Y axis. The position 0 is shown by an indicator with the Y axis in green in your planogram when the Edit Bay tool is active.

Position Z: the distance from the position 0 along the Z axis (vertical distance from the ground). The position 0 is shown by an indicator with the Z axis in blue in your planogram when the Edit Bay tool is active.

Position X: the distance from the position 0 along the × axis. The position 0 is shown by an indicator with the × axis in red in your planogram when the Edit Bay tool is active.

Note: Each bay position is calculated from the lower back edge of the bay at the mid-point of its width.

See below an example of a bay placed at position 0, 0, -100 with the reference point and axis shown.
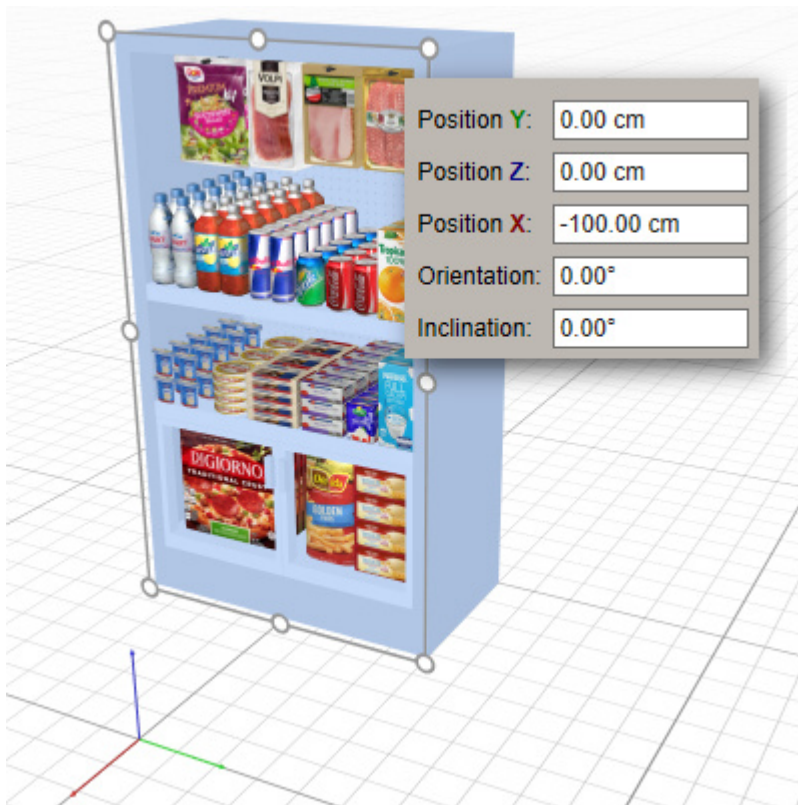
Tip: You can select several bays and apply common new values to these bays together.

Rotate Bays

Rotate Bays with Mouse

In Free Bays mode, you can rotate **bay(s)** with your mouse around the scene vertical axis:

1. Click on the **Rotate Bay** tool (or in the **Edit menu**, or **Context menu > Edit**).

2. **Select** the bay(s) to rotate by clicking on it (use *Ctrl+click* to select several bays).

3. **Press** the mouse button and **drag** your mouse to the left or right to rotate the bay.

4. **Release** the mouse button when the bay(s) has(have) the desired orientation.

Notes:

The rotation center is located at the center of the selected bay(s).

With the Grid *Off*, bays are rotated to 5 degree rounded orientation values.

With the Grid *On*, bays are rotated to 90 degree rounded orientation values.

To rotate the bay(s) completely freely, you can hold the space bar while rotating, producing a slower motion and preventing orientation rounding.

You can also specify precise values. See Enter Bay Orientation.

Enter Bay Orientation

In Free Bays mode, you can Specify Precise bay Orientation around the vertical axis and front / back inclination:

Selected Bay

Overall width:	102.20 cm		Position Y:	-350.00 cm
Overall height:	150.00 cm		Position Z:	0.00 cm
Overall depth:	41.00 cm		Position X:	
Name:			Orientation:	90.00°
Front image:		✕ Browse...	Inclination:	0.00°

Orientation sets the angle of the bay(s) in degrees around the vertical axis. A value of 0 is the default value and makes the bay face the screen in Default view.

Inclination sets the angle of the bay(s) is specified in degrees around the Y axis. A value of 0 is the default value and makes the bay vertical.

Tip: You can select several bays and apply common new values to these bays together. In this case, each bay is rotated around its respecive center. If you rather want to rotate multiple bays as a group around a common center, use the following method: Rotate Bays with Mouse.

Copy Bays

You can copy **bay(s)** with your mouse. This copies only the bay(s) without any products or accessory that may be on the existing bay(s).

1. Click on the **Edit Bay** tool (or keyboard shortcut **B**, or in the **Edit menu**, or in **Context menu > Edit**).

2. Select the bay(s) to copy (see Select Bays).

3. Hold the **Ctrl** keyboard key and press and hold the mouse button with the pointer over the selected bay(s) and move the mouse to the desired bay position.

4. Release the mouse button at the position you want the copies.

The way the bays are copied depends on the state of the Free Bays (Bay Placement Mode):

- With **Free Bays *Off***: The bay(s) is (are) placed at the closest position available next to another bay or between two bays, pushing the other bays to make space.

- With **Free Bays *On***: The bay(s) is (are) placed at the selected position on the ground. If there are one or more other bays at this position, they may overlap. For details on positioning the copied bays, see Move Bays and Rotate Bays.

Delete Bays

To remove **bay(s)** from your project:

1. Click on the **Edit Bay** tool (or keyboard shortcut **B**, or in the **Edit menu**, or in **Context menu > Edit**).
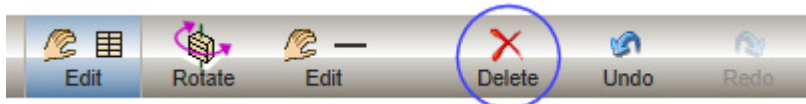
2. Select the bay(s) to delete (see Select Bays).

3. Press the **Delete** button or the **Delete** key on your keyboard (or the **Delete** command in the **Edit menu** or in the **Context menu > Edit**).

Add Bay Elements
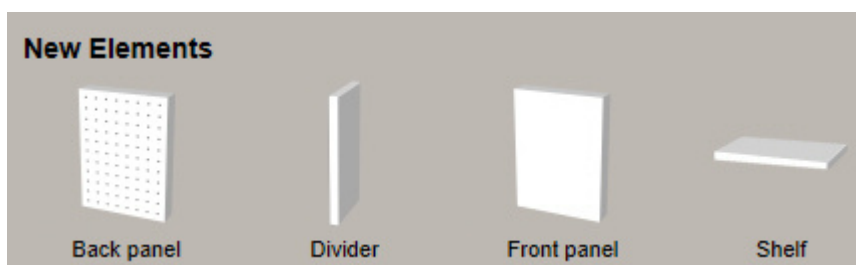
In **Modify Bay** task, under **New Elements**, you can add the following bay elements to any existing bay:

- Back panel: a fixture element onto which you can place pegged *products* and *accessories (panel)*. Drag it to the bay from the *New Elements* pane.

- Divider: a vertical separation to create pigeon holes or side panels. Products will not be allowed to cross this element if Collisions is ON for the bay element.

- Or drag this element and disable collisions on its properties to create any structural fixture element with no specific planogramming function, such as feet, posts, etc.

- Front Panel: a structural fixture element best used to represent front doors or other front panels in your bays. The advantage of this type of element is that it can be hidden in case you have products behind it (see Front Panel Visibility).

- By default front panels span the height and width of the bay and are positioned on the front of the bay.

- Shelf: a special fixture element onto which you can Add Products on Shelves and *accessories* such as *shelf strips* or *price tags*.

To add bay elements:

1. Make you have at least one bay in your planogram. Otherwise see Create Bay.

2. In **Modify Bay** task, drag new elements from the palette to the bay.

3. Change the properties of the bay elements if needed (see Bay Element Common Parameters).

---

4. Save your empty bay as a project if you wish to re-use it later.

Select Bay Elements

The **Edit Bay Element** tool lets you select elements and perform various operations such as editing the bay elements and their properties, or moving and copying elements.

To select bay element**(s)**:

1. Click on the **Edit Bay Element** button (or keyboard shortcut **S**, or in the **Edit menu**, or in the **Context menu > Edit**). Switching to the **Modify Bay** task also automatically activates this tool.

2. Select bay element(s):

3. To select one bay element, click on a bay element in the viewing area.

4. To select multiple bay elements: hold the *Ctrl* key while clicking on desired bay elements, or draw a rectangle with your mouse pointer across the desired elements.

5. The selected bay element(s) become(s) highlighted in blue and you can perform several tasks such as deleting, moving, changing dimensions, etc.

Note: some bay elements that have very different properties cannot be selected together.

Note: you can select multiple elements each belonging to different bays.

Note: Selecting a bay (bays) with the **Edit Bay** tool also selects all its (their) bay elements, allowing you to set common parameters for all elements in one shot, such as a common color for example.

Tip: To deselect the bay element(s), click in an empty area in the viewing area, or select another bay element.

Resize Bay Elements

Resize Bay Elements with Mouse

1. Click on the **Edit Bay Element** button (or keyboard shortcut **S**, or in the **Edit menu**, or in the **Context menu > Edit**). Switching to the **Modify Bay** task also automatically activates this tool.

2. Select the desired element(s). They (It) become(s) highlighted with round handles along the front-most surfaces.

3. If the round handles do not appear on the desired surface, use the Screen Navigation tools such as Orbit to make the desired surfaces face the screen.

4. Grab one of the handles with the mouse button and drag it until your element(s) reach the desired size(s). The corner handles let you resize in two directions, while the handles along edges let you constrain resizing to one direction.
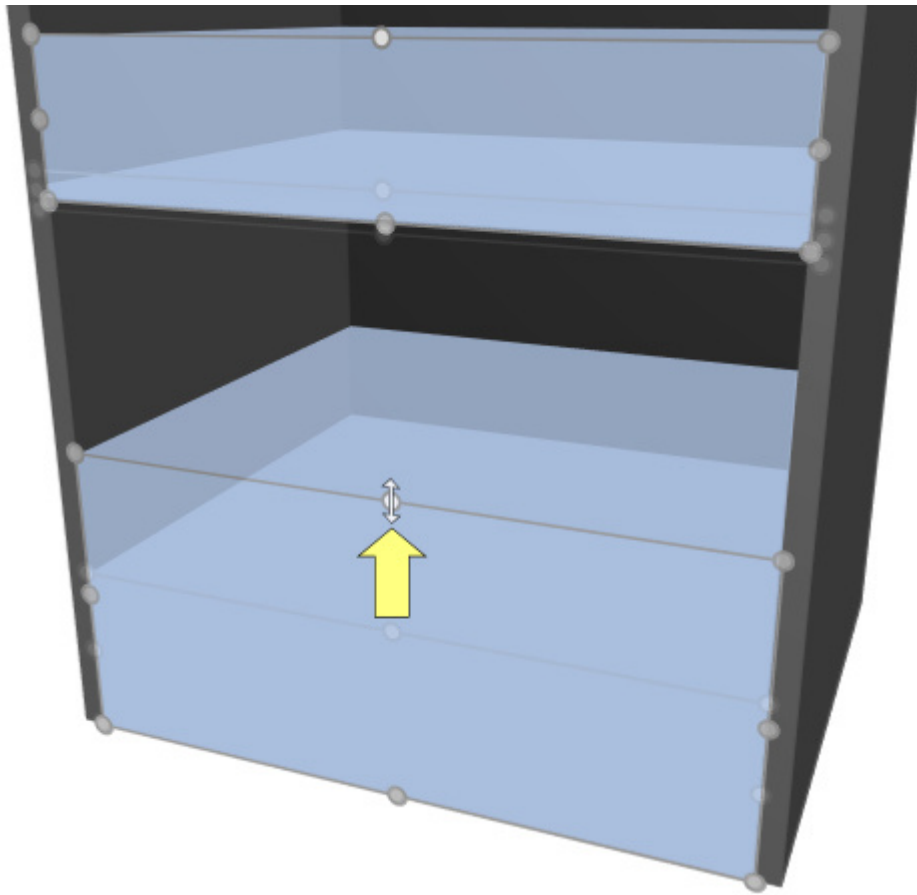
5. Release the mouse button.

Note: bay elements are normally resized to 1 cm or 0.5" rounded position values. To resize an element completely freely, you can hold the space bar while moving, producing a slower motion and preventing dimension rounding.

Tip: With Show Dimensions ON, you can display the dimensions of the resizing rectangle while resizing. This is useful if you know in advance the space to allocate to the bay(s).

126.18 cm

40.27 cm

42.2 cm

47.81 cm

148.28 cm
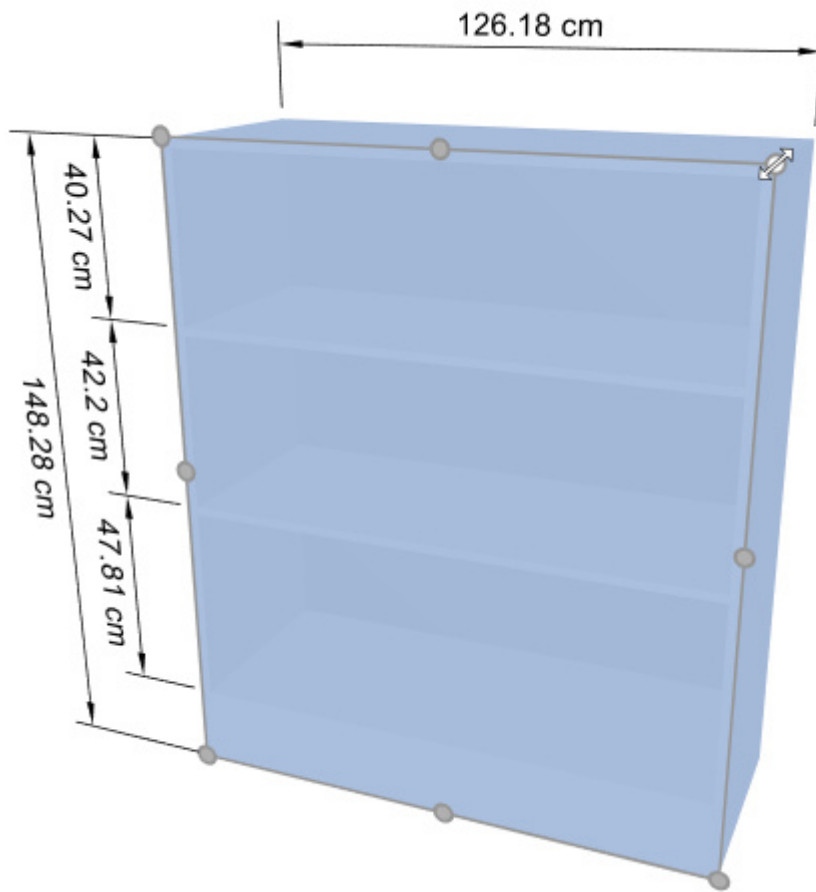
Tip: With Show Dimensions ON, you can also display the actual exact dimensions used by a bay by pressing on a handle of the desired bay.
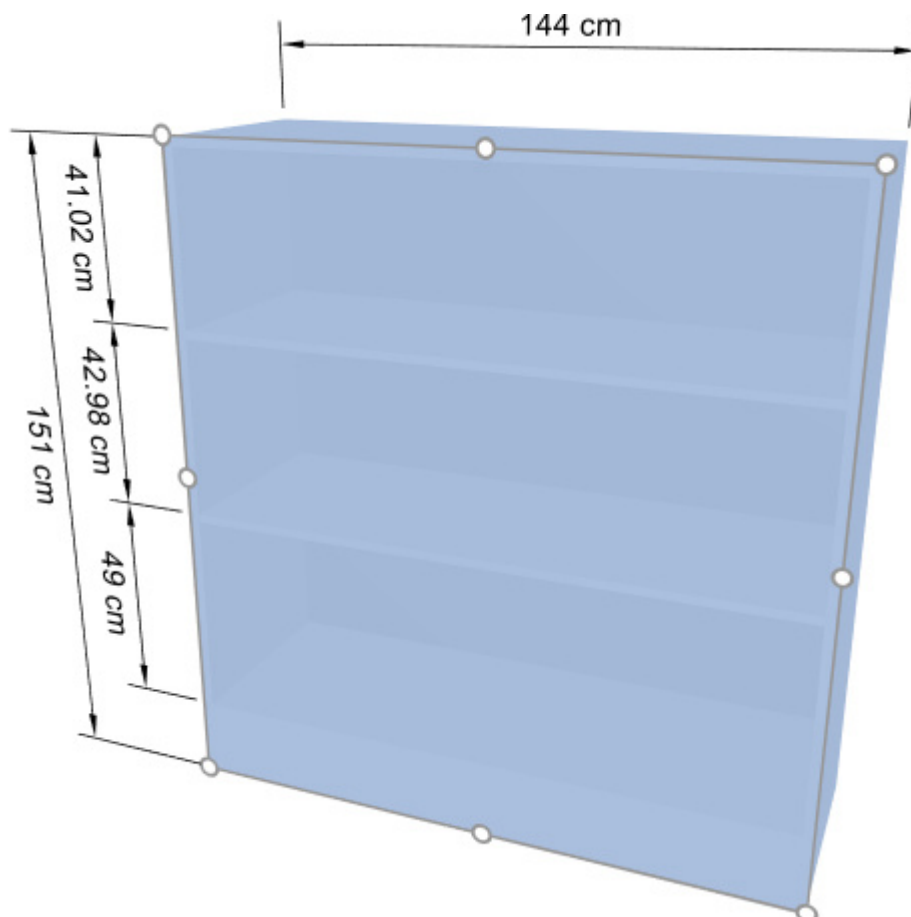
Note: handles are convenient for quick editing but you can also specify precise values. See Enter Bay Element Dimensions.

Enter Bay Element Dimensions

Width lets you set the overall width of the element.

Height specifies the height of the element.

Depth corresponds to the depth dimension of the element.

Move Bay Elements

Import Project   Templates   Room   Create Bay   Modify Bay   Products   Shelf Tools   Item Info   Publish   Analysis   Local Data   Database

Move Bay Elements with Mouse

You can move selected bay element(s) laterally or vertically with your mouse:

1. Click on the **Edit Bay Element** button (or keyboard shortcut **S**, or in the **Edit menu**, or in the **Context menu > Edit**). Switching to the **Modify Bay** task also automatically activates this tool.

2. **Select** the bay element(s). They (It) become(s) highlighted and a move pointer is displayed.

3. **Press and hold the mouse** button and move the mouse to the desired position. The displacement is constrained either vertically or laterally depending on your pointer position.

4. **Release the mouse** button when you are happy with the new position.
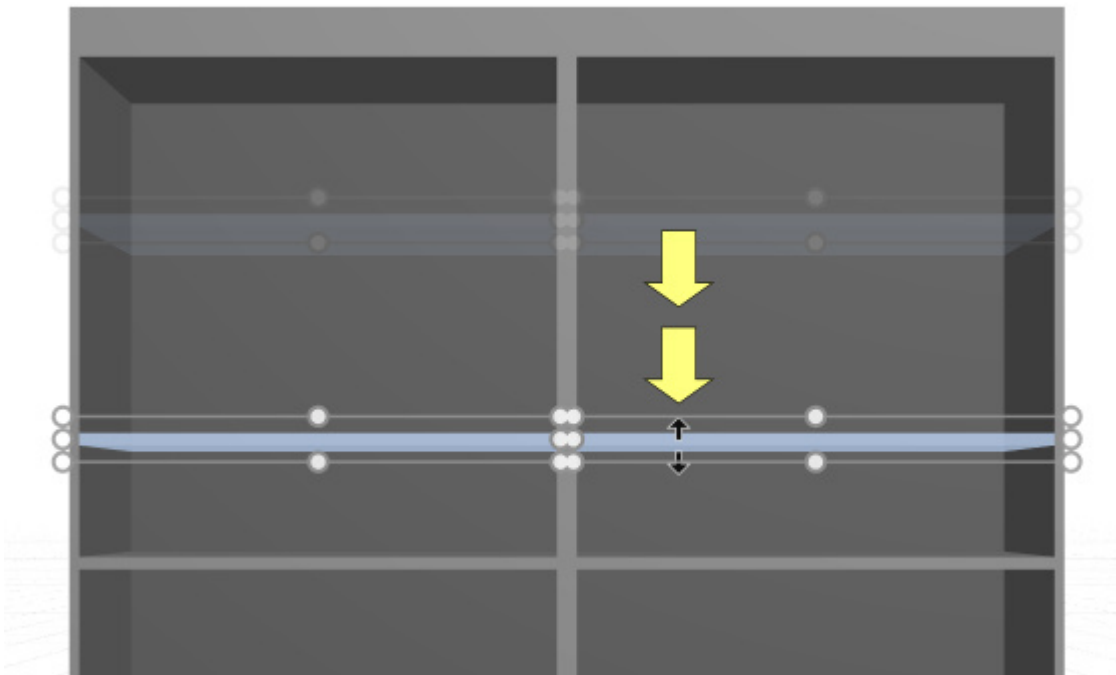
Note: bay elements are normally moved to 1 cm or 0.5" rounded position values. For example if you move a shelf up from an original distance from the ground of 141.2 cm, it will be repositioned at a rounded new distance from the ground (ex: 163.0 cm). To move an element completely freely, you can hold the space bar while moving, producing a slower motion and preventing position rounding.

Note: when you move shelves, there is no anti-collision to allow crossing other shelves even if there are products.

Note: you can also **specify precise values**. See Enter Bay Element Position.

Enter Bay Element Position

Selected [type of element]

Width:	2.00 cm	Lateral offset:	-20.51 cm
Height:	268.00 cm	Distance to bottom:	0.00 cm
Depth:	48.00 cm	Distance to back:	0.00 cm
Color:			
☐ Transparent			

Lateral offset is used to shift the element left or right. The distance is measured from the center of the bay origin (the theoretical center of the bay) to the center of the element. Negative offsets move the element to the left, positive offsets move it to the right.

Distance to bottom specifies the vertical distance from the bottom of the element to the bottom of the bay. Shelf elements are an exception for which the distance is measured from the top of the shelf, making it easier to specify the actual position of the shelf surface relative to the bottom of the bay (typically the floor).

Distance to back represents the distance from the back of the element to the bay origin (the theoretical rear of the bay).
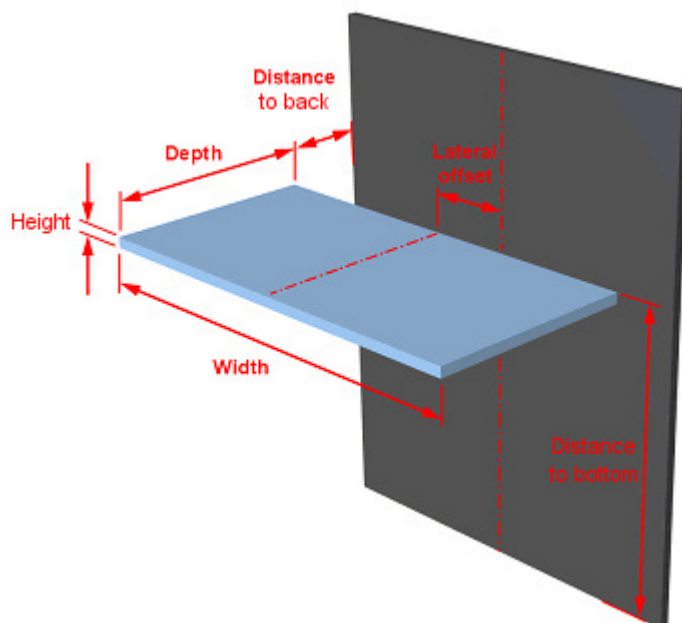
Ex: shelf position and dimensions

Space and Align Bay Elements

You can apply various spacing and alignment presets to a group of selected bay elements.

For example, you can select multiple shelves and space them all evenly vertically.

1. Click on the **Edit Bay Element** button (or keyboard shortcut **S**, or in the **Edit menu**, or in the **Context menu > Edit**). Switching to the **Modify Bay** task also automatically activates this tool.
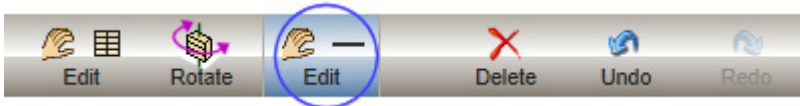
2. Select the desired bay elements.

3. Open the **Edit menu**.

4. Put your mouse cursor over **Align and Space**.

5. Select one of the commands below:

Align Left
Align Right
Align Top
Align Bottom
Space Horizontally
Space Vertically
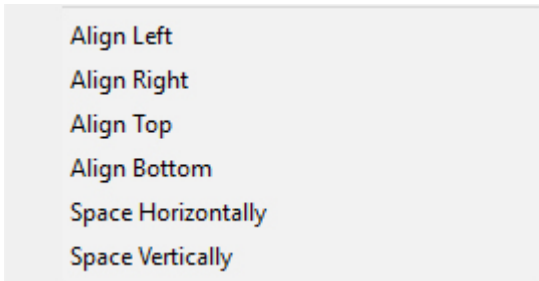
Each command redistributes the selected bay elements in space as per the command name.

Note: For reference, you can find some example images of the same commands applied to products in the section Align and Space Items.

Copy Bay Elements

Import Project Templates Room Create Bay **Modify Bay** Products Shelf Tools Item Info Publish Analysis Local Data Database
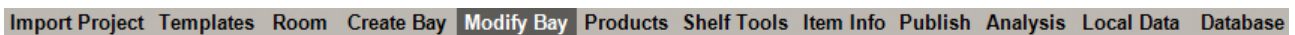
You can copy selected bay element(s) by dragging it (them) with your mouse to a new position.

1. Click on the **Edit Bay Element** button (or keyboard shortcut **S**, or in the **Edit menu**, or in the **Context menu > Edit**). Switching to the **Modify Bay** task also automatically activates this tool.

2. Select the bay element(s), press the mouse button while holding the Ctrl key and move the pointer to the desired position.

Note: Copying bay elements with your mouse is convenient for quickly duplicating shelves or other panels. You can later specify precise position values for each element by changing their parameters. See Enter Bay Element Position.

Note: *Back panels* and *side panels* element cannot be copied as their quantity is fixed for each bay. You can however add *dividers* to create elements similar to side panels.

Delete Bay Elements

Import Project Templates Room Create Bay **Modify Bay** Products Shelf Tools Item Info Publish Analysis Local Data Database
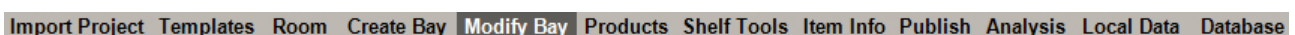
To remove one or more bay elements from a bay:

1. Click on the **Edit Bay Element** button (or keyboard shortcut **S**, or in the **Edit menu**, or in the **Context menu > Edit**). Switching to the **Modify Bay** task also automatically activates this tool.

2. **Select** the bay element(s) to delete.

3. Press the **Delete** button or the **Delete** key on your keyboard (or the **Delete** command in the **Edit menu**).
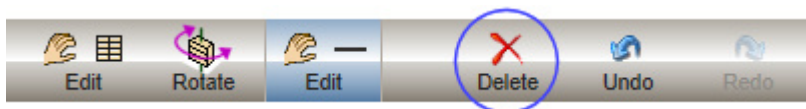
Bay and Element Parameters

Import Project Templates Room Create Bay Modify Bay Products Shelf Tools Item Info Publish Analysis Local Data Database

Bay Parameters

Import Project Templates Room Create Bay Modify Bay Products Shelf Tools Item Info Publish Analysis Local Data Database

You can set some parameters which apply to the whole selected bay(s).

Dimensions, orientation and position and are already described in the linked sections.

Bay Name

This lets you enter a descriptive text for the bay. The name can be listed in published reports and be displayed as a label on the bay in Schematic View.

Bay Front Image

For any Bay, one image can be displayed on the front face of the bay for a more realistic look.

To apply a picture to selected bay(s):

1. Next to **Front image**, press the **Browse** button and select an image file on your hard disk.

2. The image will only be displayed on elements of each respective bay that have **Selected "element" > Show front image** checked. The image is automatically stretched to fit the overall dimensions of the elements that have **Show Front image** checked.

Note: Any type of element can display the image.

Here is an example image and the resulting bay with the image applied to the base and the light box of the bay:
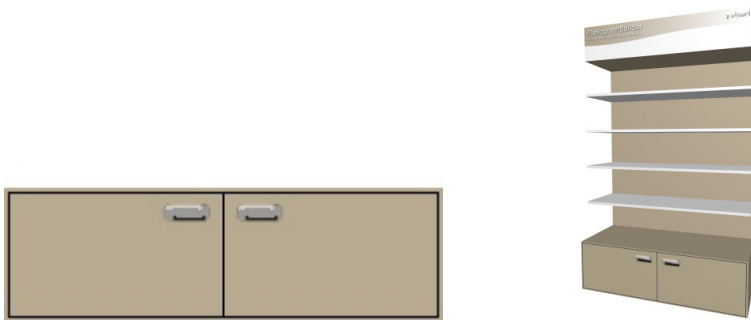
To remove a picture from a bay:

1. **Select** the desired bay(s) or its (their) bay element(s).
2. Press the **Clear** button (red cross) next to the image name.

Bay Flow Direction

For each bay you can optionally define and display its **flow direction**, hereby indicating which way people are most likely to travel in the aisle where the bay is located.

Defining the **flow direction** of a selected bay:

- to right: people walk from left to right of the bay seen from the front.
- to left: people walk from right to left of the bay seen from the front.
- undefined: the flow direction is not defined (default value).

Note: Refer to Show Flow Direction to learn how to display flow direction arrows on the screen.

Bay Locked Bay Elements

For each bay, it is possible to Bay Locked Bay Elements in order to prevent any modification to the bay.

The effect is as follows:

- The bay and its bay elements can still be selected, but their properties cannot be changed any more, except the parameters *Locked Bay Elements* and *Locked Accessories*.
- Existing bay elements cannot be moved with the mouse.
- Existing bay elements cannot be deleted from the bay.
- Bay elements cannot be added to the bay by dragging from the palette.

Note: If **Locked bay elements** is checked for a given bay, you will need to uncheck it if you wish to add or edit any bay element on this bay.

Note: The value of **Locked bay elements** is saved with the project for each bay.

Bay Locked Accessories

For each bay, it's possible to lock in place all the accessories that are already placed on the bay and to prevent adding any accessories to this bay.

Let's suppose you have created a bay with several accessories such as a bay header, panels and shelf strips. Locking the accessories will allow you to add and move products on the shelves without risking to displace the accessories at the same time.

Note: If **Locked accessories** is checked for a given bay, you will need to uncheck it if you wish to move any accessories on the bay.

Note: The value of **Locked accessories** is saved with the project for each bay.

Bay Element Common Parameters

All types of bay elements share some common parameters.

Dimensions and position are already described in the afore-linked sections.

The other common parameters are listed below.

Bay Element Color

Color allows setting the color of the element. Click on the rectangular color swap, and then choose a tint with the standard Color Dialog.

Bay Element Transparency

Transparent specifies whether the element is translucent or opaque.

Bay Element Front Image Display

Show front image determines if the bay front image is displayed on the front of the selected element(s). See Bay Front Image for details on assigning a bay image.

Bay Element Collisions

Collisions lets you choose if products and accessories should be blocked by the selected bay element(s) when they are moved against it. The *Collisions* setting has however no effect when moving bay elements against each other. bay elements can always overlap one another.

Tip: Check *Collisions* for elements which should act as a physical barrier for products, such as vertical separations.

Note: The bay element *Collisions* setting has no effect if the general Collisions parameter in *Settings* is disabled.

Shelf Parameters

Beside the Bay Element Common Parameters, shelves have some additional parameters described below.

Shelf Accept Items

Accept items defines whether you can place items on the selected shelf (shelves).

Shelf Lateral Overhang

Allow lateral overhang determines if products and accessories can overhang the side edges of the shelves.

- Unchecked: items cannot extend past the lateral edges of the bay element.
- Checked: items can extend past the lateral edges of the bay element, but only by maximum half the item width.

Tip: check this so your products can overlap on adjacent shelves, even on separate bays.

Shelf Behind Products

Note: This parameter only applies to *PlanogramBuilder Light* version.

Checking **Behind products** moves the selected shelf behind products that are positioned on lower shelves.
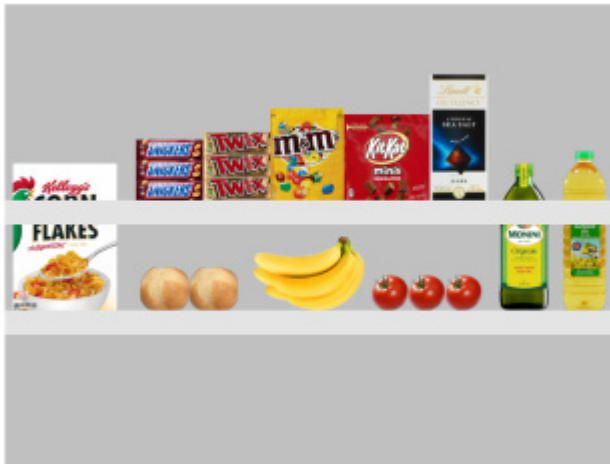
Behind products OFF   *Behind products ON*
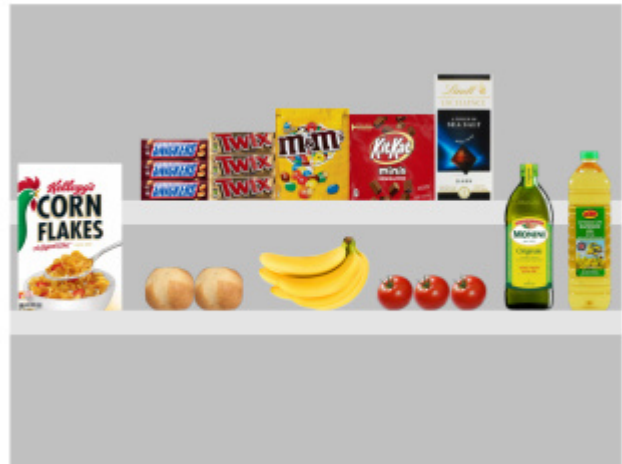
Shelf Margins

Margins define limits of the inner area of the shelf onto which items can be placed.

Left margin sets a distance from the left edge of the shelf beyond which products cannot be placed.

Ex: The default value of 0 lets you place products on the whole width of the shelf.

Ex: A value of 8 lets you place products on the whole shelf except on the last 8 mm/cm/inches on the left part of the shelf.

Right margin sets a distance from the right edge of the shelf beyond which products cannot be placed. The principle is the same as for the left margin.

Front margin sets how far products will be placed from the front edge of the shelf. *Tip*: A front margin is ideal to leave a space for placing products with the tester behavior (see Product Behaviors).
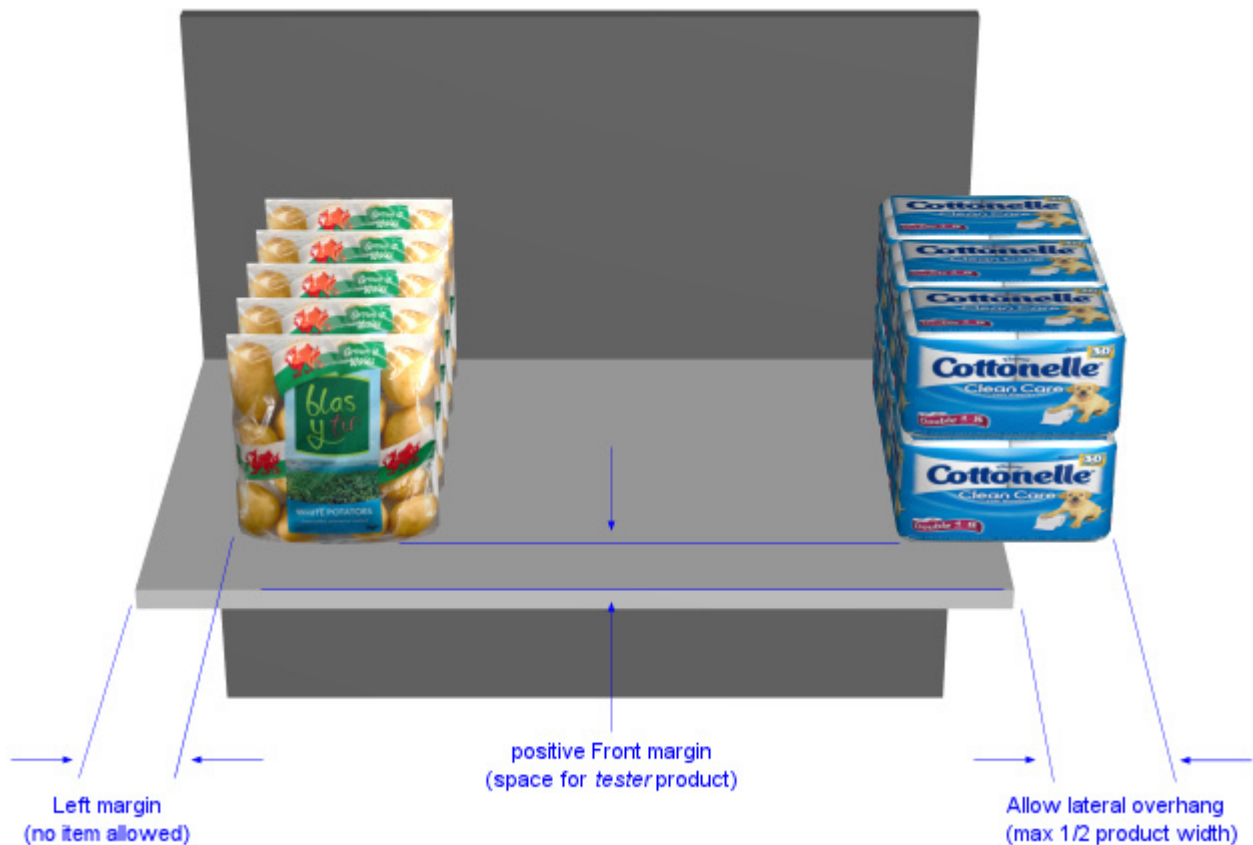
Shelf margins and lateral overhang

Shelf Inclination

Inclination enables tilting the shelf at the specified angle measured from its horizontal position. All products on the shelf will also be rotated.

Shelf Max. Facings Wide

Max. facings wide specifies a limit for the maximum number of products that can be placed along the width of the shelf (the facings in width). If you leave the default value "-", you can place as many products as you wish.

Shelf Gap to Shelf Below

Gap to shelf below can be used to specify the vertical space between shelves. This is convenient to ensure enough vertical space based on your product heights. Entering a value for this parameter overwrites the *Distance to bottom* value. This parameter is not available for the lowest shelf of a bay.

Back Panel Parameters

Selected Back Panel

Width:	100.00 cm	Lateral offset:	0.00 cm
Height:	200.00 cm	Distance to bottom:	0.00 cm
Depth:	2.00 cm	Distance to back:	-2.00 cm
Color:		Left margin:	5.00 cm
☐ Transparent		Right margin:	5.00 cm
☐ Show front image		Bottom margin:	40.00 cm
☐ Collisions		Top margin:	5.00 cm

Type: ○ Solid
        ◉ Pegboard
        ○ Slatwall

☑ Accept items
☐ Allow lateral overhang

☑ Show holes / slats

Horizontal step:	2.54 cm
Vertical step:	2.54 cm
Hook length:	30.00 cm

Beside the Bay Element Common Parameters, back panels have some additional parameters:

Back Panel Accept Items

Accept items defines whether you can place items on the selected back panel.

Back Panel Lateral Overhang

Allow lateral overhang determines if products and accessories can overhang the side edges of the selected back panel(s).

- Unchecked: items cannot extend past the lateral edges of the panel.
- Checked: items can extend past the lateral edges of the panel, but only by maximum half the item width.

Tip: check this so your products can overlap on adjacent back panels, even on separate bays.

Back panel Margins

Margins define limits of the inner area of the back panel onto which items can be placed.

The **margins** have different effects depending on the type of panel:

- On Solid type back panels, the margins define the limits of the area which accepts items (shown as a dashed rectangle below). Items are constrained horizontally by the margins (unless Allow lateral overhang is checked), while vertically half of the item height is allowed to overflow the margin:
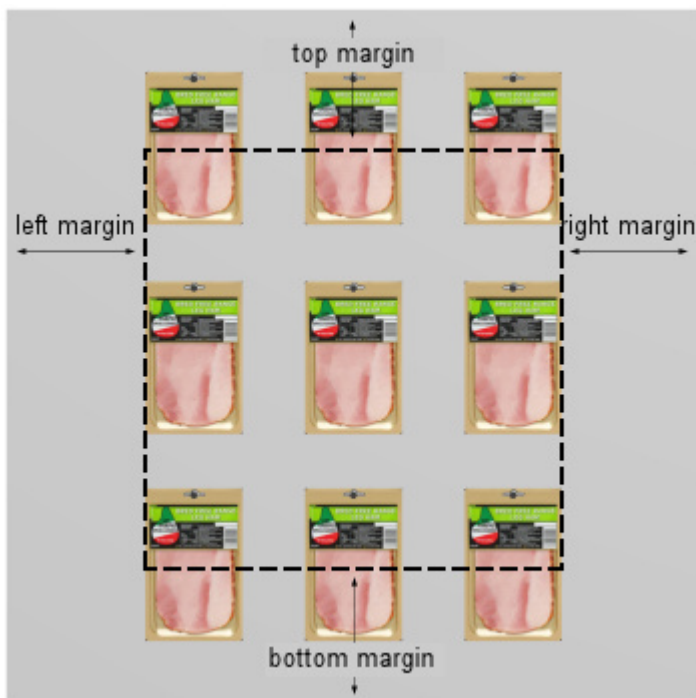
- On Pegboard and Slatwall type back panels, the margins define the limits of the area with peg holes or slats. Items can use all available peg holes or slat area (as visible with Show holes / slats enabled). Items are constrained horizontally by the back panel lateral edges (unless Allow lateral overhang is checked), but are not constrained vertically and can overhang above and below the back panel (as in the patato bag below).
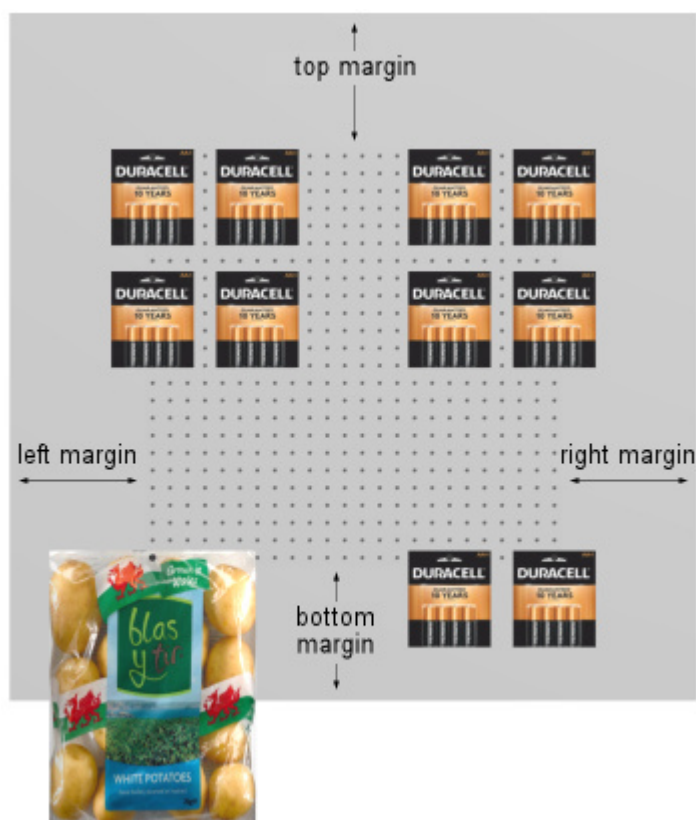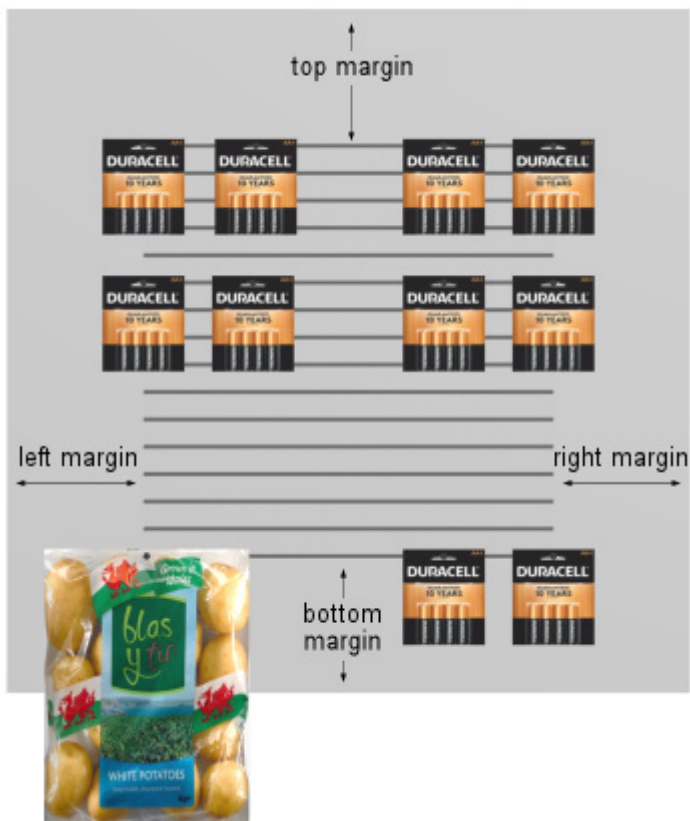
Back Panel Type

Type lets you choose various back panel styles.

- Solid makes the back panel a plain surface. This means pegged products can be placed and moved freely on the back panel with no constraints. (Default value for new bays)

- Pegboard turns the back panel into a pegboard. Pegged products will snap to the position of the peg holes on the back panel. By default, products are centered horizontally with the top edge aligned vertically to the peg hole. It is however possible to offset the product from the peg hole in the database or under Item Info.

- Slatwall makes pegged products snap to the slats vertically, but still to be positioned freely horizontally.

Depending on the type of panel, different options are available.

Pegboard example

Slatwall example

Back Panel Show holes / slats

Show holes / slats toggles the visibility of the peg holes or slats on the back panel. Note that *Show front image* must be unchecked to enable this parameter.

Back Panel Horizontal step

Horizontal step applies to *pegboards* only. It defines the horizontal distance between holes on the pegboard. It acts as a snap grid increment to place pegged products.

Back Panel Vertical step

Vertical step applies to *pegboards* and *slatwalls* only. It is the vertical distance between holes or slats on the back panel. It determines the snap grid increment to hang products.

Back Panel Hook length

Hook length specifies the distance from the back panel to the tip of hooks. The actual hooks are invisible in PlanogramBuilder, but their specified length is used to determine how many times each product is repeated in depth, along the imaginary hook.

Note: By default, the actual pegs are displayed in PlanogramBuilder. To toggle visibility of the hooks, see Show Peg Hooks.

Products and Accessories

Import Project Templates Room Create Bay Modify Bay **Products** Shelf Tools Item Info Publish Analysis Local Data Database

Import Project Templates Room Create Bay Modify Bay Products **Shelf Tools** Item Info Publish Analysis Local Data Database

Import Project Templates Room Create Bay Modify Bay Products Shelf Tools **Item Info** Publish Analysis Local Data Database

In this section you will learn how to place *products* and *accessories* in planograms.

Note: This topic covers three different tasks, **Products**, **Accessories** and **Item Info**. The functioning is very similar so we are grouping them in a single topic. In this chapter, we refer to *products* and *accessories* as ***item(s)*** whenever a topic applies to both types of items.

Note: You must first add your own items to the database to start planogramming. If you are just starting using PlanogramBuilder, only sample items are available. Please see Database (Products, Accessories, Materials) to find out how to add your products and accessories to the database.

Tip: If you have *room elements* in your project, you may want to hide them while working with products so the walls are not blocking the view of shelving. See Room Visibility.

Item Editing Options

Import Project Templates Room Create Bay Modify Bay **Products** Shelf Tools Item Info Publish Analysis Local Data Database

Import Project Templates Room Create Bay Modify Bay Products **Shelf Tools** Item Info Publish Analysis Local Data Database

Import Project Templates Room Create Bay Modify Bay Products Shelf Tools **Item Info** Publish Analysis Local Data Database

This section lists the options which affect the way products and accessories are placed and moved while planogramming.

Collisions

Collisions (or collision detection) mimic the real world by detecting and preventing any overlap between objects. With collisions activated, the following occurs when you drag, move or copy an item and position it:

- If the desired item position **overlaps another item**, the item you are positioning can collide with the other item and push it automatically to make space if there is, or it can be blocked by the other item if there is no room to push it further.

- If the desired item position **overlaps a bay element**, the item you are positioning can collide and be blocked by the bay element automatically.

The collision feature can be enabled or disabled at various levels depending on your needs and preferences:

Collisions Main setting

You can disable collisions altogether if you prefer to be able to place products and accessories totally freely and let them overlap other items and bay elements when desired. This setting is per user and is remembered across sessions:

1. Click on **Settings**.

---

2. Under **Settings affecting the current user only**, **Viewing & Editing**, next to **Collisions**, check or uncheck the checkbox to enable or disable collisions.
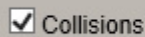
☑ Collisions

3. Now close the settings and try to push a product against another one or against a *divider* bay element to see how they behave depending on the **Collisions** setting.

Collisions per Database Item

Import Project Templates Room Create Bay Modify Bay Products Shelf Tools Item Info Publish Analysis Local Data **Database**

Note: This setting is only available to PlanogramBuilder Administrators.

You can disable collisions permanently for specific products and accessories. This is useful when only some items must always be allowed to overlap other items.

In *Database > Selected item > Item Details*, check or uncheck the *Collisions* parameter. See the **Collisions** property in the Database Item Properties for details.

Click on *Update* or *Create* to save the *Collisions* value for this item.

Note: You can also set this value to **yes** or **no** upon importing items. See Batch Import Database Items.

Collisions per Facing

Import Project Templates Room Create Bay Modify Bay Products Shelf Tools **Item Info** Publish Analysis Local Data Database

1. Select the items you want o change the collisions value.

2. In *Item Info* task, check or uncheck *Collisions*. See Item Info.

Toggling collisions against specific bay elements

Import Project Templates Room Create Bay **Modify Bay** Products Shelf Tools Item Info Publish Analysis Local Data Database

- Check the *Collisions* parameter for any specific bay elements to prevent products from overlapping them. See Bay Element Collisions.

Collisions Override

You can disable all collisions temporarily while placing products and accessories to avoid moving other items or being blocked inadvertently. This is typically useful when the item you are moving crosses other items or bay elements on its way to another location on the bay.

- Press the **C** keyboard key when Move Items to temporarily disable collision detection.

Tip: If you disable collisions, you may find it useful to highlight items that are overlapping. See Highlight Overlapping Items.

Auto-Snap

When you drag, move or copy an item on a shelf close enough to another item, it will automatically be re-positioned to touch the other item.

Similarly, when you position an item close to the side edge of a shelf, the item will automatically be re-positioned precisely at the edge of the shelf.

The threshold for an item to snap to nearby items and to shelf edges can be specified in the Settings:

1. Click on **Settings**.

2. Under **Settings affecting the current user only**, **Viewing & Editing**, next to **Auto snap distance**, type the threshold distance value for items to snap together.

3. Now close the settings and try to move some products near each other to see how they behave.
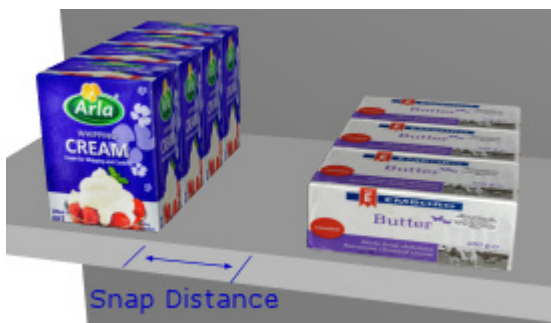
Example 1 above: If you set the distance to 4cm, a product placed further than 4cm away from another product will stay where you place it.
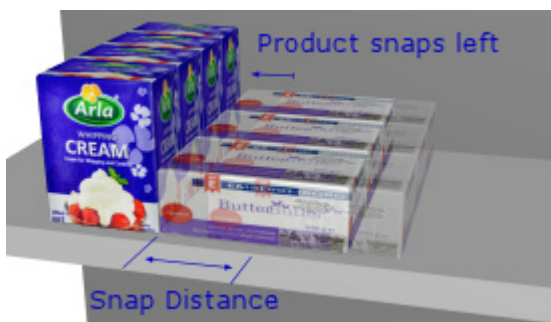
Example 2 above: If you set the distance to 4cm, a product placed closer than 4cm away from another product will jump and snap adjacent to that product.

Example 3 above: If you set the distance to 4cm, a product placed closer than 4cm away from the lateral edge of a shelf will jump and snap aligned to the shelf lateral edge.

Note: Auto-Snap only affects products and accessories that are sitting on shelves. Pegged items don't snap together.

Tip: **If you want to be able to place products very close to each other without snapping them together, enter a value of *0* in the setting.**

Item Dimension Lines

You can display the dimensions of any selected item. See Dimension Lines.

Item Catalogs

| Import Project | Templates | Room | Create Bay | Modify Bay | Products | Shelf Tools | Item Info | Publish | Analysis | Local Data | Database |

| Import Project | Templates | Room | Create Bay | Modify Bay | Products | Shelf Tools | Item Info | Publish | Analysis | Local Data | Database |

Product Catalog

| Import Project | Templates | Room | Create Bay | Modify Bay | Products | Shelf Tools | Item Info | Publish | Analysis | Local Data | Database |

Select the **Products** task. Here you can access all the products that are in your database.

Each product is represented by a thumbnail and a text description.
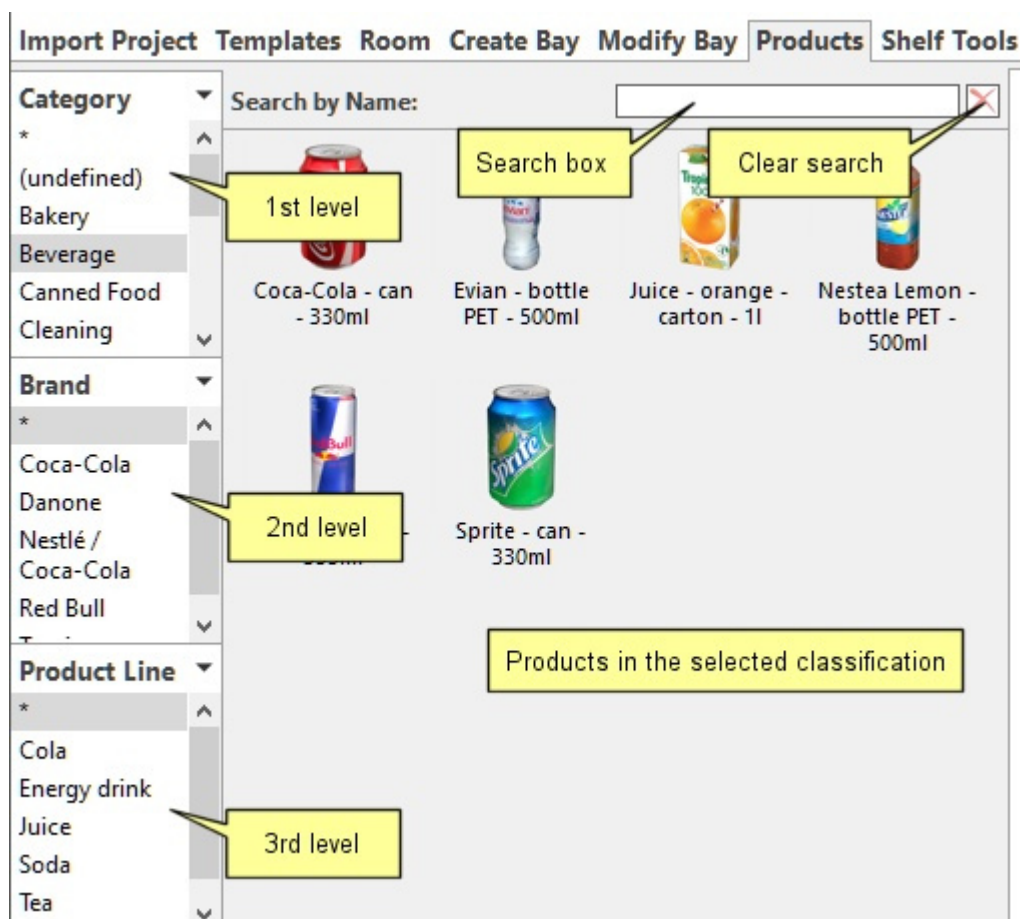
Important Note: **You must first add your own Products to your database to start planogramming. If you are just starting using PlanogramBuilder, only sample items**

are available. Please see Database (Products, Accessories, Materials) **to find out how to add your products to the database.**

Accessory Catalog

`Import Project  Templates  Room  Create Bay  Modify Bay  Products  Shelf Tools  Item Info  Publish  Analysis  Local Data  Database`

Select the **Accessories** task. Here you can access all the props and accessories that are in your database. These can be for example bay headers, banners, shelf strips, custom POS, etc.

Important Note: **You must first add your own accessories to the database to put them in planograms. If you are just starting using PlanogramBuilder, only sample accessories may be available. Please see** Database (Products, Accessories, Materials) **to find out how to add your accessories to your database.**

Find Items by Classification

`Import Project  Templates  Room  Create Bay  Modify Bay  Products  Shelf Tools  Item Info  Publish  Analysis  Local Data  Database`

`Import Project  Templates  Room  Create Bay  Modify Bay  Products  Shelf Tools  Item Info  Publish  Analysis  Local Data  Database`

On the left side of the screen, your products are listed in a hierarchical menu with 3 levels, each corresponding to a classification criterion. Clicking on the hierarchy on the left filters the products in the catalog on the right side.

When you select an item in the 1st level of the hierarchy, only the items matching your choice are shown at the 2nd level, and so on for the 3rd level.

Note: products with empty values for a given level in the hierarchy are shown in the (undefined) group this classification level.

Tip: You can display all items for any of the classification level by selecting the "*****" symbol.

Tip: Navigate in the classification list with the keyboard:

- Move up/down in the list content with the Up/Down arrow keys.
- Move down in the classification levels with the Tab key.
- Move up in the classification levels with the Shift+Tab key combination.

Find Items by Text

`Import Project  Templates  Room  Create Bay  Modify Bay  Products  Shelf Tools  Item Info  Publish  Analysis  Local Data  Database`

`Import Project  Templates  Room  Create Bay  Modify Bay  Products  Shelf Tools  Item Info  Publish  Analysis  Local Data  Database`

Just above the catalog thumbnails, you can type some text to search and display matching products. When using this method, the hierarchy will be disabled and PlanogramBuilder will look in your entire database to find products matching the text you entered. The search box accepts single or multiple keywords following these rules:

- Multiple keywords must be separated by spaces
- All keywords must be present
- Keywords are not case sensitive
- The order of keywords doesn't matter

Example: typing *frozen CHOCOLATE* in the **Search by Name** box will display all the products containing *chocolate* AND *frozen* in their name.

To get back to the classification method, you can clear the search box with the **Clear** button.

Note: The search function is labeled and applies your text search according to the current type of thumbnail captions. Ex: if you have set your captions to show the product **name** and **reference**, the search will look for your text string in the list of product names and references.

Catalog Captions and Search

The text description below each thumbnail can be set to be any combination of the following item properties: its name, reference, and/or any of the custom properties value as defined in the database.

To set which property (ies) is (are) displayed below the thumbnails:

1. Click **Settings**

2. Under **Product & Accessory Catalogs**, **Captions & search**, check your preferred description, as shown below.
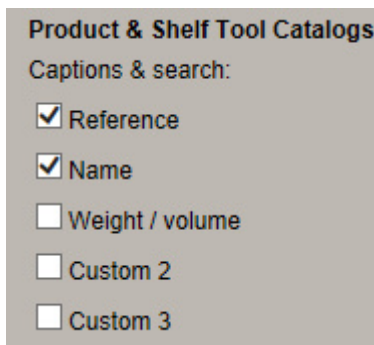
Note: This setting doesn't apply to the Template catalog, which always shows project names.

Add Items

This section describes how to place new products, accessories and generic products in a planogram.

Add Products on Shelves
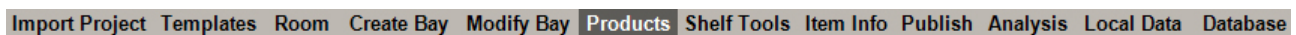
To place a product defined with the ***standard, stacked or tester*** product behavior on a shelf**:**

1. Activate the **Edit Item** tool by choosing the **Products task** (or keyboard shortcut **I**, or in **Edit menu** or in **Context menu > Edit**).

2. **Position the mouse pointer** over on an item in the catalog.

3. **Hold the mouse button down and drag** the item to a shelf in your planogram.

4. **Release the mouse button** once you have reached the desired position. The item is placed on the shelf.

5. Once a product has been placed in your planogram, its thumbnail background changes to a lighter color in the catalog, helping you identify already used products.

Product already placed in
current planogram project
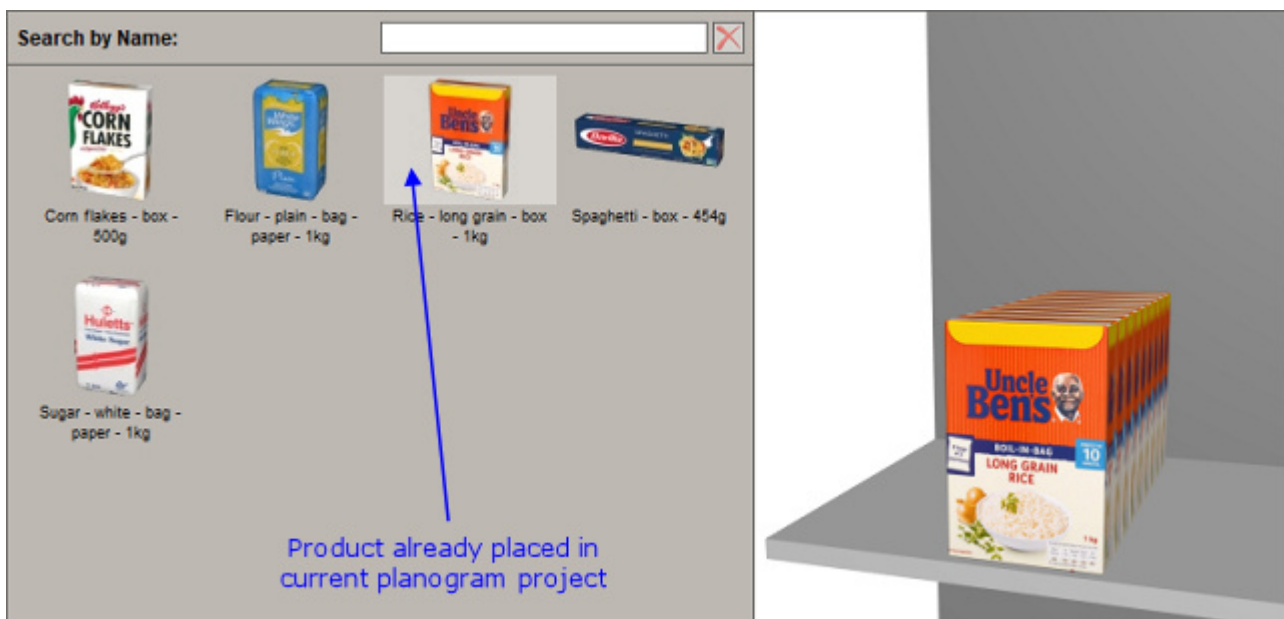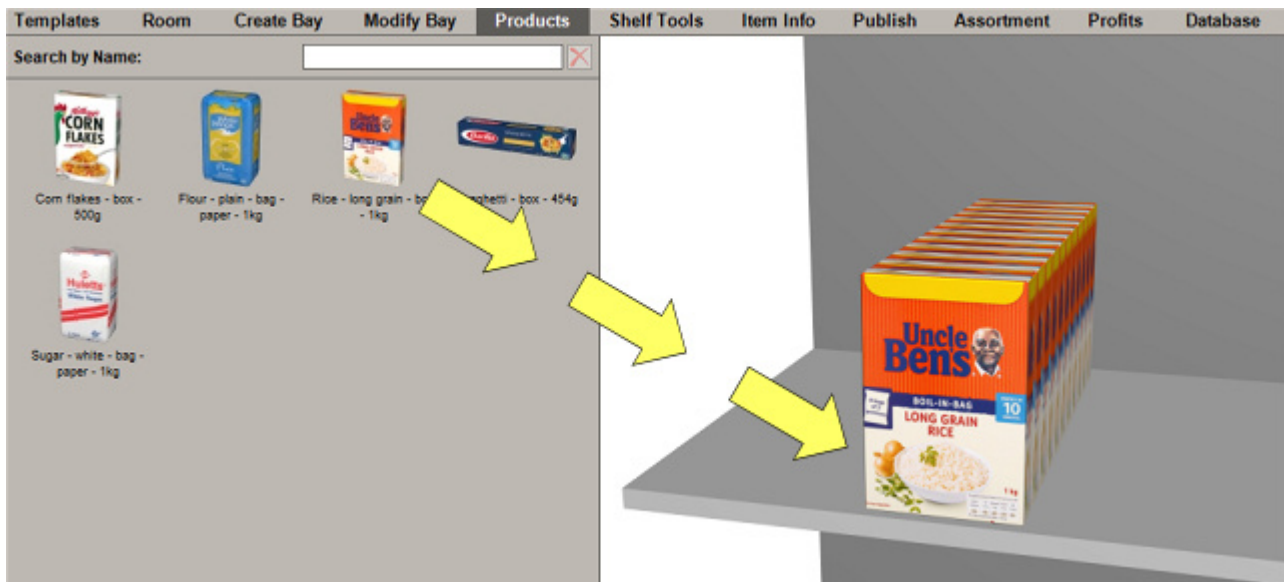
When you place a *product* with the *standard* or *stacked* behavior, PlanogramBuilder automatically places as many *facings deep* as possible on the shelf depth, unless you have predefined a fixed number of *facings deep* in the database for the item (see Database Item Properties).

Only one *facing wide* and one *facing high* is placed by default.

After placing the item, you can change the number of facings with your *mouse*, *keyboard* or precise values. See Change Product Facing Count.

Products with the *tester* behavior are placed as single facings at the shelf front margin in front of other products.

Note: If there is no back panel on your bay, make sure to position your mouse cursor exactly on a shelf when you release the product, otherwise the product won't be placed on the shelf.

Tip: You can add more than once the same object in a single drag & drop operation. While maintaining the left mouse button pressed, each time the mouse cursor is over a target location click with the right mouse button (press and release). *Important note*: this method

does not create a block with multiple front facings, but it adds instead each product as a separate single facing. To create block of multiple adjacent facings of the same product, see instead Change Product Facing Count.

Tip: Although the automatic collision feature is convenient, there are times when you may want to disable collisions. Please see Collisions for details.

Tip: When you add only products on shelves, you can lock accessories in place to prevent accidentally moving existing accessories. See Bay Locked Accessories.

Tip: Products defined in the database with the **pegged** behavior are normally positioned automatically on pegs and will not sit on shelves. However, you can override the standard behavior and force a product to be sitting on a shelf by doing one of the following:

- **To add a product from the catalog**, *Shift+drag* the product from the catalog to the bay. You will be able to drop the product anywhere on a shelf.

- **For product(s) already in your project** and hanging on pegs, select the product(s), then change their **product behavior to** Standard in the Item Info task.
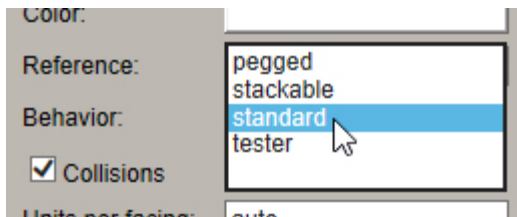
Tip: you can set this property for several products in one click with Select Multiple Items.

Tip: If you have *room elements* in your project, you may want to hide them while working with products so the walls are not blocking the view of shelving. See Room Visibility.

Add Products on Pegs

To place a product with the ***pegged*** Product Behavior on a back panel:

1. Activate the **Edit Item** tool by choosing the **Products task** (or keyboard shortcut **I**, or in **Edit menu** or in **Context menu > Edit**).

2. **Position the mouse pointer** over on an item in the catalog.

3. **Hold the mouse button down and drag** the item to a back panel in your planogram.

4. **Release the mouse button** once you have reached the desired position. The item is placed on the back panel.

5. Once a product has been placed in your planogram, its thumbnail background changes to a lighter color in the catalog, helping you identify already used products.
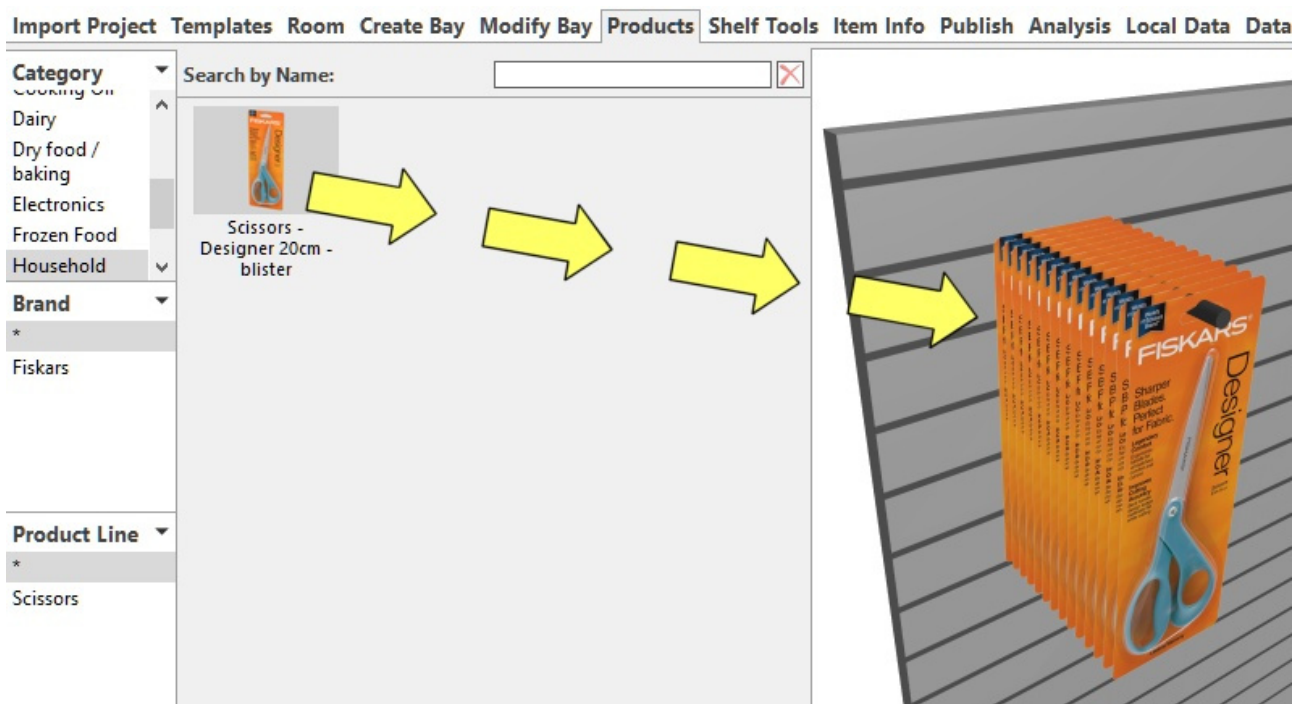
When you place a *product* on peg, PlanogramBuilder automatically places as many *facings deep* as possible on the hook length, unless you have predefined a fixed number of *facings deep* in the database for the item (see Database Item Properties).

After placing the item, you can change the number of facings with your *mouse*, *keyboard* or precise values. See Change Product Facing Count.

Tip: Products saved in the database with the *standard, stacked* or *tester* behavior can still be forced to hang to pegs by doing one of the following:

- **To add a product from the catalog**, *Shift+drag* the product from the catalog to the bay. You will be able to drop the product anywhere on a back panel.

- **For a product already in your project** and resting on a shelf, select the product(s), then change their **product behavior to** Pegged in the Item Info task.
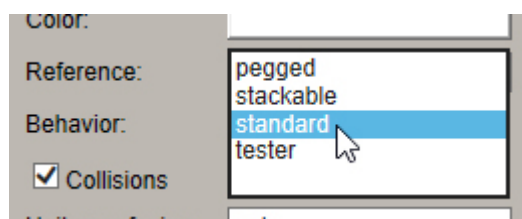
Tip: you can set the behavior for several products in one click with Select Multiple Items.

Note: By default, the actual pegs are displayed in PlanogramBuilder. To toggle visibility of the hooks, see Show Peg Hooks.

Tip: When you want to work only with products, you can lock accessories in place to prevent accidentally moving existing accessories. See Bay Locked Accessories.

Tip: If you have *room elements* in your project, you may want to hide them while working with products so the walls are not blocking the view of shelving. See Room Visibility.

Add Generic Products
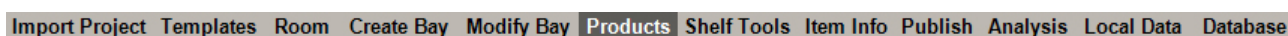
Sometimes, you may need to include in your planograms some products that are not available in PlanogramBuilder database, such as seldom used competitors' products. In this case, PlanogramBuilder lets you create your own 3D generic products:

1. In the **Products** task, click on the **Add** button.

2. Place your mouse cursor over the area of a shelf where you want to add your new product.

3. Click the left mouse button to confirm and create the generic product.
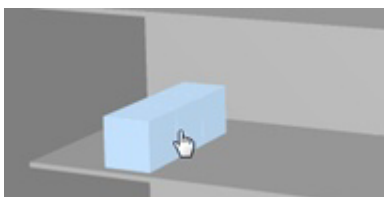
Generic products are always presented as simple **boxes with no image**.

Generic products have default **parameter values** upon creation. You can change their values after item creation in the Item Info task, for example the item *name*, *dimensions*, the number of *facings* or the *behavior* if you want to peg generic products.

Note: Generic products are only saved in your current project, but not in the database. If you wish to add products to the database (so that they are shown in the catalog), please see Database (Products, Accessories, Materials) for detailed instructions.

Tip: If you copy a generic product, it creates a new independent generic product which can then be edited to have different characteristics such as dimensions, name, etc. (see Copy Items).

keyboard shortcut: **N**

Menu item: **Edit menu > Add Generic Product**

Generic Product Label

In standard view a text label is displayed on the front showing the name of the product if has been defined. In schematic view, the label can show different information depending on the settings.

You can also specify *font* for all the labels of *generic products*:

1. click **Settings** on the upper toolbar:

2. Set the options under **Schematic View / Generic Products / Dimensions**:

Font face
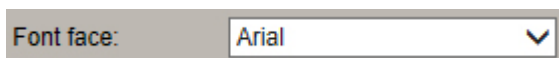
This sets the typeface for the text labels. It also applies to text in dimensions, schematic view and on products in the database that use the box shape without picture.

Font height

Font height:	2.00 cm

This sets the text size for labels. It may be necessary to use a smaller text size if your product labels cannot be displayed fully with the default text size.

You can also fine-tune the font size interactively by selecting Font Size from the Display menu. With this tool, move your mouse left/right or up/down to change the font size. While the tool is active, you can click on the viewing area to reset the default value.

Add Accessories on Bays

Import Project Templates Room Create Bay Modify Bay Products **Shelf Tools** Item Info Publish Analysis Local Data Database

It is very simple and straightforward to put products and accessories on their fixtures

To place a accessory on a bay:

1. Activate the **Edit Item** tool by choosing the **Products task** (or keyboard shortcut **I**, or in **Edit menu** or in **Context menu > Edit**).

2. **Position the mouse pointer** over on an item in the catalog.

3. **Hold the mouse button down and drag** the item to a bay in your planogram.

4. **Release the mouse button** once you have reached the desired position. The item is placed on the bay.

5. Once a accessory has been placed in your planogram, its thumbnail background changes to a lighter color in the catalog, helping you identify already used products.

When you put a *accessory*, it is placed according to its *behavior*. For example, a *bay header* is placed at the top of the bay, while a *shelf strip* is placed at the front edge of a shelf. See Accessory Behaviors for reference on all available *accessory* types.
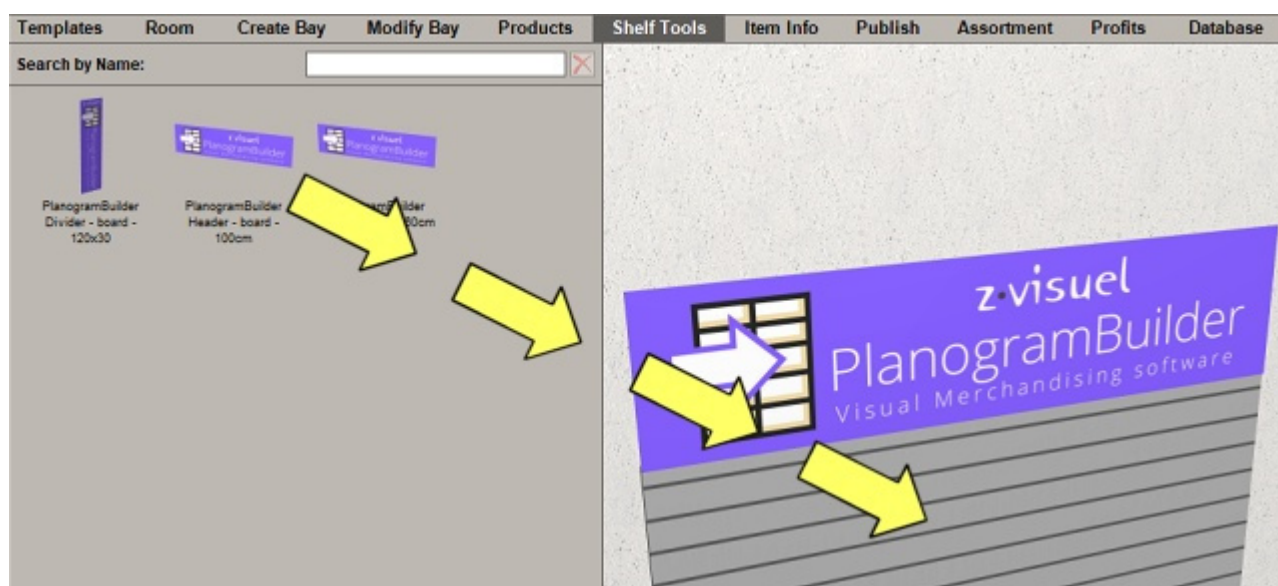
Tip: You can add more than once the same object in a single drag & drop operation: while maintaining the left mouse button pressed, each time the mouse cursor is over a target location click with the right mouse button (press and release).

Tip: Although the automatic collision feature is convenient, there are times when you may want to disable collisions. Please see Collisions for details.

Tip: If you have *room elements* in your project, you may want to hide them while working with *accessories* so the walls are not blocking the view of bays. See Room Visibility.

Select Items

In *Products* and *accessories* mode, you can select single or multiple objects to perform tasks on a group of objects in one operation.

Select One Item

1. Activate the **Edit Item** tool by choosing the **Products task** (or keyboard shortcut **I**, or in **Edit menu** or in **Context menu > Edit**).

2. Click on the desired item in the viewing area.

3. The selected item is tinted in blue.

Select Multiple Items

There are 4 methods available:

Control + Click

1. Select one or more item(s) (see Select Items).

2. Hold the keyboard **Ctrl** key down.

3. Select additional objects by clicking on each of them.

4. The selected objects become highlighted in blue and you can perform operations on the selected group, such as deleting, moving, copying, aligning and spacing the objects.
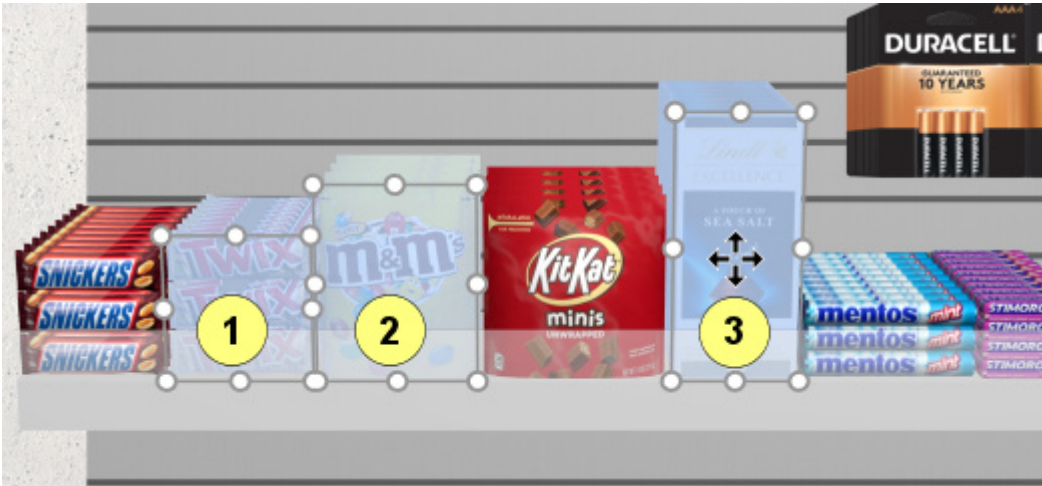
Shift + Click

1. Click on an object in the viewing area.

2. Hold the shift key and click on a second object. Both items you clicked as well as all objects placed in-between become selected and highlighted in blue.

Note: This method works similar to selecting files in Windows Explorer in list or icon view: you can select across multiple rows and bays; on each row, items are selected from left to right and then to the next row.

Tip: You can edit the current selection set by doing another **Shift+click**. This redefines the range from the outermost object already selected to the latest item you clicked.

Rectangle Selection

1. Press the mouse button somewhere in the 3D area where there is no product or accessory.

2. Keep the mouse button pressed and drag your cursor to another point in the 3D area: you will see a blue rectangle on the screen.

3. Release the mouse button and all the items that are within or cross the blue rectangle become selected.
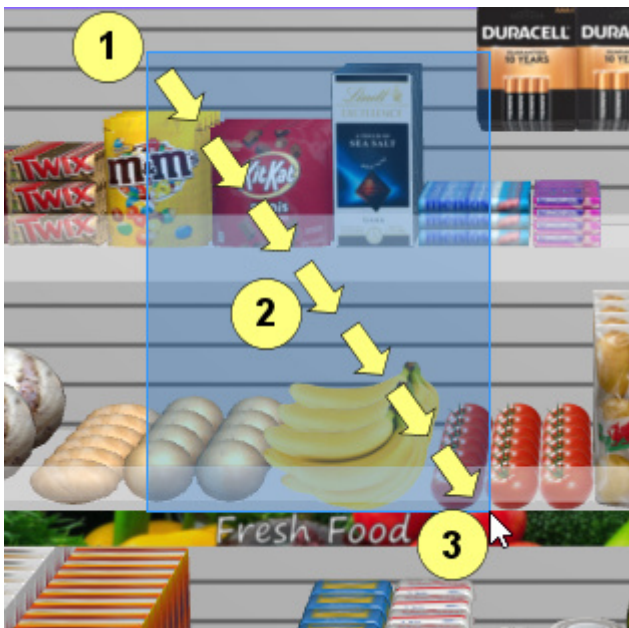
Rectangle selection   *Result*

Tip: When you want to work only with products, you can lock accessories in place to prevent accidentally selecting accessories. See Bay Locked Accessories.

Tip: If you have created a front panel covering your shelves, such as a glass door on a cooler, you may not be able to select any products behind the front panel. Please see Front Panel Visibility for help.

Tip: If you have *room elements* in your project, you may want to hide them while working with products so the walls are not blocking the view of shelving. See Room Visibility.

Select All Products

This method works only for products, not accessories:

1. Open the **Edit menu** or the **context menu > Edit**.

2. Click on the command named **Select All products.**

3. All products in your planogram are now selected.

Deselect Items
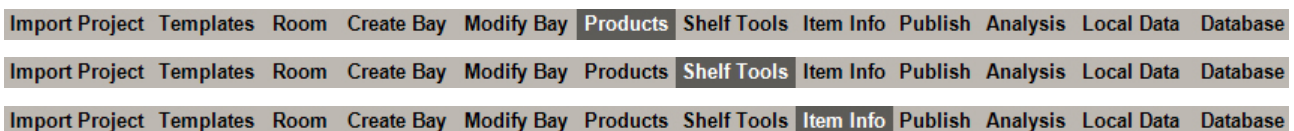
Remove Items from a Selection

1. Activate the **Edit Item** Tool by choosing the Products task (or keyboard shortcut **I**, or in **Edit menu** or in **Context menu > Edit**).

2. Click on the item to deselect or draw a rectangle while holding the **Ctrl** key pressed.

Deselect all Items

1. Activate the **Edit Item** Tool by choosing the Products task (or keyboard shortcut **I**, or in **Edit menu** or in **Context menu > Edit**).

2. Click in an empty area in the viewing area.

Change Product Facing Count

| Import Project | Templates | Room | Create Bay | Modify Bay | Products | Shelf Tools | Item Info | Publish | Analysis | Local Data | Database |

| Import Project | Templates | Room | Create Bay | Modify Bay | Products | Shelf Tools | Item Info | Publish | Analysis | Local Data | Database |
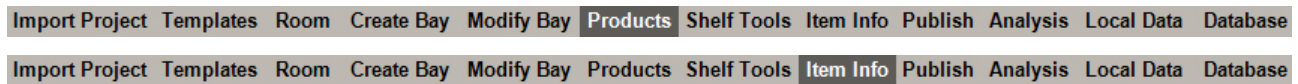
By default, PlanogramBuilder places each product on the bay with as many *facings deep* as possible, one *facing wide* and one *facing high*.

You can then change the number of facings in each direction for selected products in a planogram.

Facings deep specifies the maximum number of times products are duplicated in depth for the selected facing(s).

Example: a product with 4 facings deep

Facings Wide specifies the number of times products are duplicated horizontally for the selected facing(s).

Example: a product with 3 facings wide

Facings High specifies the number of times products are duplicated vertically for the selected facing(s).

Example: a product with 2 facings high

Tip: you can also change the facing count with the keyboard or Mouse.

Note: *Facings wide* and *facings high* count only applies and can only be changed for a facings block which forms a single selectable item. This means that products originally placed on the bay as separate items will remain so and cannot be grouped in a single item with multiple facings, even if they are adjacent. This may be the case for example if you open older projects which did not support the *facings wide* and *facings high* parameters.

Note: The number of *facings deep* placed when you drag a product from the catalog can also be pre-defined in the database for each item. This is useful if you know in advance the number of *facings deep* you want for a given product. In this case see Database Item Properties.

Change Facing Count with Mouse

Import Project Templates Room Create Bay Modify Bay **Products** Shelf Tools Item Info Publish Analysis Local Data Database

Import Project Templates Room Create Bay Modify Bay Products Shelf Tools **Item Info** Publish Analysis Local Data Database

1. **Select** the desired product(s) (see Select Items). They (It) become(s) highlighted with round handles around the surfaces most closely facing the screen.

2. If the round handles do not appear on the desired surface, use the Screen Navigation tools such as *Orbit* to make the desired surfaces face the screen.
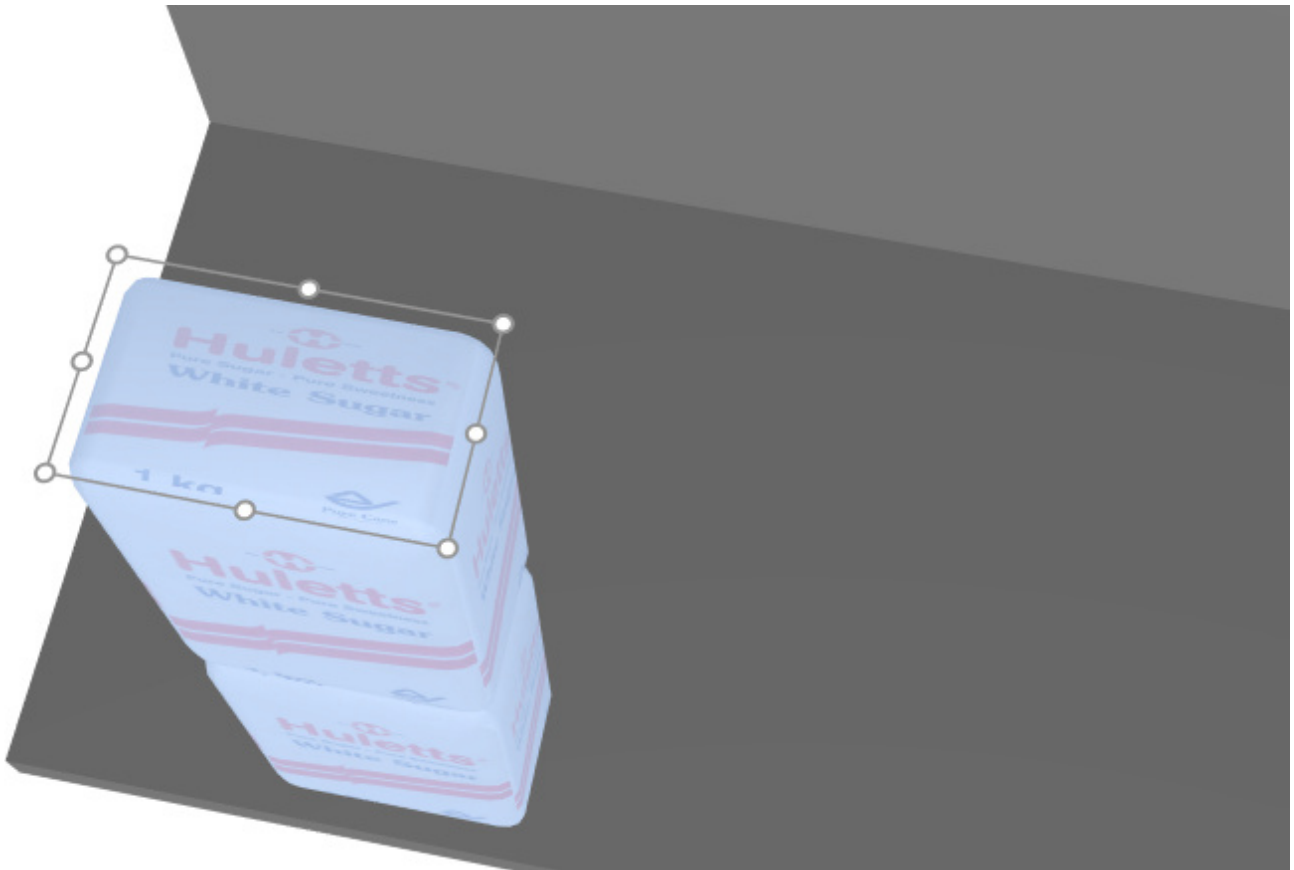
3. **Grab a handle with the mouse and drag** it in the desired direction(s) until your product(s) reach the desired facing count. The corner handles let you change facings in two directions; while the handles along edges let you constrain the change to one direction.
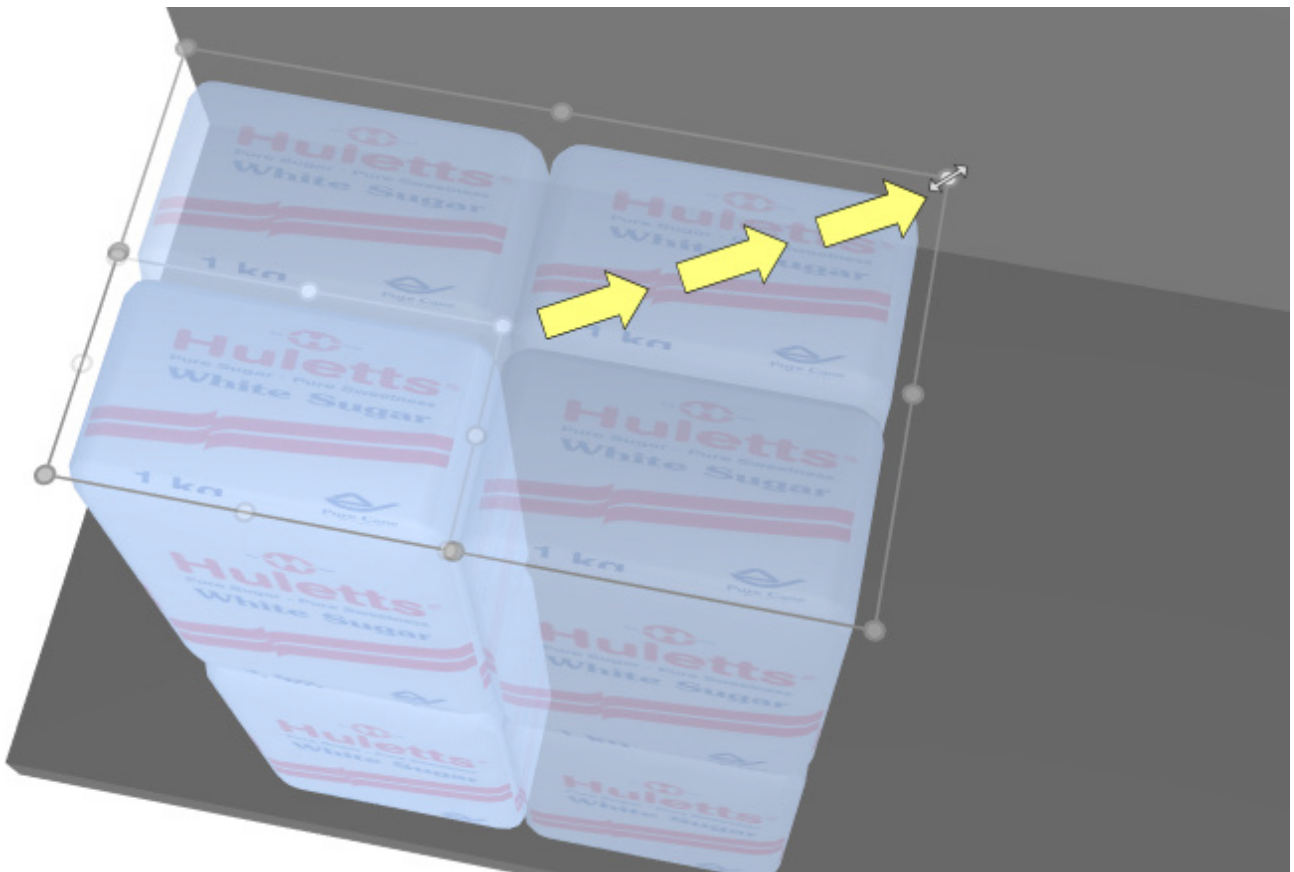
4. **Release** the mouse button when you are satisfied with the number of facings.

Tip: With Show Dimensions ON, you can display the dimensions of the resizing rectangle while resizing. This is useful if you know in advance the space to allocate to the product.
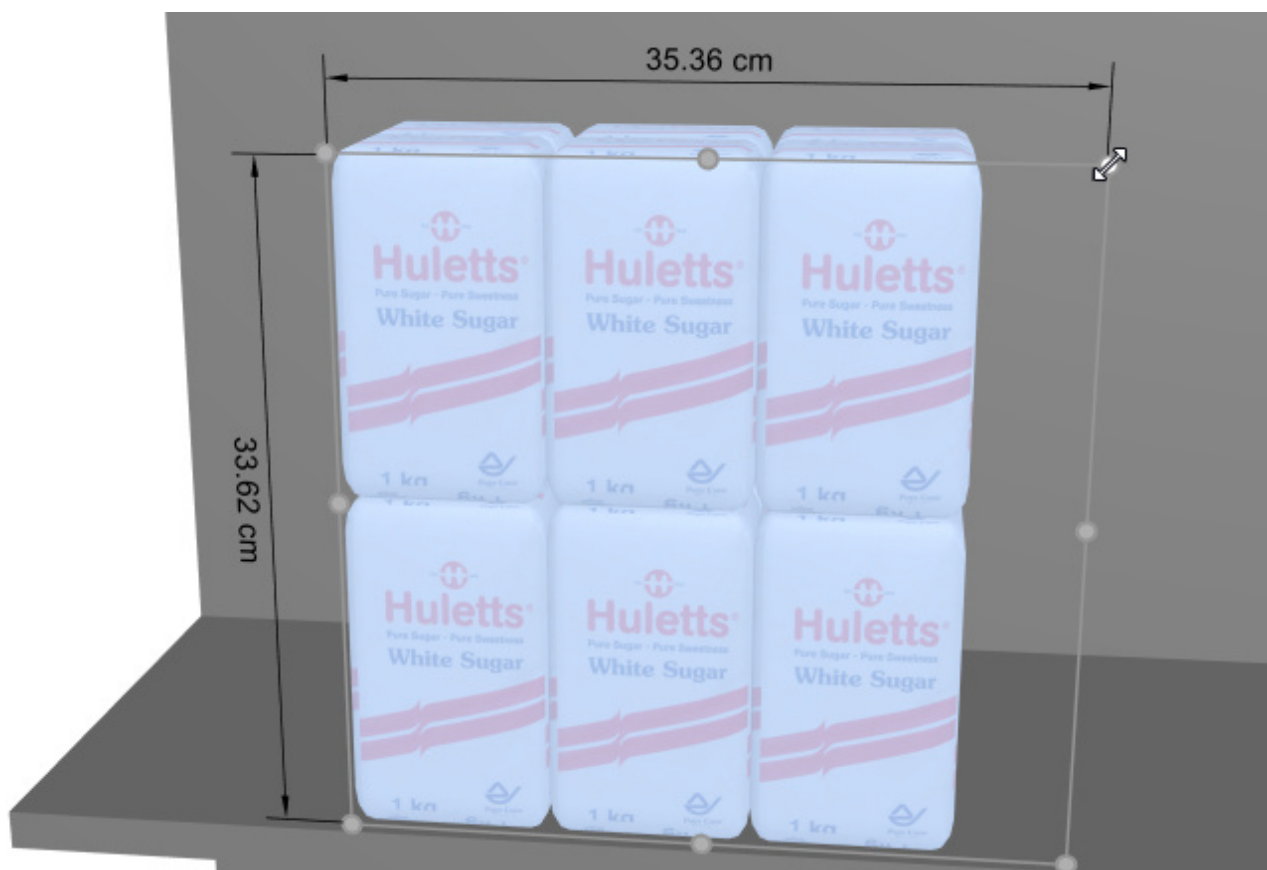
Tip: With Show Dimensions ON, you can also display the actual exact dimensions used by each facing block by pressing on a handle of the desired facing block.
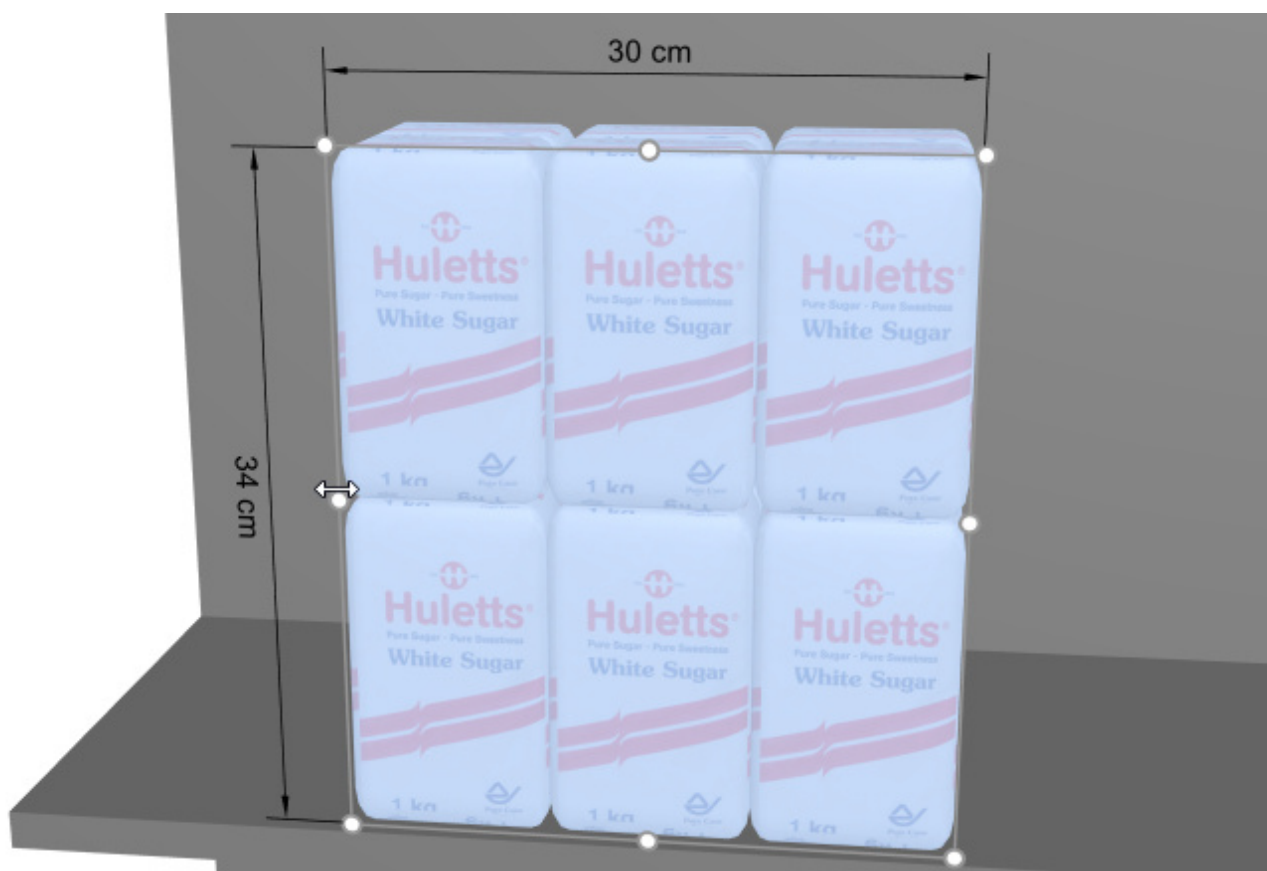
Change Facing Count with Keyboard

To change the Facing Count with the keyboard:

Facings deep: Press the **+** and **– keys** on your numeric keypad.

Facings wide: Hold the ***Shift key*** and press the **+** and **– keys** on your numeric keypad.

Facings high: Hold the ***Space key*** and press the **+** and **– keys** on your numeric keypad.

Specify Precise Facing Count

You can enter precise values to edit the Facing Count in Item Info task.

Facings deep: Enter a value or use the plus and minus buttons. If the shelf/peg is not deep enough to place the specified number of items, the number of items is automatically limited by the available space. If you type in *auto*, the number of products is automatically adjusted to fit the shelf depth or peg length.

Facings wide: Enter a value or use the plus and minus buttons.

Facings high: Enter a value or use the plus and minus buttons.

Resize Items

Resizing products and accessories is normally done in the database editor.

However there are some exceptions listed below.

Resize Generic Products

Since generic products are not defined in the database, you can resize them in Item Info.

Resize Accessories to Bay Width

This feature is useful to rescale shelf strips and bay headers so that they match the width of the bay.

1. Select the desired accessories as shown in the example below (see Select Items):

2. Open the **Edit menu**.

3. Click on the menu item labeled **Fit Bay Width**:

4. The selected accessories are now rescaled:

Move Items
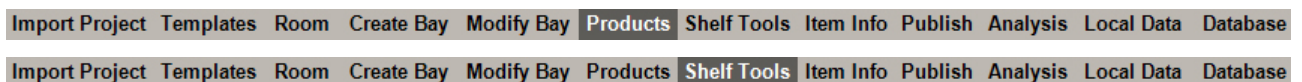
You can move products and accessories on your bays:

1. **Select** the desired item(s) (see Select Items). They (It) become(s) highlighted and a move pointer is displayed.
2. **Press and hold the mouse** button with the pointer over the selected item(s) and move the mouse to the desired new position, even to another bay.
3. **Release the mouse** button. The item is now in the new position.
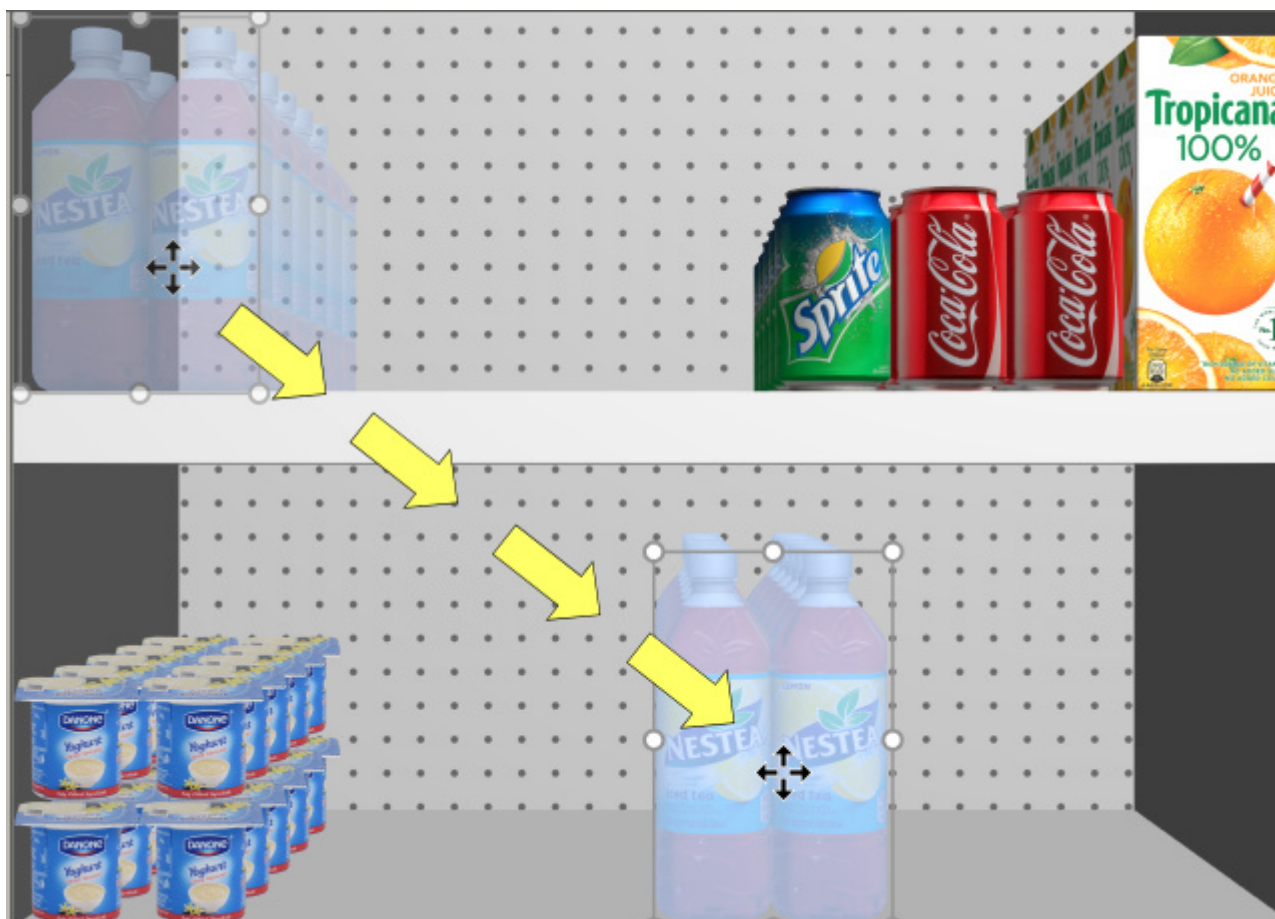
If there is some empty space between products, it is very easy to close these gaps thanks to the anti-collision feature: select the product(s), then click it and drag it/them against the other products; it will push the other products along the shelf much like in the real world:
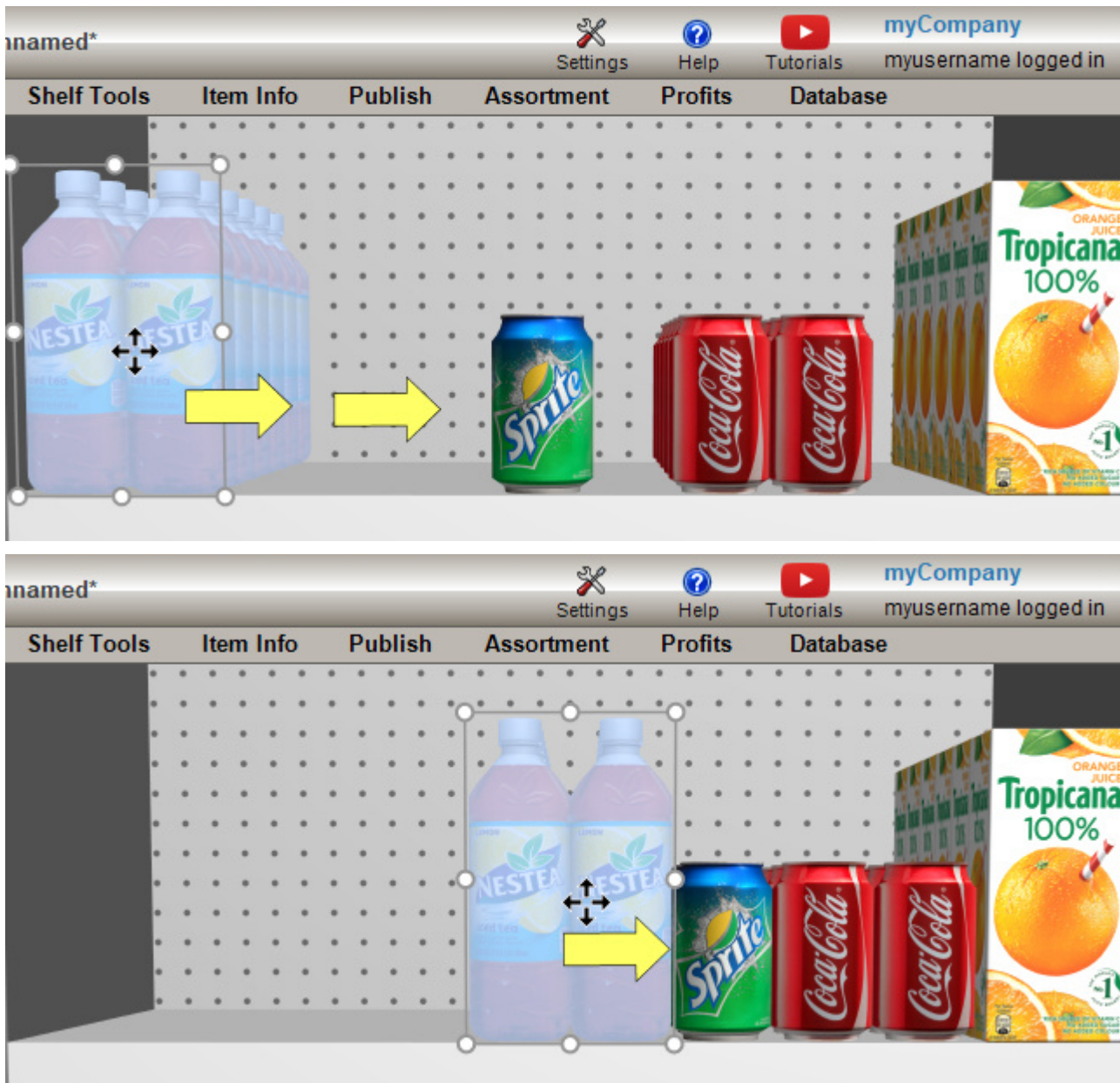
Tip: Although the automatic collision feature is convenient, there are times when you may want to disable collisions. Please see Collisions for details.

Tip: if you have selected several objects, you can move them together with a single drag and drop mouse operation. (See Select Multiple Items.)

Tip: See Auto-Snapping Items to change the way items are automatically positioned adjacent when they are close to each other.

Note: If you have created a front panel covering your shelves, such as a glass door on a cooler, you may not be able to select any products behind the front panel. Please see Front Panel Visibility for help.

Tip: When moving one or several products on a bay, you can invert their current placement mode (*pegged* or *standard*) by holding the **shift** key until you drop the products in position.

For example:

1. **Select** several products placed on a shelf

2. **Hold the left mouse button** down and start dragging the products onto the bay back wall.

3. Press and **hold the *Shift*** key

4. **Release the mouse button** when the products are in position against the back wall. The products are now pegged. If you hadn't pressed the ***Shift*** key, you could only have placed the products on a shelf.

Tip: When you want to work only with products, you can lock accessories in place to prevent accidentally moving existing accessories. See Bay Locked Accessories.

Align and Space Items

| Import Project | Templates | Room | Create Bay | Modify Bay | **Products** | Shelf Tools | Item Info | Publish | Analysis | Local Data | Database |

| Import Project | Templates | Room | Create Bay | Modify Bay | Products | **Shelf Tools** | Item Info | Publish | Analysis | Local Data | Database |

| Import Project | Templates | Room | Create Bay | Modify Bay | Products | Shelf Tools | **Item Info** | Publish | Analysis | Local Data | Database |

| Import Project | Templates | Room | Create Bay | **Modify Bay** | Products | Shelf Tools | Item Info | Publish | Analysis | Local Data | Database |

There is a series of handy commands available to distribute multiple items and bay elements on the bay. To use them:

1. Select several items (see Select Items) or bay elements (see Select Bay Elements).

2. Open the **Edit menu**.

3. In the **Align and Space** group, choose one of these menu items:

Align and Space	>	Align Left
		Align Right
		Align Top
		Align Bottom
		Space Horizontally
		Space Vertically
		Pack Left On Shelf/Row
		Center On Shelf/Row
		Pack Right On Shelf/Row
		Fill Shelf/Row Width
		Mirror Products
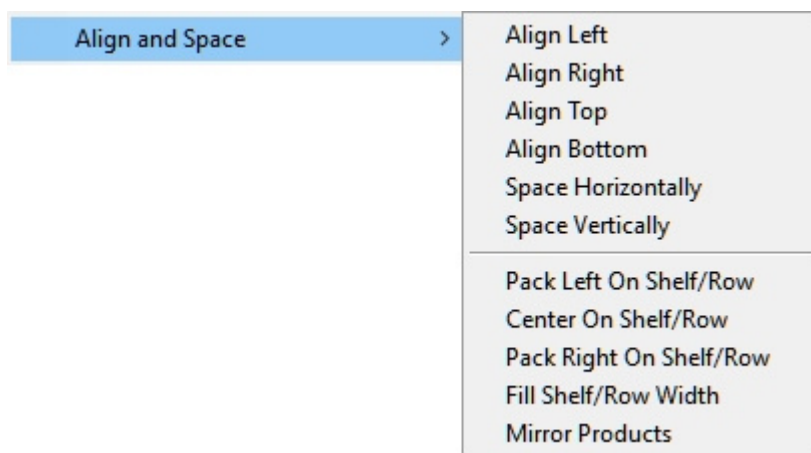
Tip: These commands are also available in the **Context menu > Edit > Align and Space**.

Note: Collisions are disabled when aligning or spacing items.

Note: If you have created a front panel covering your shelves, such as a glass door on a cooler, you will have to hide front panels before selecting products. Please see Front Panel Visibility for help.

Align and Space settings

Settings > Viewing & Editing

The following setting affect the way align and space commands are applied.

Spacing applies within multi-facings

(Spacing applies to each facing)

This setting determines how products are spaced. It applies to the following commands:

- Space Horizontally
- Space Vertically
- Pack Left On Shelf/Row
- Center On Shelf/Row
- Pack Right On Shelf/Row
- Fill Shelf/Row Width

Checked: Each facing is redistributed in space no matter if it is part of a multi-facing block. All gaps between facings within product blocks are also adjusted to match the desired distribution. Use this setting if you want to obtain an even spacing between each facing, no matter if they are part of a same product block.

Unchecked: The entire facing blocks are redistributed in space to match the desired distribution. The gaps between individual facings within blocks are however maintained as in the original. Choose this settings if you want to obtain an even spacing between product blocks, while being able to adjust separately the spacing between facings within blocks.

Examples of both settings are shown in the next sections.

Align and Space per Selection

Import Project	Templates	Room	Create Bay	Modify Bay	Products	Shelf Tools	Item Info	Publish	Analysis	Local Data	Database
Import Project	Templates	Room	Create Bay	Modify Bay	Products	Shelf Tools	Item Info	Publish	Analysis	Local Data	Database
Import Project	Templates	Room	Create Bay	Modify Bay	Products	Shelf Tools	Item Info	Publish	Analysis	Local Data	Database
Import Project	Templates	Room	Create Bay	Modify Bay	Products	Shelf Tools	Item Info	Publish	Analysis	Local Data	Database

The following commands distribute *products*, *accessories* and *bay elements* within the physical limits of the selected objects. See Align and Space Items for usage.

Note: you can also apply these commands to items placed across several bays if the bays are placed side by side, parallel and not too distant from each others.

Align Left / Right / Top / Bottom
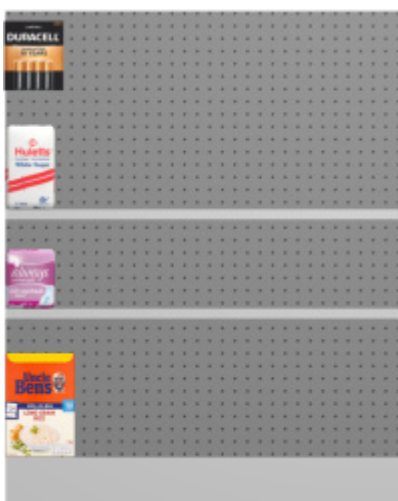
| *Original placement* | *Align Left* | *Align Right* |

| Original placement | Align Top | Align Bottom |
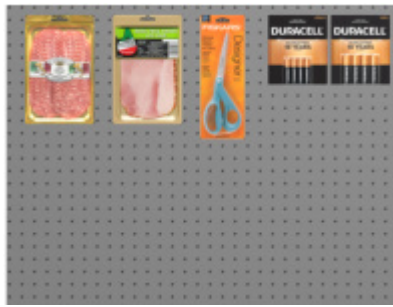
Space Horizontally / Vertically

Examples with Spacing applies to each facing checked:
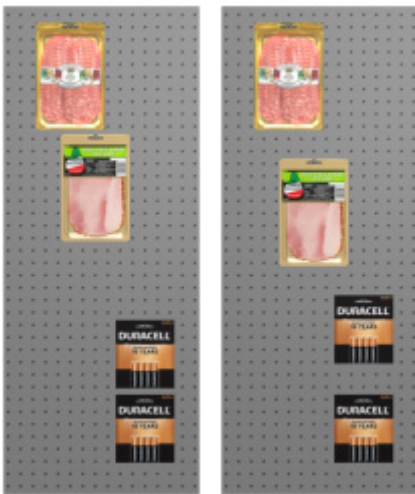
| Original place | Space Vertically | Original placement | Space Horizontally |

Examples with Spacing applies to each facing unchecked:
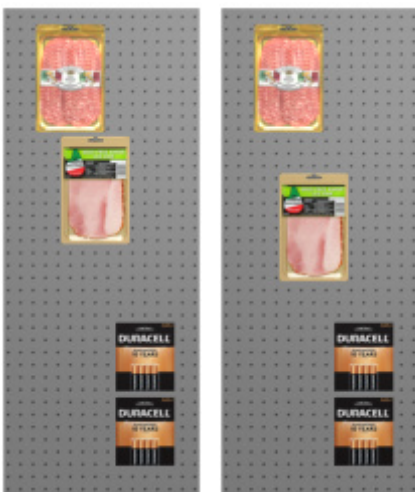
| Original place | Space Vertically | Original placement | Space Horizontally |

Align and Space per Shelf / Row

The following commands distribute *products* and *accessories* within the physical width of the corresponding shelf (shelves) or row(s).

See Align and Space Items for usage.

Note: you can also apply these commands to items placed across several shelves, rows and bays. The command is applied to all selected items but independently per shelf / row.

Note: if you have allowed Shelf Lateral Overhang / Back Panel Lateral Overhang where the selected items are placed, PlanogramBuilder still tries to fit the items within the physical bounds of the shelves / rows. But if the selected items only fit on the shelf / row with an overhang, the minimal possible overhang is applied.

Center on Shelf / Row

Examples with Spacing applies to each facing checked:

Original placement

Center on Shelf / Row

Examples with Spacing applies to each facing unchecked:

Original placement

Center on Shelf / Row

Pack Left / right on Shelf / Row

Examples with Spacing applies to each facing checked:

Pack Left on Shelf / Row

Pack Right on Shelf / Row

Examples with Spacing applies to each facing unchecked:

Pack Left on Shelf / Row

Pack Right on Shelf / Row

Fill Shelf / Row Width

Examples with Spacing applies to each facing checked:

Original placement

Fill Shelf / Row Width

Examples with Spacing applies to each facing unchecked:

Original placement   *Fill Shelf / Row Width*

Mirror Products

This command lets you invert the left-right order of selected products on each row or shelf. It is convenient for example when you change the flow direction.

To perform this task:

1. **Select** the products to mirror (see Select Items).

2. Open the **Edit menu**.

3. In the **Align & Space** group, click on the command labeled **Mirror Products**.

4. Now the left-right order of all selected products is inverted on each shelf and row.

Tip: This command is also available in the **Context menu > Edit > Align and Space**.

Note: This command only works on products, not on accessories.

Rotate Products

| Import Project | Templates | Room | Create Bay | Modify Bay | **Products** | Shelf Tools | Item Info | Publish | Analysis | Local Data | Database |

| Import Project | Templates | Room | Create Bay | Modify Bay | Products | Shelf Tools | **Item Info** | Publish | Analysis | Local Data | Database |

These commands let you rotate selected products by increments around the selected axis X, Y or Z.

1. Select one or more product(s) (see Select Items).

2. Open the **Edit menu**.

3. In the **Rotate** group, select one of these commands.

Rotate	>	Rotate X Counterclockwise 90°	<-
		Rotate X Clockwise 90°	->
		Rotate Y Counterclockwise 90°	v
		Rotate Y Clockwise 90°	^
		Rotate Z Counterclockwise 90°	
		Rotate Z Clockwise 90°	
		Product Upside Down	U
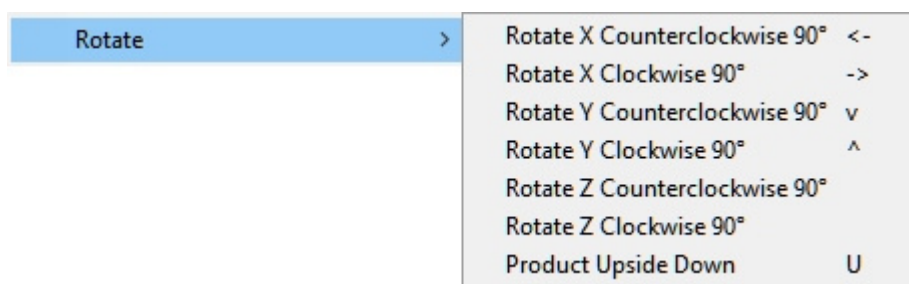
4. The selected products have now been rotated.

While in **Products task** or **Item Info task**, the **Rotate clockwise**… commands are also available as buttons in the **Edit toolbar**.

The **Rotate…** commands rotate products in 90 degree increments.

Note: Use **Shift+click** on the rotate icons to invert the rotation direction.

Keyboard shortcuts: **up**, **down**, **left** and **right Arrows**

The **Product Upside Down** command let you to rotate selected products by 180 degrees: The front face still faces you, but the product(s) is (are) then upside down.

Keyboard shortcut: **U**

Example of a rotated product:

---

initial orientation   270 degree Y rotation

Tip: These commands are also available in the **Context menu > Edit > Rotate**.

Note: If you have created a front panel covering your shelves, such as a glass door on a cooler, you may not be able to select any product behind the front panel. Please see Front Panel Visibility for help.

Copy Items

| Import Project | Templates | Room | Create Bay | Modify Bay | **Products** | Shelf Tools | Item Info | Publish | Analysis | Local Data | Database |

| Import Project | Templates | Room | Create Bay | Modify Bay | Products | **Shelf Tools** | Item Info | Publish | Analysis | Local Data | Database |

| Import Project | Templates | Room | Create Bay | Modify Bay | Products | Shelf Tools | **Item Info** | Publish | Analysis | Local Data | Database |
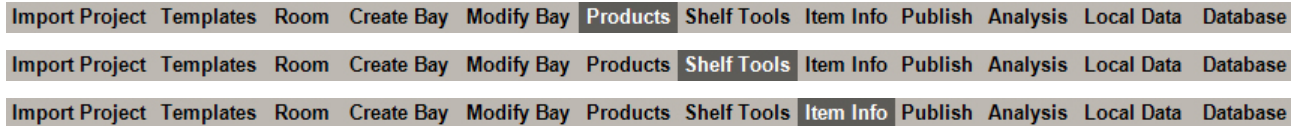
In **Products**, **Accessories** or **Item Info** task, select the **Edit** tool to copy products and props.

Copying is almost the same process as Move Items:

1. **Select** the desired item(s) (see Select Items).
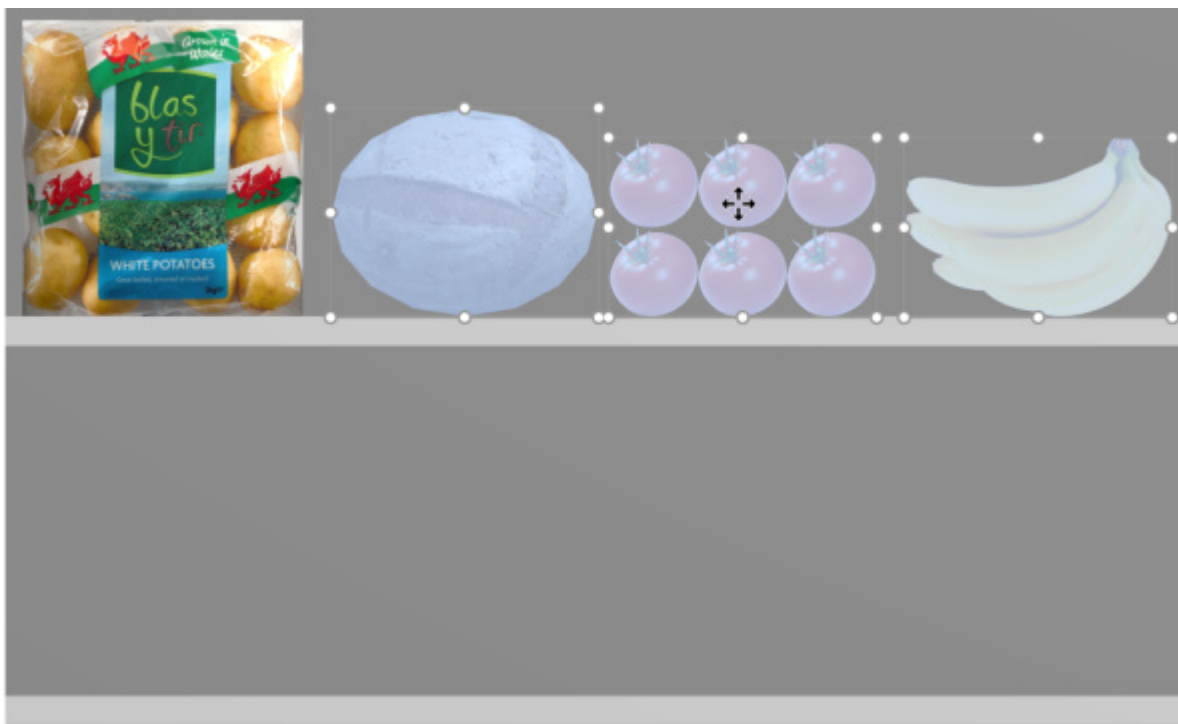
2. Hold the **Ctrl** keyboard key and **press the mouse** button over the selected items.

3. **Drag** the item to the area where you want to place the copied item(s).

4. Release the mouse button.
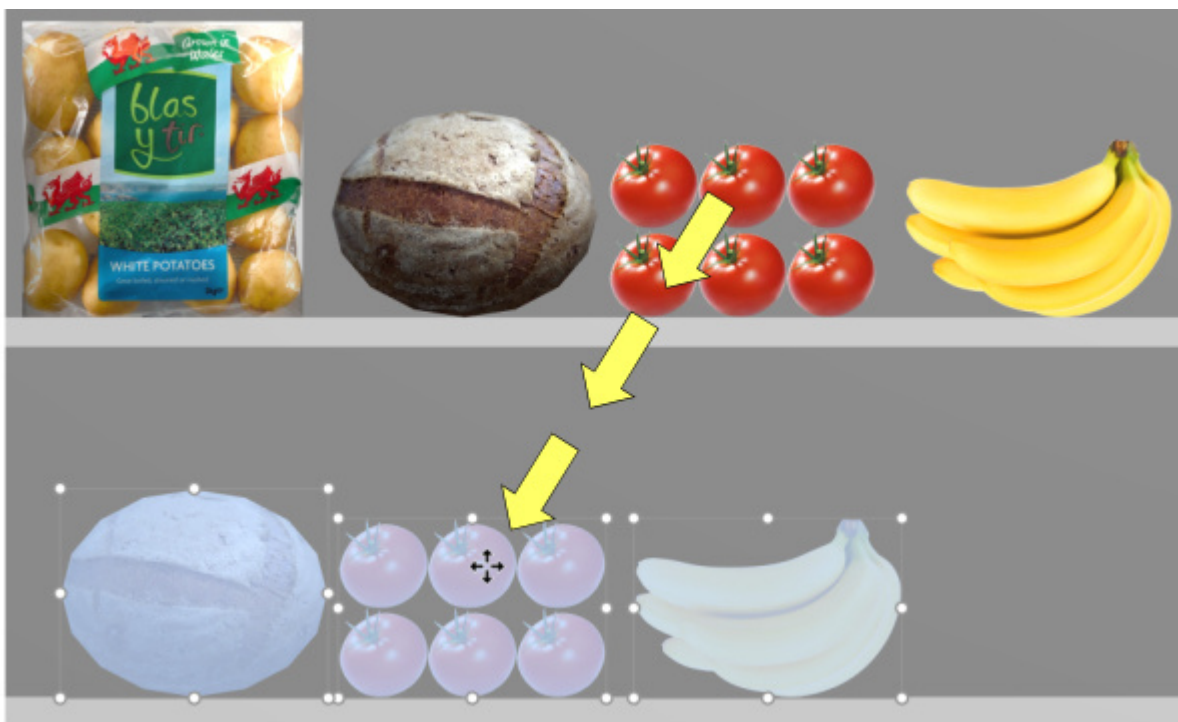
Important note: Do not use the copy function to create a block of multiple adjacent facings of the same product. See instead Change Product Facing Count.

Note: Anti-collision is automatically disabled when Copying Items.

Tip: If you copy a generic product, it creates a new independent generic product which can then be edited to have different characteristics such as dimensions, name, etc. (see Add Generic Product)

Tip: If you have created a front panel covering your shelves, such as a glass door on a cooler, you may not be able to select any products behind the front panel. Please see Front Panel Visibility for help.

Tip: If you have *room elements* in your project, you may want to hide them while working with products so the walls are not blocking the view of shelving. See Room Visibility.

Replace Products

Import Project Templates Room Create Bay Modify Bay **Products** Shelf Tools Item Info Publish Analysis Local Data Database

You can replace a product already in your planogram by a product from the catalog. This lets you exchange products in a slot quickly without having to delete the replaced product first.

To replace a product:

1. Select the **Products** task and make sure the **Edit Item** Tool is active.

2. **Click and hold your mouse** button on an object in the catalog.

3. Maintain your **mouse button down + hold the *Alt* keyboard key while dragging** the item over the product to replace in your planogram.

4. **Release the mouse button** and the product will replace the old product facings.
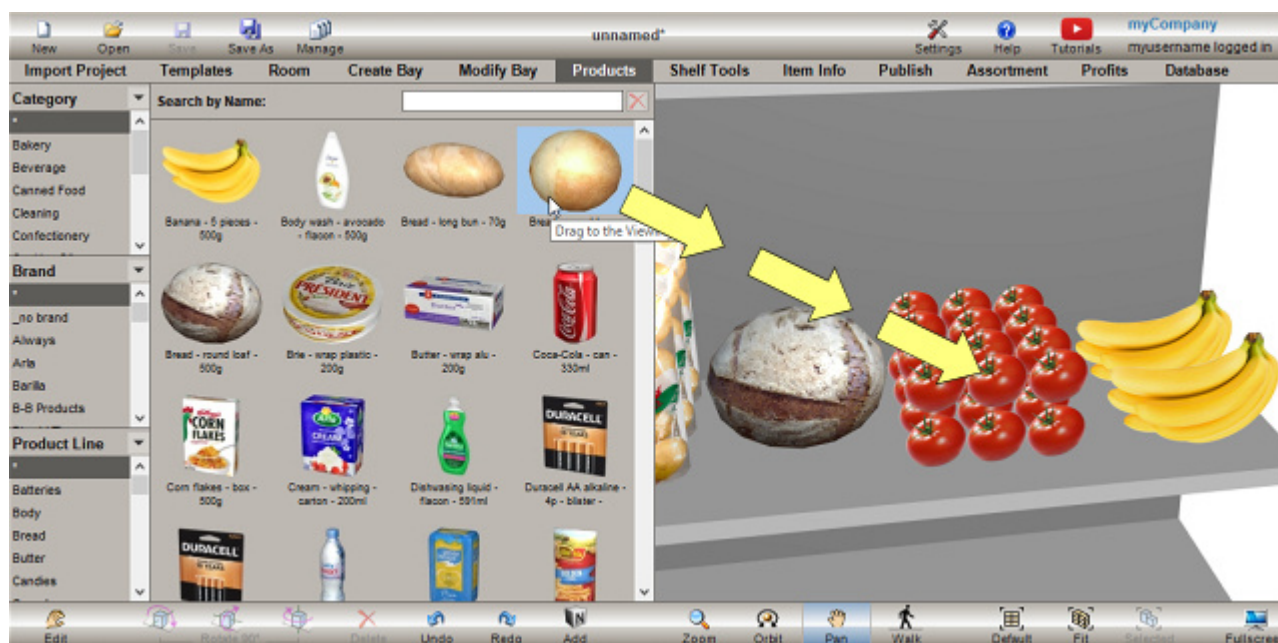
Drag the new product over the product to replace.
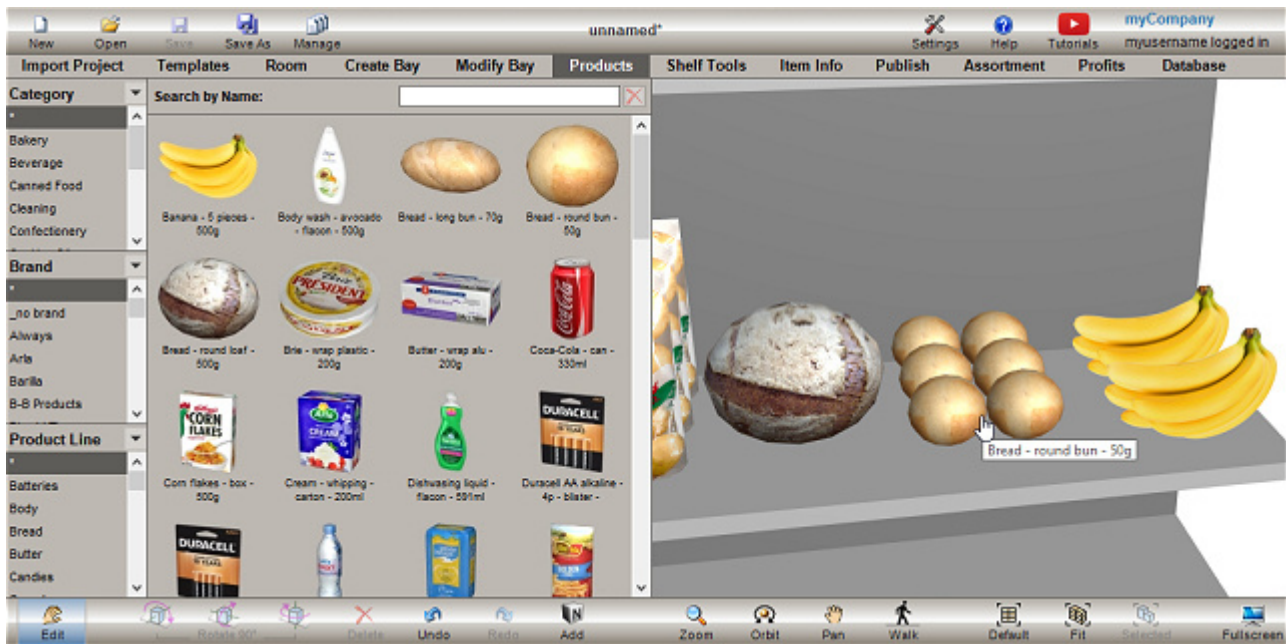
The old product is replaced by the new product with fitting facings.

Notes:

When you replace a product, all parameters of the replaced facing(s) are transferred to the new facings (product behavior, facings gaps, …), except the number of facings which is automatically computed as follows:

- The new product will have as many facings deep, wide and high as can fit in the space used by the old product facings.

- If the new product is larger than the old facings block, it will still be placed if there is enough space between the neighboring items.

- If there is not enough space between the neighboring items to place at least one new facing, the replacement isn't performed.

Ex: if you replace a product by one that has exact same dimensions, the same number of facings is placed in the space.

Delete Items
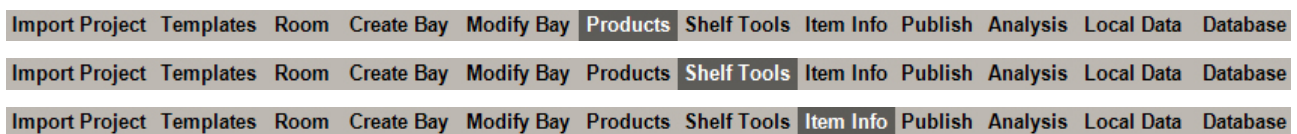
In **Products**, **Accessories** or **Item Info** task:

1. Select the products and accessories to delete (see Select Items).

2. Press the **Delete** button, or the **Delete key** on your keyboard, or the **Delete** command in the **Edit menu** or in the **Context menu > Edit**).

View and Edit Item Info

The **Item Info** task lets you view the selected product or accessory properties and also override per facing some of the item properties that were pre-defined in the database.

Selected Product

Name:	Wall charger
Width:	10.00 cm
Height:	17.50 cm
Depth:	1.75 cm
Color:	
Reference:	z.02.13.01

☑ Collisions

Behavior:	pegged ⌄
Depth alignment:	○ front ◉ back
Facings Wide:	— 4 +
Facings High:	— 3 +
Facings Deep:	— auto +
Width gap:	1.00 cm
Height gap:	2.00 cm
Depth gap:	0.00 cm
Lateral offset:	0.00 cm
Vertical offset:	1.00 cm

Caption:	[rp] $

Tip: If multiple items are selected, the values you enter are applied to all selected items in a single operation. See Select Multiple Items for details.

Tip: If you have created a front panel covering your shelves, such as a glass door on a cooler, you may not be able to select any products behind the front panel. Please see Front Panel Visibility for help.

Tip: If you have *room elements* in your project, you may want to hide them while working with products so the walls are not blocking the view of shelving. See Room Visibility.

Item Properties

Name, **Width**, **Height**, **Depth, Color** and **Reference** (see descriptions in Database Item Properties.)

For products and accessories available in the *database* / *catalogue*, these properties are read-only and shown for information only. You can still copy the values to the clipboard with ***Ctrl+C***.

For *Generic products*, the above properties are editable in Item Info because *these items* are not defined nor saved in the database.

Behavior, **Collisions, Facings Deep, Width Gap, Height gap, Depth gap, Vertical offset, Lateral offset** and **Caption**

Although these parameters can be set in the database, you can also set or override the database values per facing in the current planogram project. This is convenient if you need to apply a non standard value for a special use case, for example to put a product on a shelf although it was defined as pegged in the database. Here are their descriptions:

Behavior

Lets you change the way you want to place the selected product(s) on your fixture. See Product Behaviors for details on this property. *Note*: *accessories behavior* cannot be changed here, but only in the database.

Collisions

Can be enabled or disabled per item in your project for the selected products and accessories. See *Collisions* in the Database Item Properties for details on this property. Also see Collisions for various collision options.

Facings Deep

Specifies the maximum number of times products are duplicated in depth for the selected facing(s). See Specify Precise Facing Count.

Width Gap

Sets the horizontal gap between products with multiple width facings. This setting applies to the selected facing(s).

Note: For products pegged on pegboard type panels, the value entered corresponds to the minimal gap: the product will be placed on the nearest hook guaranteeing this minimal gap.

Height Gap

Sets the vertical gap between products with multiple height facings. This setting applies to the selected facing(s).

Note: For products pegged on pegboard or slatwall type panels, the value entered corresponds to the minimal gap: the product is placed on the nearest hook guaranteeing this minimal gap.

Tip: You can enter a negative value to represent nested products, such as bowls. The value corresponds to the distance the product should "enter" into the one below.
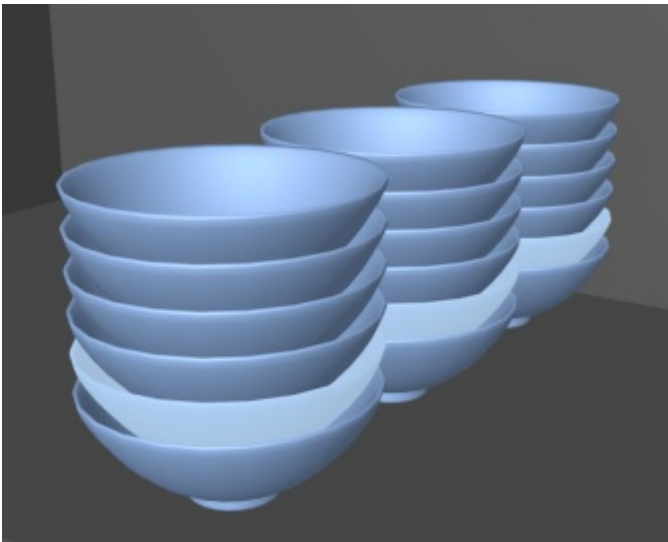
Example of bowls nested using a negative Height gap value

Depth gap

Sets the depth gap between products with multiple depth facings. This setting applies to the selected facing(s).

Tip: You can enter a negative value to represent products nested along the depth axis, such as plate. For negative values, the value corresponds to the distance the product should "enter" into the one behind itself.

Example of products spaced using a 3cm depth gap value

Vertical offset

Lets you shift products higher or lower by a specified distance (pegged products only). This is convenient to define the position of the hanging hole on a product. (Default: *1cm* or *0.39"*)

- value of *0* = the product top edge is aligned to the peg hole on the back panel
- positive values = moves the product up
- negative values = moves the product down

Lateral offset

Lets you shift products to the left or to the right (pegged products only). This is convenient when the product hanging tab is not centered on the product. (Default: 0cm or 0")

- value of *0* = the product is centered on the peg hole
- positive values = moves the product right
- negative values = moves the product left

Caption

Lets you specify a new text caption value for the special ***tag*** accessory. This value is normally defined by default in the database as described in Database Item Properties.

The **Depth alignment, Facings wide** and **Facings High** parameters apply to products only. Their values can only be set per facing since they cannot be defined per item in the database. Here are their descriptions:

Depth alignment

Determines whether products are aligned to the back or to the front of the shelf or peg onto which they are placed.

- **front** aligns the selected products to the front of the shelf (minus the front margin) or to the fore tip of the peg (= the hook length from the back panel). This is the default value for non-pegged products. Example below:

- **back** aligns the selected products to the back of the shelf or peg, typically against the back panel. This is the default value for pegged products. Example below:
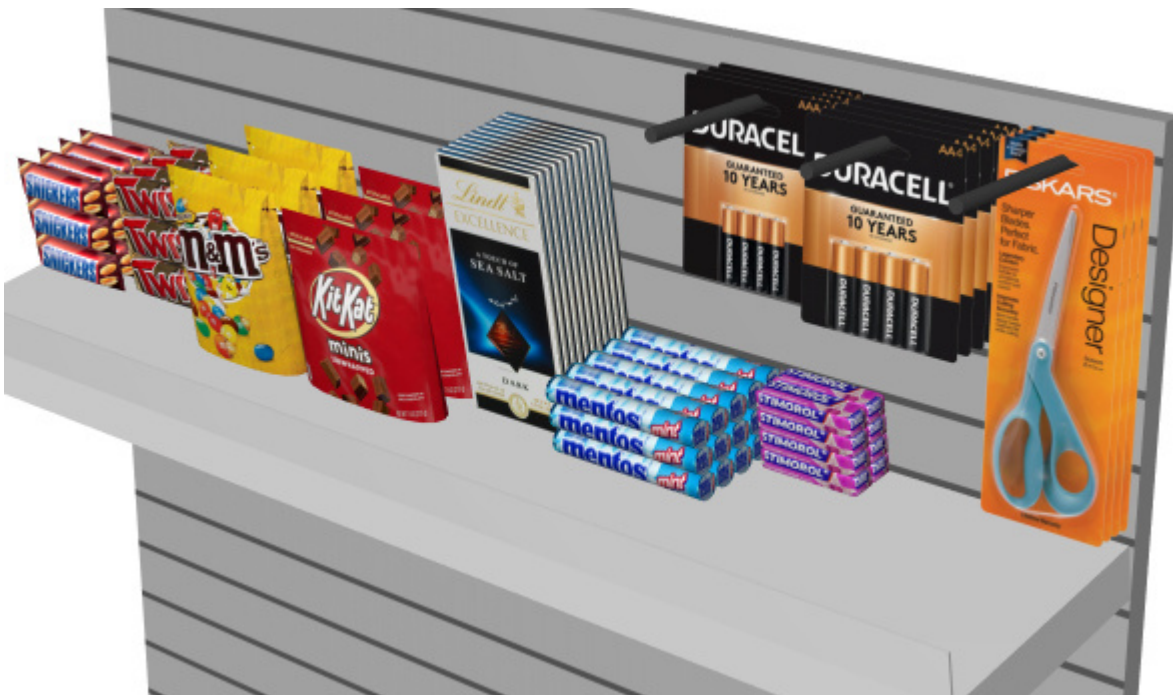
Facings Wide

Specifies the number of times products are duplicated horizontally for the selected facing(s). Enter a value or use the plus and minus buttons.

Example: a product with 3 facings wide

Tip: you can also change the facing count with the keyboard or Mouse.

Facings High

Specifies the number of times products are duplicated vertically for the selected facing(s). Enter a value or use the plus and minus buttons.

Example: a product with 2 facings high

Tip: you can also change the facing count with the keyboard or Mouse.

Project Item List

The Project Item List displays a list of all the items (products and accessories) in your project. It can be configured to display any available item property and several computed values.

It also lets you select products and accessories in your project (one at a time).

To display / hide the Project Item List:

1. Open the **Display menu** or the **Context menu > Display**.
2. Click on **Project Item List**.

This list is also always opened in the Publish task because it is used to configure the Reports list content.

The list panel can also be closed with the cross icon in its upper right corner.

List Content Choice

The Content Choice menu on the left of the list header bar lets you configure what is displayed in the list, as well as the grouping and highlighting of items.

To display the Content choice panel:

1. Click on the **right-pointing arrow** next to **Content choice**.

2. The panel is now displayed.

To hide the Content choice panel:

1. Click on the **down-pointing arrow** next to **Content choice**.

2. The panel is now hidden.

Type of Items

Check the type of items you want displayed in the list:

- Products

- Accessories

Columns

Check the items properties you want to see listed as columns in the list.

For each property displayed in the list, the value is shown for each item. Totals or average values per group and per project are also shown when possible for numeric and percentage values.

Notes:

Undefined metrics are displayed with the *N/A* value.

Metrics based on incomplete data have the *(MD)* (missing data) value appended to the calculated value.

The following properties are available:

Picture

Thumbnail: enable this column to display thumbnail images of each item in the list. Thumbnails can help identify each product visually in the listing.

The thumbnail size is adjusted based on the selected font size, and it uses the same viewpoint as in the catalog thumbnails.

Position

Position: this assigns numbers from 1 to n to each product listed. Numbering is assigned based on each item physical location with the following rules:

- On each bay, numbering is ordered from the left-most product on the highest shelf/row to the left-most product on the lowest shelf/row.

- If items are grouped in the list by Bay number or by Bay name, item numbering restarts from 1 at each bay.

- If items are **not** grouped in the list by Bay number or by Bay name, a unique number is assigned to each item in the project. In this case numbering starts from items on the 1st Bay number and ends with those on the last Bay number in the planogram.

Tip: To quickly find the position of each product, the *Position* column can be combined with matching number labels on the products in schematic view.

Bay number: a unique number assigned to each bay. Numbering starts from the left-most bay and ends with the right-most bay in the planogram as seen from the front.

Bay name: the name of each bay as defined in Bay Name. If no name is defined for a given bay, its Bay name is displayed as *Bay [Bay number]*, for example *Bay 7* in the item list.

Shelf/Row: when checked, a column shows on which shelf or row of the bay each product is. *Note*: Even empty shelves are numbered.

Bay – Shelf: this provides a more compact version of item position, combining *Bay number + Shelf / Row*. Foer example 2-5 means the item is on bay 1, shelf 5.

Horizontal ID: a column numbering items from 1 to n from left to right on each shelf / row. All items stacked vertically in a same stack have the same horizontal ID value.

Note: any item of same *reference* placed several times side by side and with the same values for *Facings Deep* and *Facings High* will account for a single horizontal ID. In this case the *Facings Wide* value is set to the number of adjacent piles of the item. See the corresponding *Facing Wide/High/Deep* definitions below.

Description

Enabled, **Reference**, classification (ex: **Category**, **Brand**, **Product Line**), Name, custom properties (ex: **weight**, **country**, etc), **Color**.

See Database Item Properties for details on each of the above item properties.

Dimensions

Width, **Height**, **Depth**.

See Database Item Properties for details on each of the above item properties.

Type

Type: the type of item, either *Product* or *Accessory* based on the type defined in the database for each item.

Behavior: outputs each item behavior. For *accessories*, this is the item behavior as defined in the database (see Accessory Behaviors). For *products*, this is the item behavior as defined in the database, or the item behavior set per facing in the current project if different (see Product Behaviors).

Arrangement

Depth alignment, **Width gap**, **Height gap**, **Depth gap**, **Lateral offset**, **Vertical offset**, **Collisions**:

See Item Properties for details on each of the above item properties.

Facings

Facings Wide, Facings High, Facings Deep:

The number of facings based on what is defined in Item Properties.

The total facings are computed per block of same products, according to the following rules:

- Adjacent Facings part of a facings block (single selectable entity) are grouped on 1 line with their total number of facings.
- Adjacent facings part of separate facings blocks (multiple entities) are treated as separate facings (separate lines in the list) and listed on disctinct lines.
- Different products stacked vertically are listed on disctinct lines.

Capacity: if checked, a column is created showing the total quantity of each product on one line in the list (= Facings Wide × Facings High × Facings Deep).

Space Used

Linear space [cm] / [in]: the width used by each facings block on the fixture.

For on shelf products (standard): linear space = facings block width. (in the case of shelved products with multiple facings high, each row uses the same shelf and backpanel slot, so we count only the base row of the stack as using linear space)

For pegged products: linear space = facings block width × facings high. (in the case of pegged products with multiple facings high, each row uses a separate backpanel slot, so we count each row as using linear space)

Totals are expressed in the measurement unit selected in Measurement unit.

Linear space [%]: the width used by each facings block expressed in percentage of the total space used by products on a given bay.

for on shelf products (standard): linear space = facings block width.

for pegged products: linear space = facings block width × facings high.

Front surface [cm^2] / [in^2]: the front area (width × height) used by each facings block. This column also gives the total facing area used by all products on a bay. The values are expressed in the measurement unit selected in Measurement unit.

Front surface [%]: the front area (width × height) used by each product expressed in percentage of the total area used by all products on a given bay. This column always gives a total area of 100%, corresponding to the area used by all products on the bay.

Volume used [cm^3] / [in^3]: the volume (width × height × depth) used by each product. Totals are expressed in the measurement unit selected in Measurement unit.

Volume used [%]: the volume (width × height × depth) used by each facings block expressed in percentage of the total volume used by all products on a given bay.

Note: **Linear space**, **Front surface** and **Volume used** are computed based on the space taken by each product block including the gaps between facings if any. For example, a product measuring 10cm wide × 8cm high placed as 2 facings wide × 2 facings high, with a width gap of 1cm results in this front surface:

((10cm × 2 + 1cm) × (8cm × 2)) = 336cm^2

Price

The columns described below let you to display pricing information in your list:

Wholesale price: the buying price of each product in your planogram.

Retail price (tax excl.): the retail price before tax of each product in your planogram.

Retail price (tax incl.): the retail price including tax of each product in your planogram.

Single item markup: the difference between *Wholesale price* and *Retail price (tax excl.)*.

Sales tax rate: the sales tax rate in percentage of the *retail price (tax. Excl.)* for each product.

Note: these columns require a Price List.

Note: products with missing values display an *N/A* value.

Sales

Quantity sold: This column lets you to display sales information in your list.

For each product in your planogram, this column shows the number of items sold based on the currently loaded sales figures (ex: the number of items sold last month in New York stores).

Note: this column requires sales figures.

Note: products with missing values for quantity sold display an *N/A* value.

Analysis

Project analysis value: the current Project Analysis result for each product

The information in this column can vary; see Project Analysis to configure the data to display.

Note: products with missing value display an *N/A* value.

On shelf value

Wholesale value

Retail value

Markup

Markup percent

Profit margin

Please see On shelf value in the *Project Analysis* section for an explanation of the above values.

Note: Columns with the above values also display the super header "On shelf value" above the column header(s).

Note: products with missing values display an *N/A* value.

Sales forecast

Wholesale value

Retail value

Markup

Markup percent

Profit margin

Please see Sales forecast in the *Project Analysis* section for an explanation of the above values.

Note: Columns with the above values also display the super header "Sales forecast" above the column header(s).

Note: products with missing values display an *N/A* value.

Grouping

You can group items in the Project Item List by any available property.

When using groups, sub-totals per group are also displayed for applicable columns (percentages and numeric values).

To group items in the list:

1. In the **List content**, under **Columns**, right-click on the property name by which you want to group items. For example, right-click on *Bay number*.

2. A context menu is displayed.

3. Select **Group by *Bay Number***.

4. The list of items is now grouped by Bay number. A group icon is also displayed in the Project Item List header bar showing the curent grouping property.

To ungroup items in the list:

1. Right-click anywhere within the Project Item List panel to show its context menu.

2. Select **Group by (None)**.

To expand / collapse a group in the list:

1. Click on the right-pinting / down-pointing arrow next to the group name in the list.

To expand / collapse all groups in the list:

1. Right-click anywhere within the Project Item List panel to show its context menu.

2. Click on respectively **Expand all groups** / **Collapse all groups**.

Example of grouped items: the screenshot in Project Item List shows an example of the list grouped by Bay name.

Highlighting

You can highlight items in the Project Item List by any available property.

1. In the **List content**, under **Columns**, right-click on the property name by which you want to highlight items. For example, right-click on *Category (*or *Project analysis value)*.

2. A context menu is displayed.

3. Select **Highlight by *Category*** (or *Project analysis value)*.

4. The list of items is now highlighted by Category (or *Project analysis value)*. A group icon is also displayed in the Project Item List header bar showing the curent grouping property.

5. The products in the visual area are also highlighted by Category (or *Project analysis value)*, and a color range bar is displayed above the visual area as a legend if applicable (for numeric and percentage values).

To un-highlight items in the list:

1. Right-click anywhere within the Project Item List panel to show its context menu.

2. Select **Highlight by (None)**.

Thumbnail	Position	Bay - Shelf	Reference	Name	Category	Facings Wide	Facings High
Content choice		⊟ Bay name	🌈 Category		Preset:	⌄	✕

Thumbnail	Position	Bay - Shelf	Reference	Name	Category	Facings Wide	Facings High
⌄ Bay 1							
	1	1-1	zv-0000000063	Duracell AAA alkaline - 4p - blister	Electronics	1	1
	2	1-1	zv-0000000061	Duracell AA alkaline - 4p - blister	Electronics	1	1
	3	1-1	zv-0000000062	Scissors - Designer 20cm - blister	Household	1	1
	4	1-2	zv-0000000052	Snickers - wrap plastic - 50g	Confectionery	1	3
	5	1-2	zv-0000000055	Twix - wrap plastic - 50g	Confectionery	1	3
	6	1-2	zv-0000000053	M&M's - pouch - 185g	Confectionery	1	1
	7	1-2	zv-0000000064	Kit Kat Minis unwrapped - pouch - 215g	Confectionery	1	1
	8	1-2	zv-0000000056	Lindt Excellence - Dark Sea salt - box - 100g	Confectionery	1	1
	9	1-2	zv-0000000057	Mentos Mint - wrap alu - 37.5g	Confectionery	1	3
	10	1-2	zv-0000000060	Stimorol Wild Cherry - wrap alu - 14g	Confectionery	1	4
	11	1-3	zv-0000000005	Bread - round loaf - 500g	Bakery	1	1
	12	1-3	zv-0000000006	Bread - long bun - 70g	Bakery	1	1
	13	1-3	zv-0000000007	Bread - round bun - 50g	Bakery	2	1
	14	1-3	zv-0000000009	Banana - 5 pieces - 500g	Produce	1	1
	15	1-3	zv-0000000010	Tomato - 1 piece - 100g	Produce	3	1
	16	1-3	zv-0000000011	Patato - pouch - 2kg	Produce	1	1
	17	1-4	zv-0000000041	Corn flakes - box - 500g	Dry food / baki...	1	1
	18	1-4	zv-0000000042	Rice - long grain - box - 1kg	Dry food / baki...	1	1
	19	1-4	zv-0000000040	Spaghetti - box - 454g	Dry food / baki...	3	3
	20	1-4	zv-0000000039	Flour - plain - bag - paper - 1kg	Dry food / baki...	1	1
	21	1-4	zv-0000000038	Sugar - white - bag - paper - 1kg	Dry food / baki...	1	1
	22	1-4	zv-0000000044	Peas and carrots - can - 411g	Canned Food	1	1
	23	1-4	zv-0000000043	Tuna chunks in water - can - 145g	Canned Food	1	3
	24	1-4	zv-0000000020	Oil - olive - bottle - 1l	Cooking Oil	1	1
	25	1-4	zv-0000000019	Oil - rapeseed - bottle PET - 1l	Cooking Oil	1	1
	26	1-5	zv-0000000035	hand soap - liquid - flacon - 221ml	Personal Care	1	1
	27	1-5	zv-0000000031	Body wash - avocado - flacon - 500g	Personal Care	1	1
	28	1-5	zv-0000000047	Shampoo - Classic clean - flacon - 400ml	Personal Care	1	1
	29	1-5	zv-0000000048	Hand cream - Soothing care - tube - 75ml	Personal Care	1	1
	30	1-5	zv-0000000050	Sunscreen - Beach Defense 70 - spray - 184g	Personal Care	1	1
	31	1-5	zv-0000000032	Toothpaste - MaxFresh - tube - 170g	Personal Care	1	1
	32	1-5	zv-0000000049	Toothbrush - Pro-Flex soft - blister	Personal Care	1	1
	33	1-5	zv-0000000036	Razor - Sensor 2 - pouch - 12 pieces	Personal Care	1	1
						67	84

Example of products highlighted by category in the Project Item list

Example of products highlighted by category in the viewing area

List Sort Order

To sort the items in the list according to a desired column content:

1. Click on the desired column header, for example *Position*.
2. Click again to invert the sort order.

To sort the list groups (if any) in the desired order:

1. Click on the group header next to the group icon, for example *Bay Name*.
2. Click again to invert the sort order.

List Column Order

To re-arrange the order of columns in the list:

1. drag any column header left or right to the desired position.

List Presets

This feature lets you save and apply your preferred Project Item List parameters. This is very useful to quickly switch between various types of lists to display on screen and to include in reports.

The following list parameters are stored in the presets:

- Type of items
- Columns
- Grouping
- Highlighting
- Sort order
- Column order

Save Preset

To save the current Project Item List as a preset configuration:

1. Right-click anywhere within the Project Item List panel to show its context menu.
2. Move your mouse cursor on **Presets**
3. Click on **Save As…**.
4. In the List header, next to **Preset:**, type the desired name for the current clist configuration.
5. Click on the **Save** button.
6. The current list configuration is now saved and available for re-use.

Apply Preset

To retrieve and apply a previously saved preset:

1. In the Project Item List header bar, next to **Preset:**, click on the preset list to expand it.
2. Select the desired preset to apply it.

Delete Preset

To remove a previously saved preset:

1. In the Project Item List header bar, next to **Preset:**, click on the preset list to expand it.
2. Select the preset you want to delete.
3. Right-click anywhere within the Project Item List panel.
4. A context menu is displayed.
5. Move your mouse cursor on **Presets**

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6. Click on **Delete** to delete the current preset.

List Panel layout

You can move and resize the Project Item List panel.

List Panel Position

To move the Project Item List panel to a different location on screen:

1. Right-click anywhere within the Project Item List panel to show its context menu.
2. Move your mouse cursor on **Position**
3. Click on **Left, Right, Top** or **Bottom**.
4. The Project Item List is now placed in the selected location.

List Panel Size

To resize the Project Item List panel:

1. Place the mouse cursor on the separation line between the list panel and the visual area. The cursor turns into a double-ended arow.
2. Drag the separation line to the desired location on screen.
3. The panel is now resized.

Display Modes and Options

To change the way you look at your planogram (without modifying it), use the features detailed below. These features are available whenever you can see your planogram project in the viewing area.

Schematic View

When activated, this special view mode shows all the products in your project in a simplified, schematic view.

Activate Schematic View

1. Open the **Display menu** or the **Context menu > Display**.

2. Click on **Schematic View**. (Keyboard shortcut **V**)

3. In schematic view, text labels are displayed on objects as in the example below.
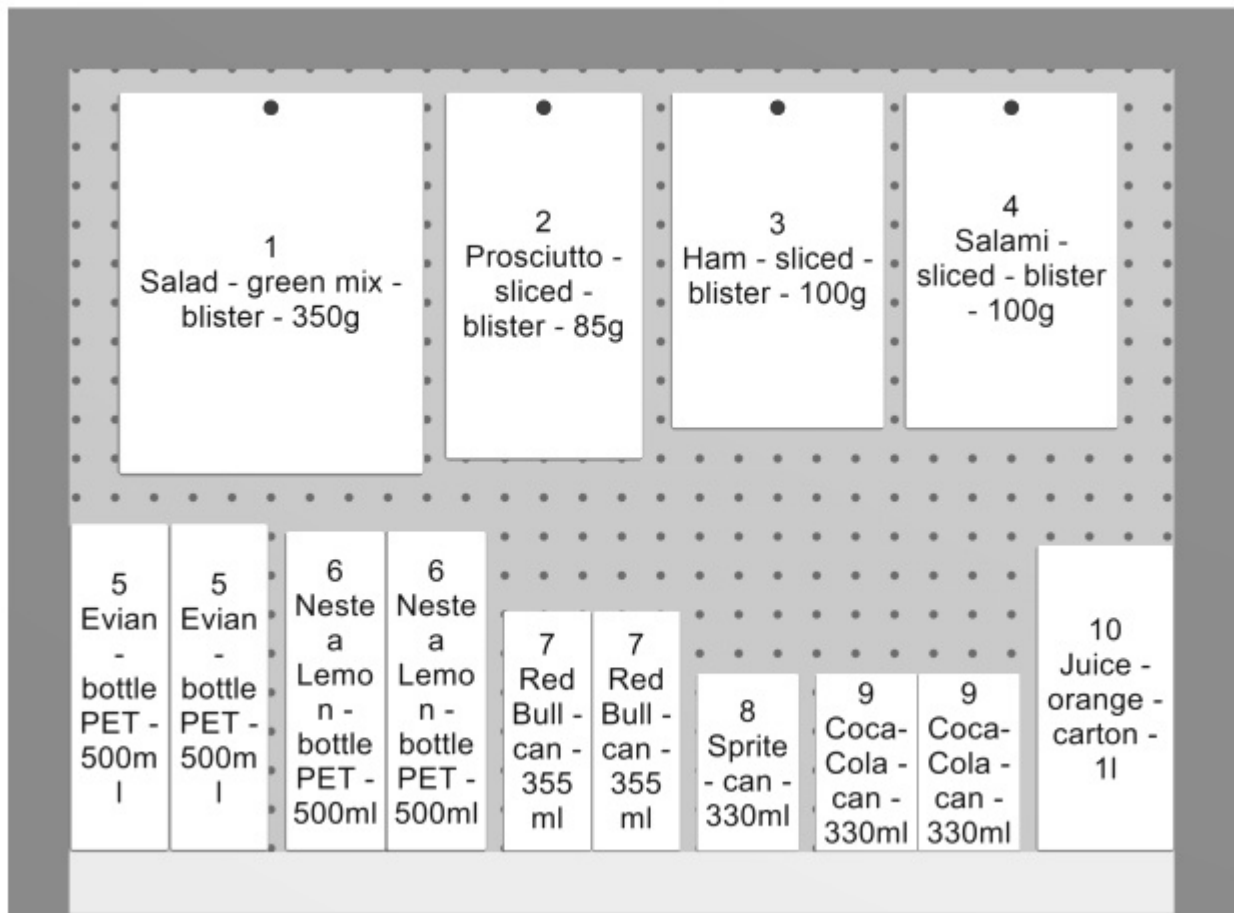
Schematic View Settings

Various options can change how items are displayed in schematic view.

To set these options:

1. click **Settings** on the upper toolbar:

2. Set the options described below.

Note: The choices you make will be remembered for your next PlanogramBuilder session.

Schematic View / Generic Products / Dimensions

Font face

This sets the typeface for the text labels. It also applies to text in dimensions, on generic products and products in the database that use the box shape without picture.

Font height

This sets the text size for text labels. For example make the text smaller to fit the label text on your products.

You can also set the font size interactively. See Font Size.

Under **Schematic View:**

Bay style

Show label displays the name of each bay on a label strip as shown below. Please see Bay Name to find out how to assign names to the bays.
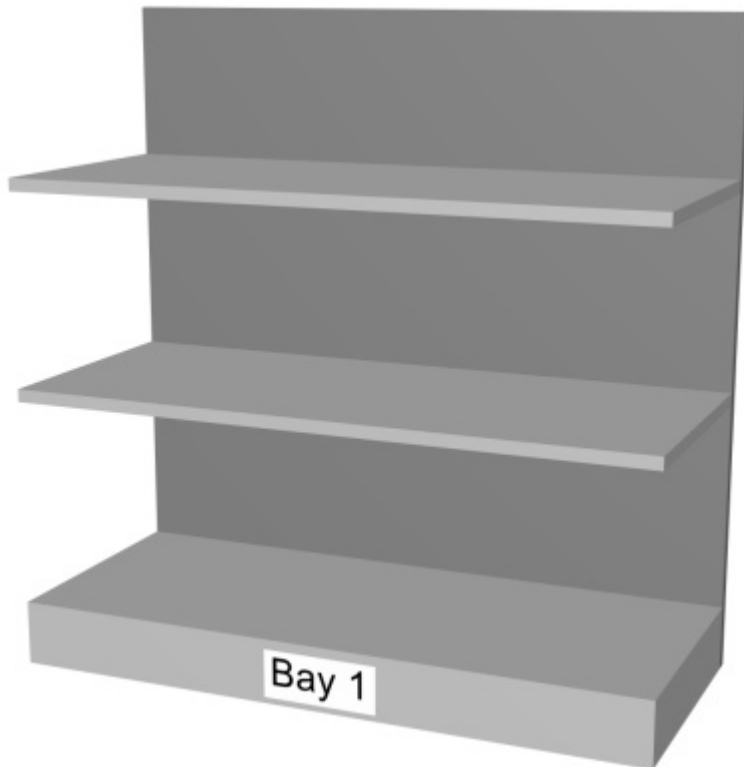
Product style

box & label displays products as simple boxes with their caption printed on the front face:
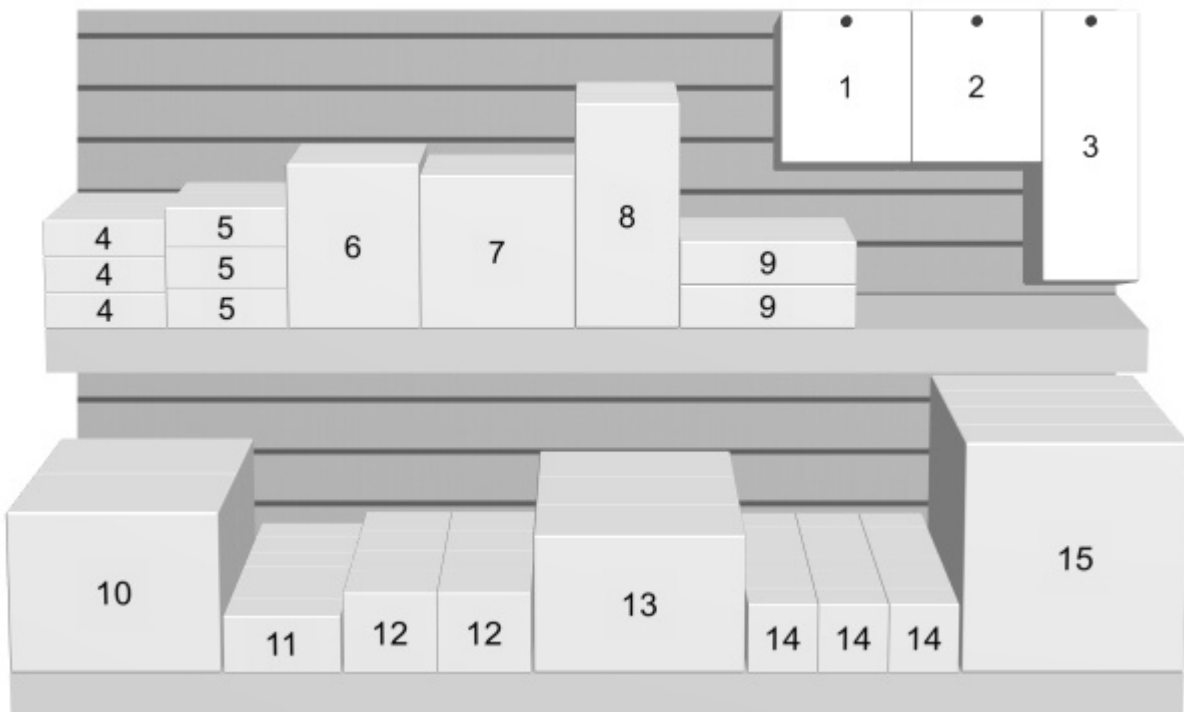
shape & label displays products with their 3D shape, picture and a caption printed as a label strip:

Group labels combines labels for groups of adjacent same products.

When using *Group labels* with the *box & label* style, labels are grouped only vertically (ex: product no5) to help identify the products visually and prevent confusion since there is no visible product picture (ex: product no14):
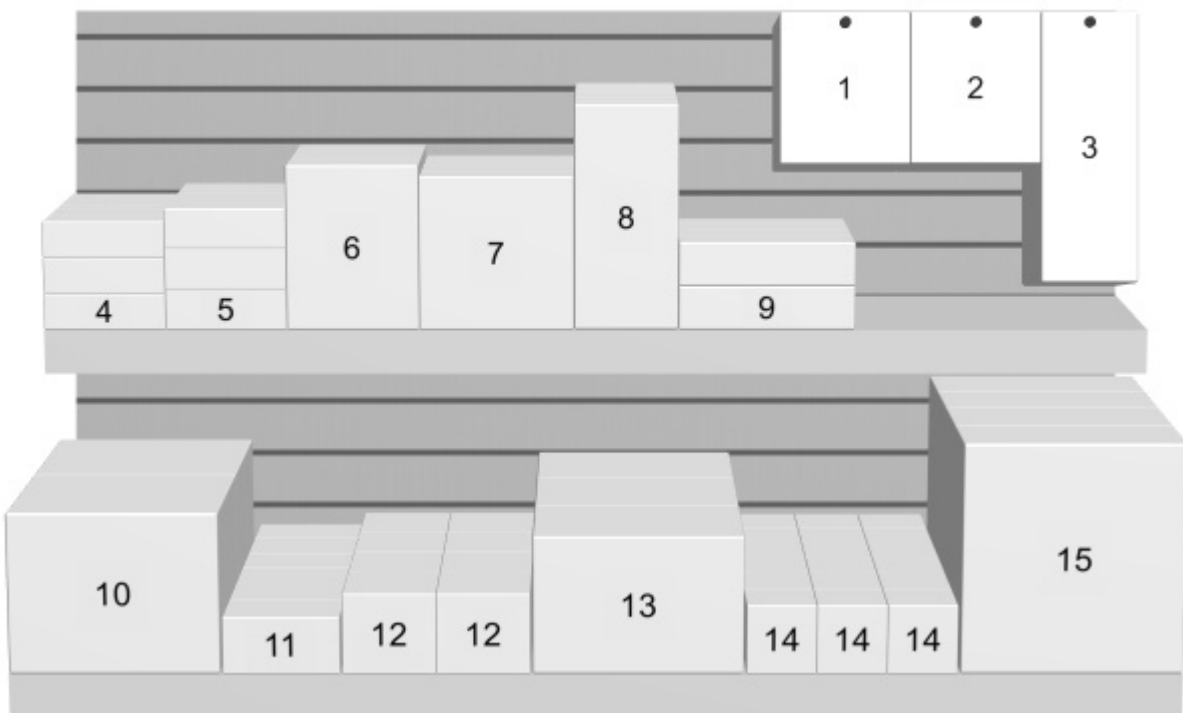
When using *Group labels* with the *shape & label* style, a single label is displayed for adjacent same products:

Label Position defines the vertical position of labels relative to each product.

The following positions are available:

- **Above**: the label lower edge is placed at the product upper edge. (Available only with the *shape & label* product style)

- **Top**: the label upper edge is placed at the product upper edge

- **Center**: the label is centered on the product

- **Bottom**: the label lower edge is placed at the product lower edge

- **Below**: the label upper edge is placed at the product lower edge. In this case, the label is also moved forward in front of the shelf to preserve readability. (Available only with the shape & label product style)

- **On shelf/peg**: the label position varies depending on product style and the product behavior.

- With *shape & label* product style:

   o Pegged products: the label lower edge is placed at the product upper edge.

   o Other products: the label upper edge is placed at the product lower edge.

- With *Box & label* product style:

   o Pegged products: the label upper edge is placed at the product upper edge.

   o Other products: the label lower edge is placed at the product lower edge.

Tip: Combined with the **shape & label** product style, the **On shelf/peg** *label position* resembles the way labels are physically placed in stores.

Label color sets the color of the label background.

Label text color sets the color of the label text.

See below some examples of label positions and color combinations:

Label position: On shelf/peg

Label position: Top

Label position: Center

Label position: Below

Product label

You can choose and combine information to display on the product labels:

Position shows a label with the product position on the bay indexed from left to right, top to bottom. In reports, these numbers can then be published in Report Pictures and used in conjunction with numbers displayed in the Report List to easily identify items in the list and the picture.
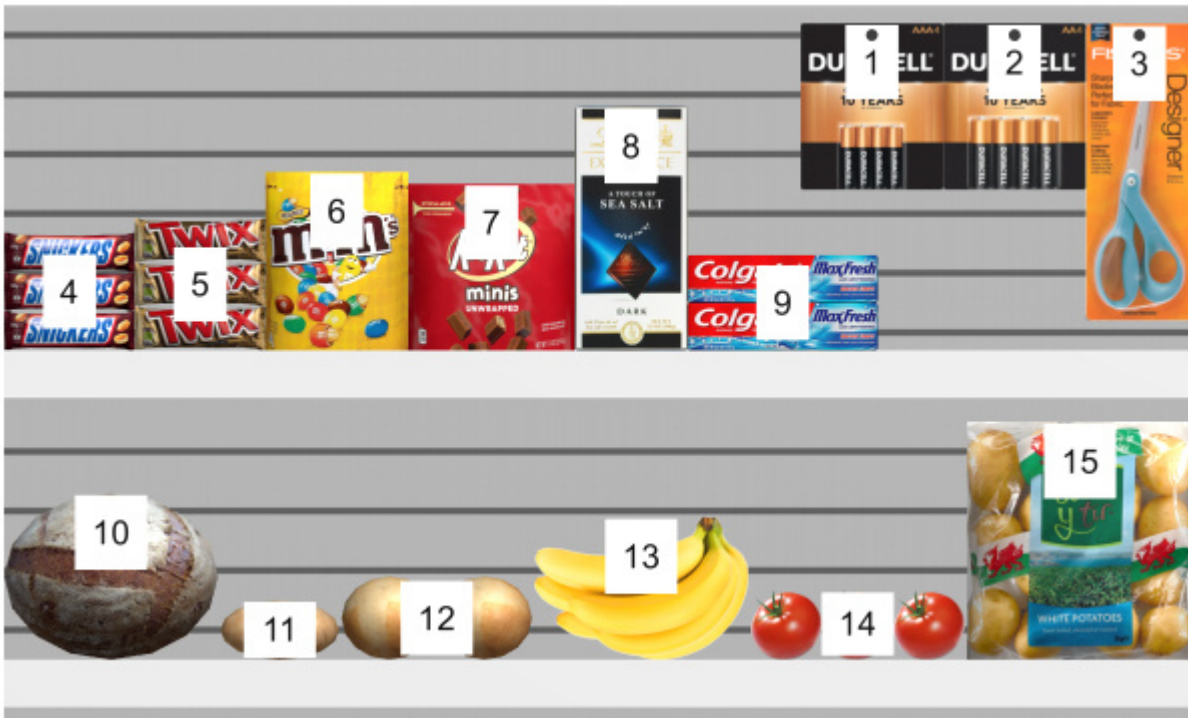
Reference displays products with their unique reference printed on the front face.

Name displays products with their name printed on the front face.

Custom properties: up to 6 additional labels may be available depending on the custom properties defined for your database. Each of them shows products with the value of the selected custom property. See Item Custom Properties for help on these user definable properties.

Facings deep indicates how many depth facings ther eare for each product. See Change Product Facing Count to adjust the number of facings.

Project analysis value lets you show the current Project Analysis result on each product. See Project Analysis to configure the data to display.

Font Size

This tool lets you set the text size for text labels on generic products and products in Schematic view. For example make the text smaller if product labels don't fit on your products.

To change the font size:

1. Select **Font Size** in the **Display menu** or in the **Context menu > Display**.
2. Move your **mouse left/right** or **up/down** to change the font size.

To reset the default value:

1. Select **Font Size** in the **Display menu** or in the **Context menu > Display**.
2. **Left-click** on the viewing area.

Note: The text size can also be specified precisely in the settings. See Schematic View / Generic Products / Dimensions.

Highlight Disabled Items

Products and accessories can be disabled in the Database, so they aren't displayed in the catalog (see Database Item Properties). However, if you open a project which contains disabled items, these are loaded and display on your bays because they still exist in the database.

You can visually identify the disabled items in the current project as follows:

1. Open the **Display menu** or the **Context menu > Display**.
2. Click on the command **Highlight Disabled Items**.
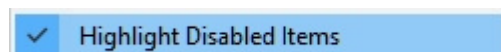
3. Now you can see disabled items **in red** as in the example below.

---

4. Simply click on this command again to disable it.

Note: If you disable items in the database while they are in the currently opened project, the disabled items will only be highlighted when you reload the project.

Highlight Overlapping Items

This feature helps visualizing areas of physical overlap between products and between product and bay elements.

This is especially useful if you have disabled collision detection, because in this case items can easily be mistakenly placed with overlaps.

1. Open the Display menu or the Context menu > Display.

2. Click on Highlight Overlapping Items.

3. Now you can see a yellow color highlight on the products which overlap other products or bay elements.
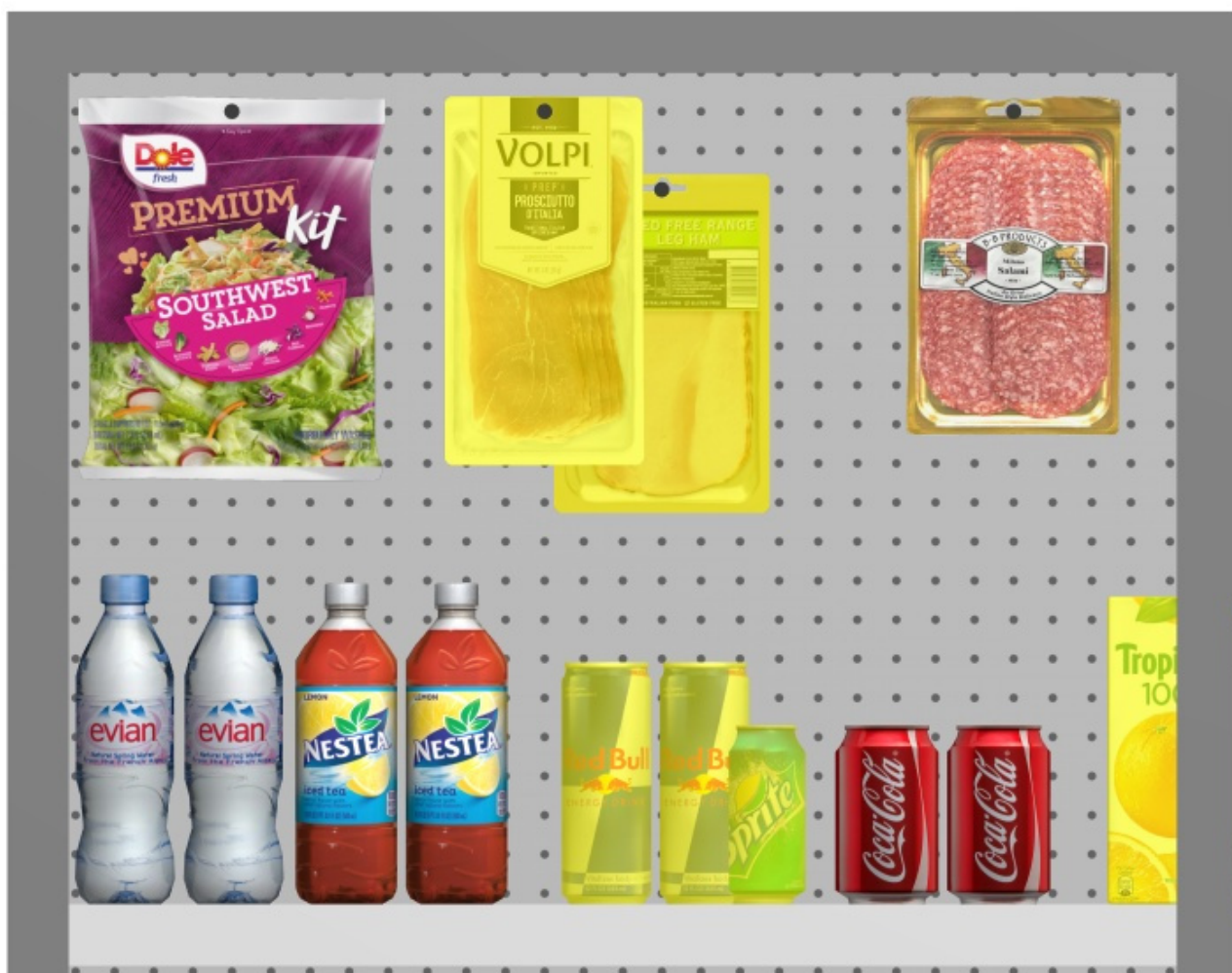
Show the Room

This toggles the visibility of the Room onscreen. Hiding the room is typically useful when it blocks the view while working with bays or products.

Note: This command is not available in **Room** task to allow for editing the room.

1. Open the **Display menu**.

2. Click on the command named **Show the room**.
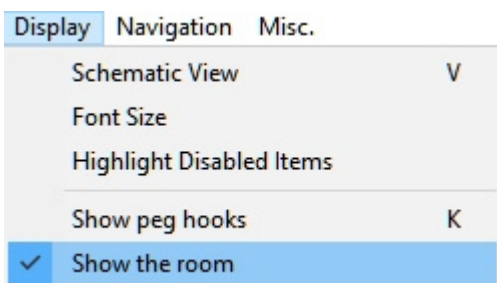
3. The visibility of all room elements has now been toggled.

Tip: this command is also available in the **Context menu > Display**.

Show Front Panels

If you have created a front panel covering your shelves, such as a glass door on a cooler, you will not be able to select any products behind the *front panel*. In such case you can use this command to toggle the visibility of all front panels. Hiding *front panels* lets you select and edit products behind the panels. You can then display the *front panels* again once your planogram is ready to publish.

1. Open the **Display menu**.

2. Uncheck **Show Front Panels**.
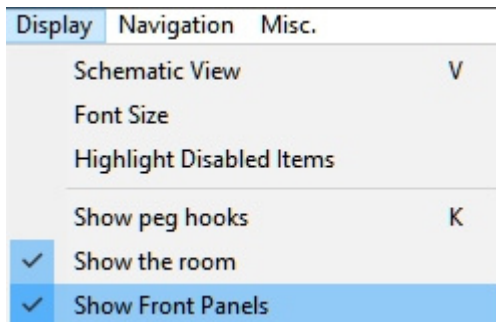
3. The *front panels* are now hidden.

Tip: this command is also available in the **Context menu > Display**.

Show Peg Hooks

This command toggles displaying the actual hooks of pegged products. Showing the hooks can help visualizing where the peg is located exactly, including any offset.

1. Open the **Display menu**.

2. Select **Show Peg Hooks**.
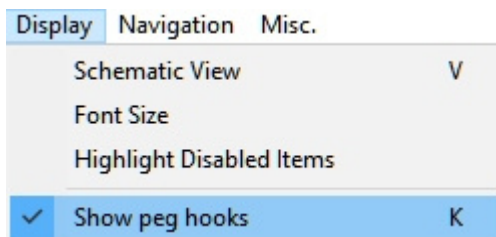
3. The peg hooks are now displayed as shown below.

4. Repeat the same command to hide the peg hooks.

Tip: this command is also available in the **Context menu > Display**.

Note: The offset can be previewed in database Editor if *Show Peg Hooks* is ON.

Note: To define the peg length, please see Back Panel Hook length.

Orthographic View

When activated, this display mode removes any perspective effect: this is called an orthographic view.

1. Open the **Display menu** or the **Context menu > Display**.
2. Click on **Orthographic View**. (Keyboard shortcut **H**)

Tip: If you combine **Orthographic View** with the Default view command, you will notice that all products appear to be exactly facing the screen, without any perspective effect, as in the example below.

Tip: The Orthographic View is particularly useful when you need to export an image of your project as if it was a 2D facing.

To disable Orthographic View:

1. Open the **Display menu** or the **Context menu > Display**.
2. Click on **Orthographic View** again to disable it. (Keyboard shortcut **H**)

The planogram is now displayed in **perspective** view as below:

Stereo Vision

When activated, this feature displays the viewing area in stereoscopic anaglyph mode. Providing you have a pair of red/cyan glasses, you can then perceive the 3D depth of the view.

Activate Stereo Vision

1. Open the **Display menu** or the **Context menu > Display**.
2. Click on **Stereo Vision**.

Stereo Vision Settings

Stereo Effect Strength lets you adjust the amount of stereo effect, by changing the separation distances between the left and right images. This helps matching your physical eye separation.

1. Open the **Display menu** or the **Context menu > Display.**
2. Turn on **Stereo Vision.**
3. Put your red/cyan glasses on.
4. Activate the **Stereo Effect Strength** tool from the **Display menu**.
5. **Move your mouse up or down** to increase or decrease the effect.

Tip: We advise using a minimal effect in order to avoid ghost images and headaches.

Tip: While the tool is active, you can click on the viewing area to reset the default value.

Grid

You can display a grid helper on the floor plane. The grid can be used to position bays and room elements by snapping them on the grid lines and intersections.

Show Grid

1. Open the **Display menu** or the **Context menu > Display**.

2. Select the command named **Show grid**. (keyboard shortcut **G**)

3. The viewing area now displays a grid helper on the floor.

Grid Settings

1. click **Settings** on the upper toolbar:

2. Set the **Grid Spacing** value:
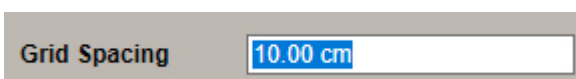
This parameter sets the distance between thin lines on the grid. Change the value as needed.

Note: By default, if the measurement unit is set to *mm* or *cm*, the grid shows thin lines every 10 cm and thicker lines every 100 cm. If your measurement unit is set to *inch*, the grid shows thin lines every 10" and thicker lines every 100". (See Measurement unit.)

Dimension Lines

You can display onscreen the dimensions of your planogram room elements, bays, bay elements and items.

Show Dimensions

To Show Dimensions:

1. Open the **Display menu** or the **Context menu > Display**.

2. Select the menu item named **Show dimensions**. (keyboard shortcut **D**)

Show dimensions	D

3. Depending on the context, various dimensions are displayed onscreen:

By default, the overall *width*, *depth* and *height* are shown for each isolated bay and each group of adjacent bays (bay clusters).
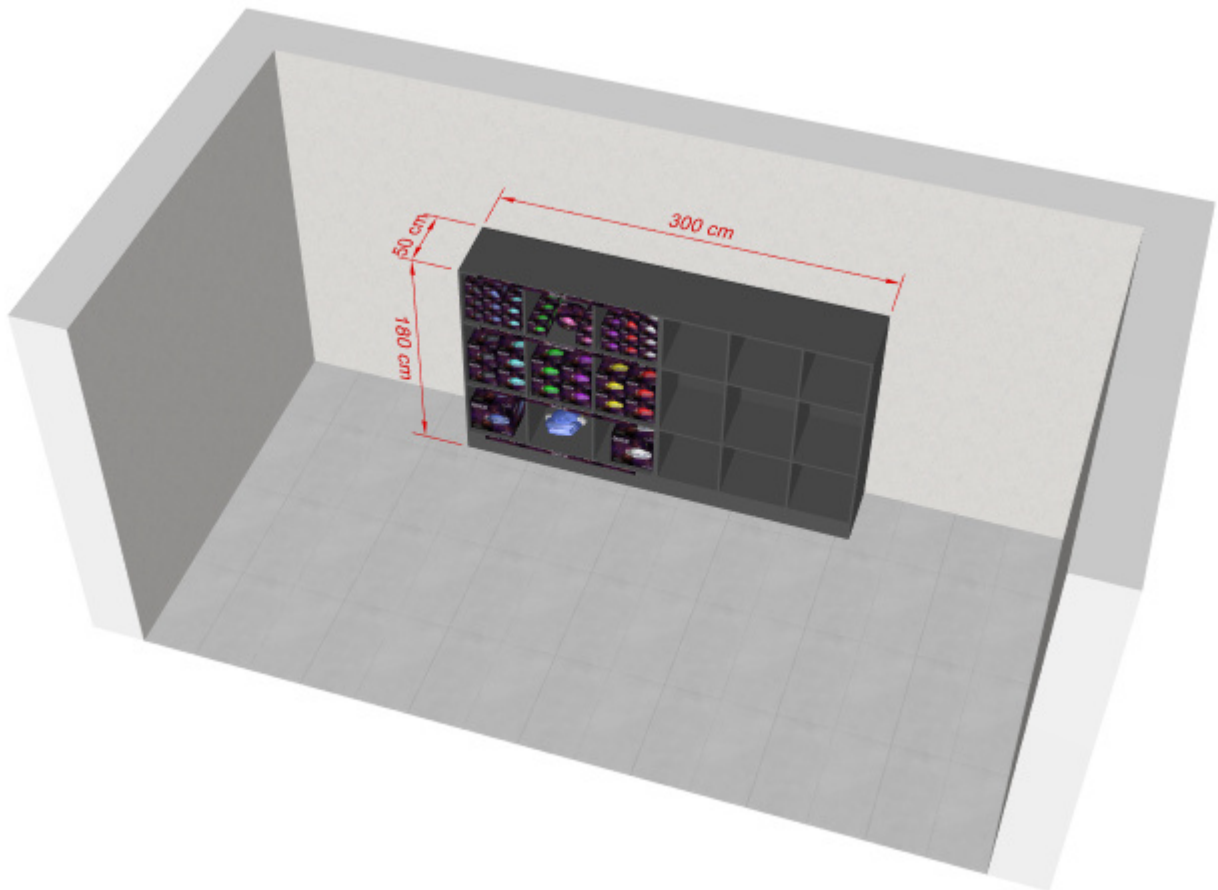
Additionally, for each bay with at least one selected shelf, *vertical shelf measures* are shown. And for each bay with at least one selected divider, *lateral distances between dividers* are displayed.
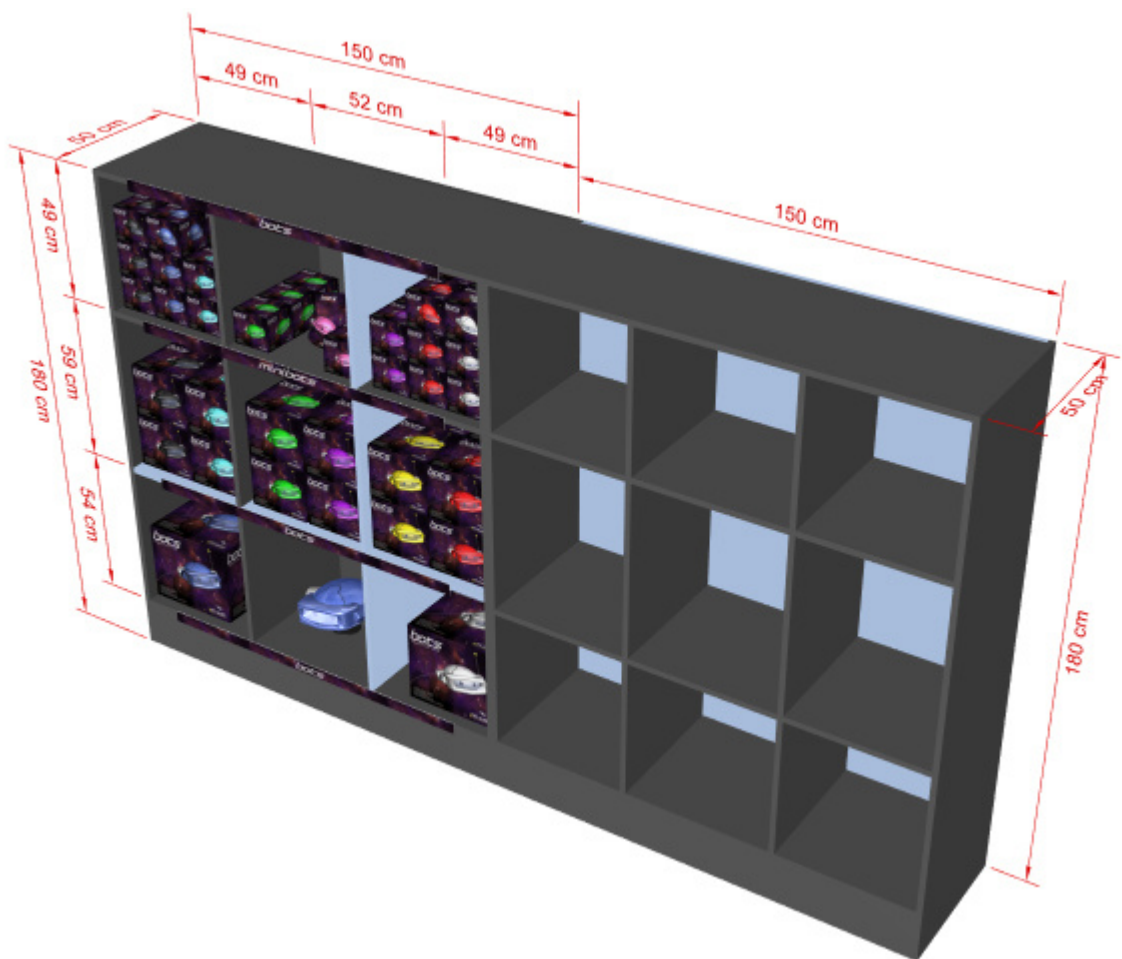
Additionally, the overall *width*, *depth* and *height* of each **selected** room element are also displayed.
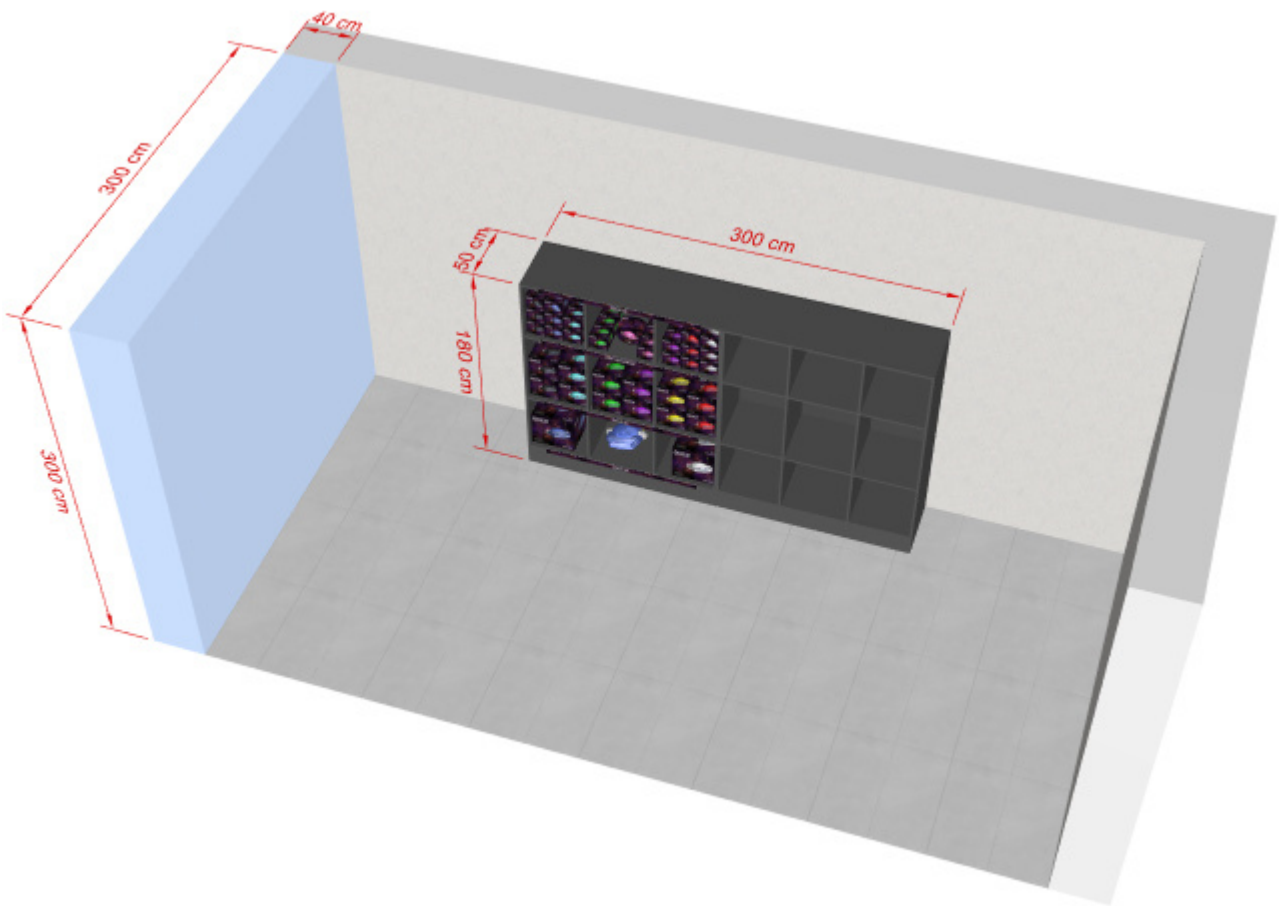
The dimensions of any bay, bay element or product facing are also displayed when clicking on one of its round handle in the corresponding Edit mode. Example:
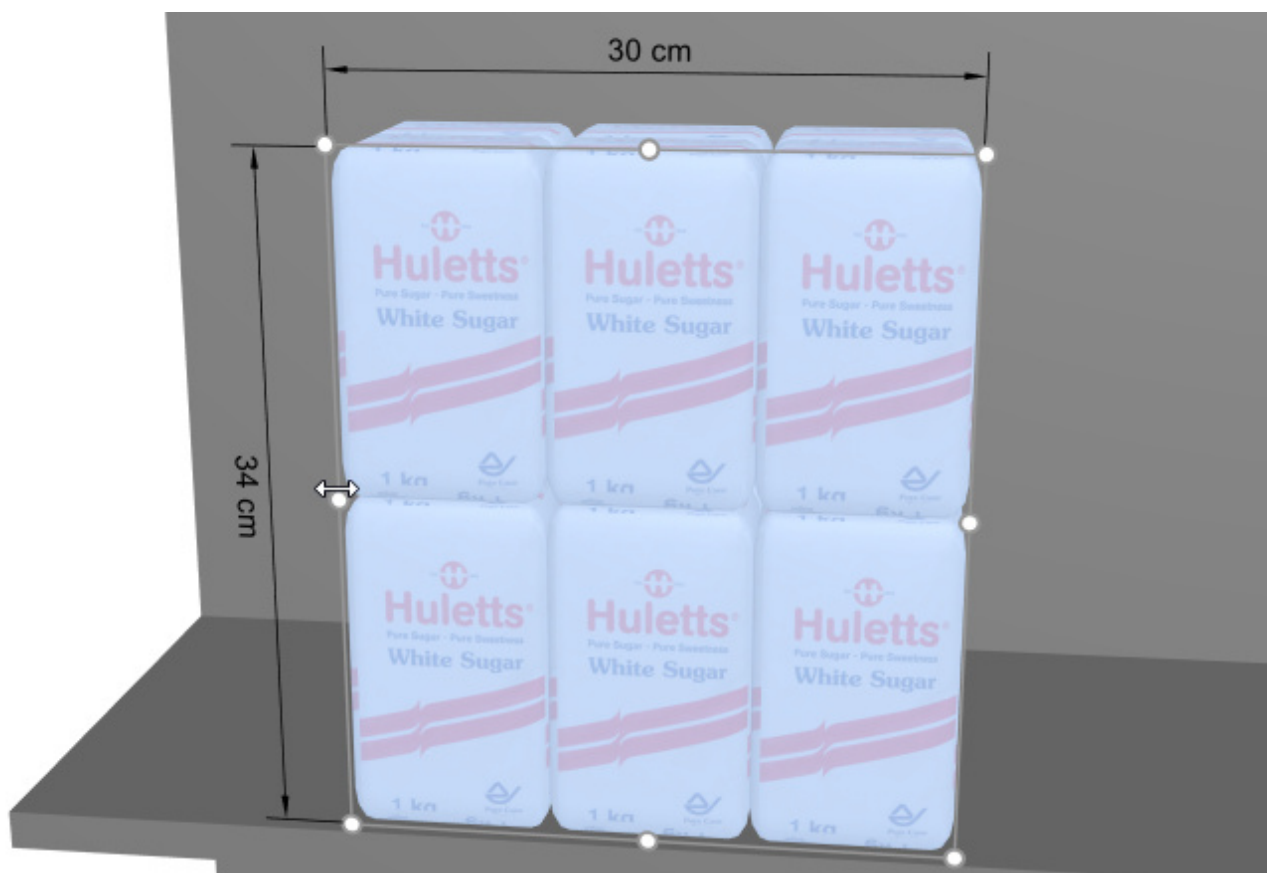
To hide the Dimension Lines:

1. Simply click on the **Show Dimensions** menu item again.

Important: A dimension is only displayed if the viewing angle and the available space allows. If you can't see a desired dimension, *orbit*, *zoom* and *pan* the view to accommodate for it.

Dimension Settings

You can set the following parameters for dimension text and lines:

1. click **Settings** on the upper toolbar:

2. Set the options under **Schematic View / Generic Products / Dimensions**:

Font face

This sets the typeface for the Dimension Lines. It also applies to text labels on generic products, in schematic view and on products in the database that use the box shape without picture.

Dimension color
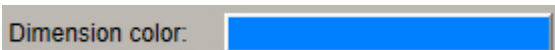
This sets the color of the dimension lines and text.

Dimension font height
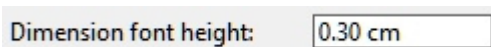
This sets the font height for dimensions. The size of the dimension arrows is adjusted accordingly. The exception is in the Publish task where the dimension text and arrows are shown onscreen as a scaled preview of the Picture output based on the chosen PPI.

Note: The **measurement unit** used for dimensions is the same as specified for all the application in *Settings > Measurement unit* (see Measurement unit).

Show Edges

You can display geometric edges of various elements as visible lines onscreen and in published images. This is useful to help distinguish each product and bay element in your planograms.

To show edges:

1. Open the Display menu or the Context menu > Display.

2. Click on Show edges (Keyboard shortcut E).

The edges are now drawn for the following cases and objects:

- For all room and bay elements (including the bay preview in *Create Bay* task)

- For products which use the *box* shape and have no image applied.

- For generic products (see Add Generic Products)

- For all products, when *Schematic View* is ON (see Activate Schematic View) and *Products style* is set to *Box & label* in the user settings (see Product style).

Show edges in Schematic view with Box & label product style

Show edges in non-schematic view

Show Flow Direction

The flow directions defined for each bay in your project can be shown onscreen as arrows.

1. Open the **Display menu** or the **Context menu > Display**.

2. Select **Show Flow Direction**.
3. The flow direction arrows are now displayed as shown below.

4. Repeat the same command to hide the flow direction arrows.

Important Note: If no flow direction has been set for your bays, this command has no effect. See Bay Flow Direction for details on how to set the flow direction for your bays.

Background

This section shows you how to change the Background of your planograms.

Background Color

You can change the background color of the viewing area:

1. click **Settings** on the upper toolbar.

2. Click on the color swatch next to **Background Color**.

3. Set the value by picking any color from the **color popup dialog**. (default color: white)
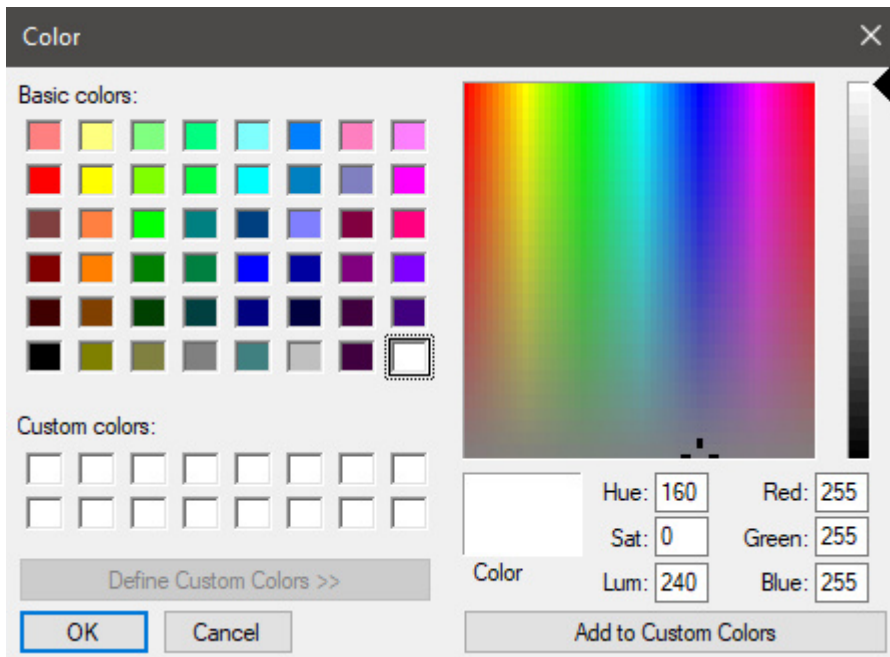
4. Click OK to confirm.

Note: When you change the background color, the latest color is saved in your account and re-used for new projects.

Note: The current background color is also used when publishing Single Pictures.

Note: The current background color is NOT used when publishing Report Pictures because reports have their own background color setting overriding the viewing area background.

Background Picture

You can also upload an image to use as the background for your planograms:

1. click **Settings** on the upper toolbar.

2. Under *Settings affecting the current user only*, below *Background Picture*, click **Browse...**

3. Select a picture on your hard drive.

4. Click on **Open**.

To remove the background picture, click on the small **red cross** button**.**

Note: The background picture is saved per user and applies to all projects.

Note: The current background picture is also used when publishing Single Pictures.

Note: The current background picture is NOT used when publishing Report Pictures.

Warning: If you delete the image from your computer, or if you open PlanogramBuilder from a different computer, the background image won't be displayed.

Tip: If you have taken a photograph of the store area where you project will be implemented, you can use a photo as the background and see your project in situation. Example below:

Lighting

PlanogramBuilder comes with a predefined lighting that should be fine for most projects. It is however possible to modify the lighting.

Below are examples of two different lighting settings:

Standard lighting   *Custom lighting*

Lighting Intensity

1. Open the **Display menu** or the **Context menu > Display**.

2. Select **Lighting Intensity.**

3. To increase and decrease the light intensity, **move your mouse up and down with the left button pressed**.

4. **Release** your mouse button once you are happy with the light level.

Note: The new lighting intensity is saved as a user preference. It is applied to all existing and new projects.

Tip: While the tool is active, you can click on the viewing area to reset the default value.

Lighting Direction

1. Open the **Display menu** or the **Context menu > Display**.

2. Select **Lighting Direction.**

3. To change the angle of the lighting, **move the mouse around with the left button pressed**. Release your mouse button once you are happy with the light orientation..

4. **Release** your mouse button once you are happy with the light direction.

Note: The new lighting direction is saved as a user preference. It is applied to all existing and new projects.

Tip: While the tool is active, you can click on the viewing area to reset the default value.

Fullscreen

The **Fullscreen** command switches the viewing area to full screen. In this mode, there are no more buttons, but you can use the right-click context menu or use keyboard shortcuts (See Keyboard Shortcuts). Press the *Esc* key to exit full screen.

Tip: this command is also available in the **Display menu** or the **Context menu > Display**.

On-screen Visual Quality

You can set the viewing area visual quality to accommodate for the performance of your computer.

1. Click on **Settings**

2. Under **Viewing & Editing**, check or uncheck **Antialias while moving**.
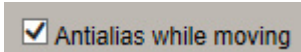
- When checked, the on-screen image is always antialiased (smoothed) even while navigating the view or Move Items in your planogram.

- When unchecked, the 3D on-screen image is antialiased only when static. The image quality is a little harsher while moving objects or the view. Choose this setting if you experience slow response while moving the view or objects.

Note: This setting has no effect on the quality of images that you output from PlanogramBuilder, such as in reports. These images are always antialiased.

Import Project

The Import Project task lets you generate a visual planogram automatically from a listing of products and accessories defined in a spreadsheet application such as Microsoft Excel.

Import Project Workflow

Here is a typical workflow to import a project from a spreadsheet into PlanogramBuilder.

1. If you wish to use a predefined bay, create an empty bay to the desired dimensions in PlanogramBuilder. Save the empty bay as a project.

2. Open your spreadsheet application and create a new sheet referencing all the items you want to import. Save the file in *.xls* or *.xlsx* format.

3. In PlanogramBuilder, open the *Import Project* task and use one of the 3 import modes.

4. Optionally, edit and re-save your spreadsheet as many times as you wish to update the imported planogram.

Import Project Screen
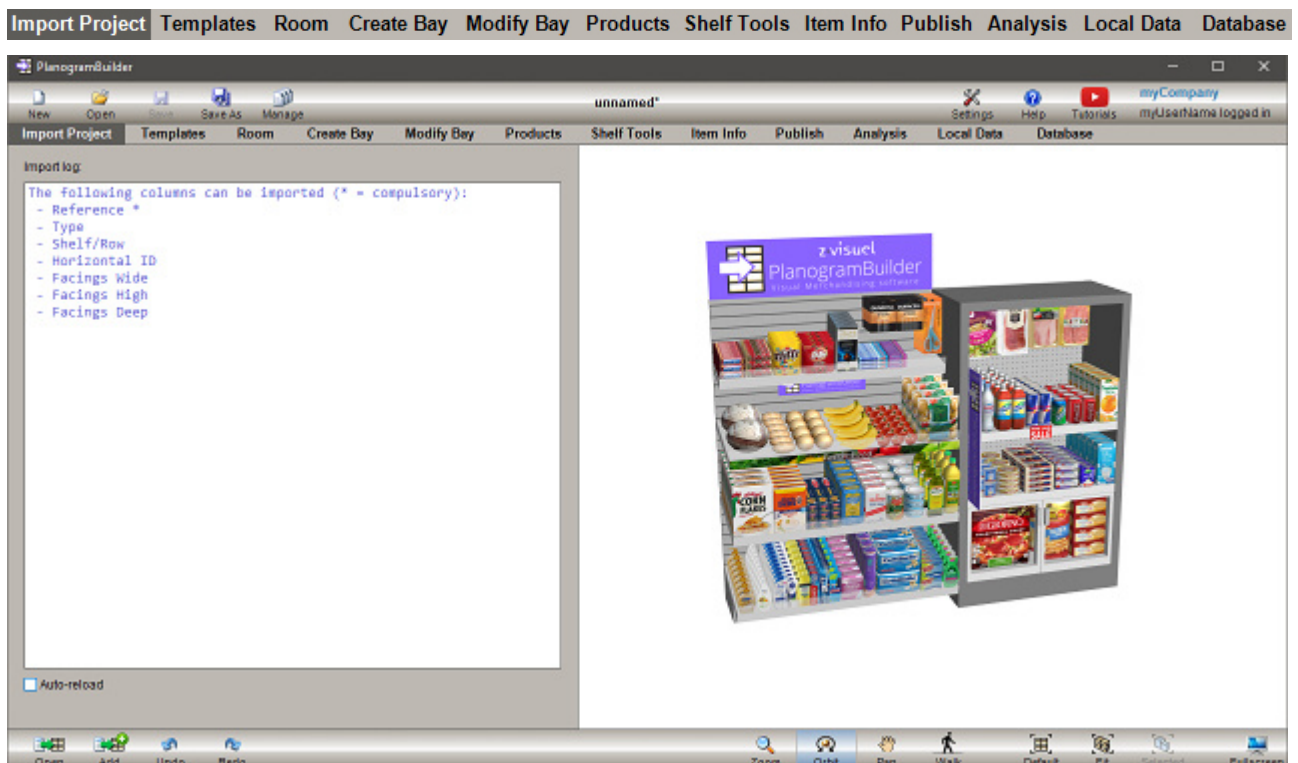
Import Project Tools

The importer provides **3 import modes** shown in the above screenshot suitable for various use cases.

In the **viewing area** on the right of the screen you can see the result of the import process.

Open

Lets you import an Excel file one time as a new project.
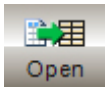
Add

Lets you imports an Excel file one time as an addition to the current project. This is useful if you want to import several bays in the same project.

Auto-reload

When checked, PlanogramBuilder imports your Excel file as a new project every time you save the Excel file. This lets you edit your planogram in real-time in your Spreadsheet application. PlanogramBuilder updates the visual result automatically.

In this mode, the Open and Add buttons are disabled.
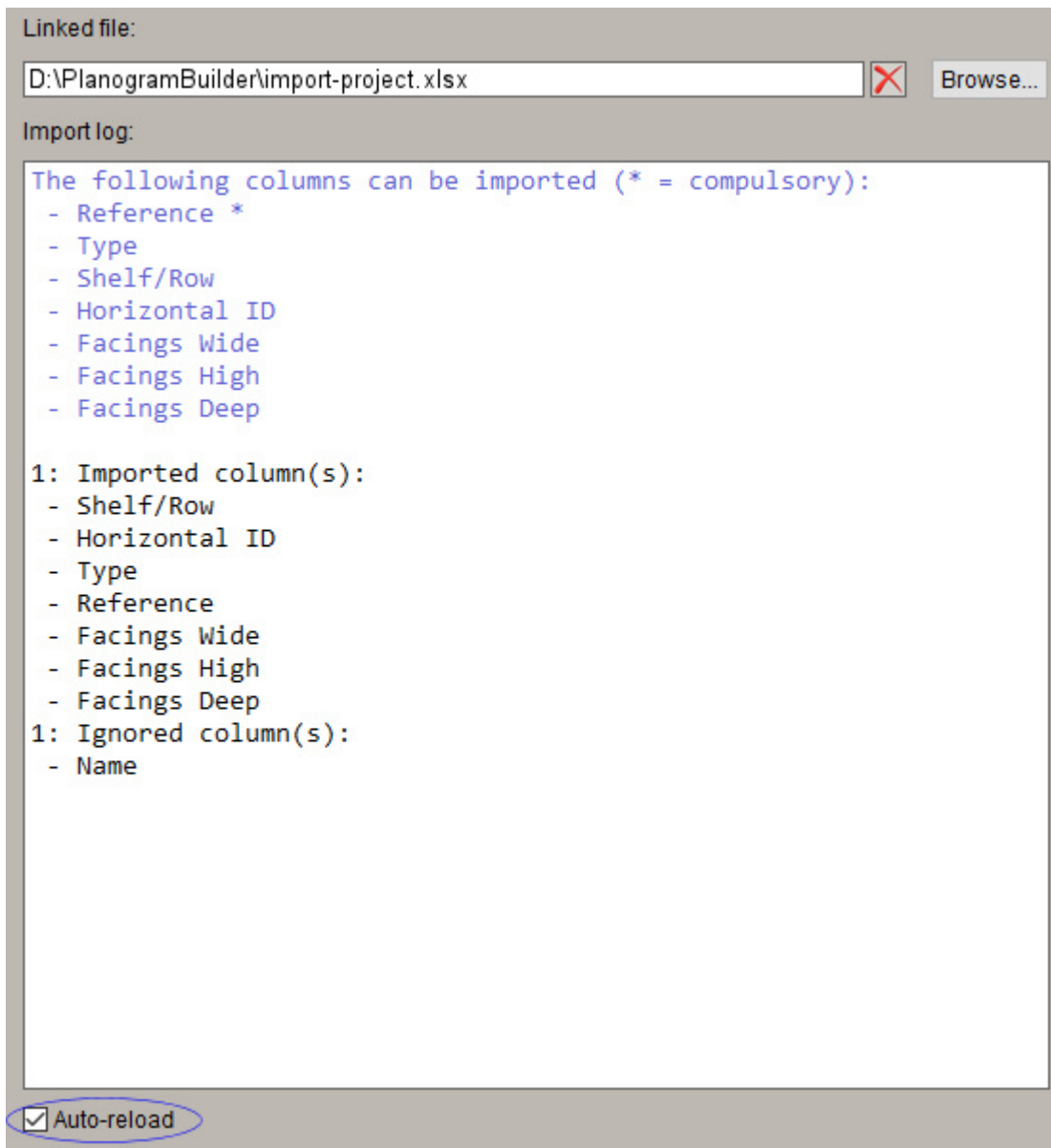
Import Project Log

This area shows the following information:

- In **blue** text, to help you prepare your input spreadsheet: list of supported columns
- In **black** text, once you've imported a file: list of imported and ignored columns.
- In **red** text, once you've imported a file: list of errors

Import Project Syntax

Your Excel file must contain some compulsory information and can have some optional data as well.

Each line in the spreadsheet represents one reference to import.

There are various types of items, each supporting specific parameters. The type of items and the parameters are each represented by one column in your file.

Example of file to import:

Shelf/Row	Horizontal ID	Type	Reference	Name	Facings Wide	Facings High	Facings Deep
		project	sample empty bay for project import				
		placement	fill width				
		spacing					
		shelf tool	zv-0000000065	PlanogramBuilder Header - board - 100cm			
1	1		zv-0000000052	Snickers - wrap plastic -	1	3	auto
1	2		zv-0000000055	Twix - wrap plastic - 50g	1	3	auto
1	3		zv-0000000053	M&M's - pouch - 185g	1	1	auto
1	4		zv-0000000064	Kit Kat Minis unwrapped -	1	1	auto
1	5		zv-0000000056	Lindt Excellence - Dark S	1	13	auto
1	6		zv-0000000060	Stimorol Wild Cherry - wr	1	5	auto
1	7		zv-0000000061	Duracell AA alkaline - 4p	1	1	auto
1	8		zv-0000000063	Duracell AAA alkaline - 4	1	1	auto
1	9		zv-0000000062	Scissors - Designer 20cn	1	1	auto
2	1	shelf tool	zv-0000000067	Shelf strip - Fresh Food - card strip - 100cm			
2	2		zv-0000000005	Bread - round loaf - 500g	1	1	auto
2	3		zv-0000000006	Bread - long bun - 70g	1	1	auto
2	4		zv-0000000007	Bread - round bun - 50g	2	1	auto
2	5		zv-0000000009	Banana - 5 pieces - 500g	1	1	auto
2	6		zv-0000000010	Tomato - 1 piece - 100g	3	1	auto
2	7		zv-0000000011	Patato - pouch - 2kg	1	1	auto
3	1		zv-0000000041	Corn flakes - box - 500g	1	1	auto
3	2		zv-0000000042	Rice - long grain - box - 1	1	1	auto
3	3		zv-0000000039	Flour - plain - bag - paper	1	1	auto
3	4		zv-0000000038	Sugar - white - bag - pap	1	1	auto
3	5		zv-0000000044	Peas and carrots - can -	1	1	auto
3	6		zv-0000000043	Tuna chunks in water - c	1	3	auto
3	7		zv-0000000001	Coca-Cola - can - 330ml	1	1	auto
3	8		zv-0000000004	Evian - bottle PET - 500ml	1	1	auto
3	9		zv-0000000020	Oil - olive - bottle - 1l	1	1	auto
3	10		zv-0000000019	Oil - rapeseed - bottle PET	1	1	auto
4	1		zv-0000000035	hand soap - liquid - flacor	1	1	auto
4	2		zv-0000000031	Body wash - avocado - f	1	1	auto
4	3		zv-0000000047	Shampoo - Classic clean	1	1	auto
4	4		zv-0000000048	Hand cream - Soothing ca	1	1	auto
4	5		zv-0000000050	Sunscreen - Beach Defer	1	1	auto
4	6		zv-0000000032	Toothpaste - MaxFresh -	1	1	auto
4	7		zv-0000000049	Toothbrush - Pro-Flex sot	1	1	auto
4	9		zv-0000000034	Sanitary napkins - box - 3	1	1	auto
4	10		zv-0000000046	Make-up pads - bag - 80	1	1	auto
4	11		zv-0000000037	Toilet paper - Cottonelle -	1	2	auto
4	12		zv-0000000045	Sponge - non-scratch - v	1	2	auto
4	13		zv-0000000033	Dishwasing liquid - flacor	1	1	auto

The table below shows the available parameters and values for each type of items.

type	reference	shelf/Row	Horizontal ID	Facings Wide	Facings High	Facings Deep	Behavior
project	project name	N/A	N/A	N/A	N/A	N/A	N/A
placement	center / fill width / left / right	N/A	N/A	N/A	N/A	N/A	N/A

spacing	float number in current meas. unit (ex: 2.5)	N/A	N/A	N/A	N/A	N/A	N/A
product	The product reference	integer number (ex: 2)	integer number (ex: 2)	integer number (ex: 2)	integer number (ex: 2)	integer number (ex: 2)	the product behavior
accessory	The accessory reference	integer number (ex: 2)	integer number (ex: 2)	integer number (ex: 2)	integer number (ex: 2)	integer number (ex: 2)	the accessory behavior
space	N/A	N/A	integer number (ex: 2)	N/A	N/A	N/A	N/A
section	The section name	integer number (ex: 2)	integer number (ex: 2)	integer number (ex: 2)	N/A	integer number (ex: 2)	N/A
section start	The section name	N/A	N/A	N/A	N/A	N/A	N/A

Item Types

Import Project Templates Room Create Bay Modify Bay Products Shelf Tools Item Info Publish Analysis Local Data Database

In your spreadsheet, a column labeled **type** lets you specify the type of item you to import. This column is required unless you want to import only items of the type product.

Available item types are:

project

This type of item lets you reference a previously saved project as a container for the products and accessories to import.

To place products in the referenced project, add one line with the project type and enter the name of one of your planogram projects under reference. The importer will load the referenced project and try to place the items listed in your spreadsheet on the first bay of the referenced project.

To generate a generic bay automatically based on the space required by the imported items, don't add a project line or specify no project name under reference.

Note: If the referenced project cannot be found, the importer creates a generic bay.

Note: If there are several projects with the specified name, the imported uses the most recently saved project amongst those.

placement

This item can be used to specify the way products are distributed on shelves. Two values are allowed for placement under reference:

center: (default value if empty). upon import, all items are placed as close to each others (also taking into account the above spacing value) and centered on the center of the shelf.

fill width: upon import, all items are distributed with equal spacing so as to fill the whole width of the screen.

left: upon import, all items are placed as close to each others (also taking into account the above spacing value) and pushed against the left edge of the shelf.

right: upon import, all items are placed as close to each others (also taking into account the above spacing value) and pushed against the right edge of the shelf.

Note 1: This parameter is only effective on shelves that contain only *products*. For shelves which also include *accessories*, the items are placed as if the value *left* was specified.

Note 2: If the spacing value is higher than the calculated space for placement, items are placed according to the spacing value. In this case if there is not enough room on a referenced project bay, some items may not be placed in the planogram.

spacing

A line of this type can be used to specify the desired lateral space between imported items in your current measurement units (as set in Settings). Enter the distance for spacing as a number in the reference column on this line. Enter 0 if you want your products adjacent or automatically spread on the shelf width with *fill width* placement.

product

(this is the default value if no type is specified). Enter this type on each line that references a product. Enter the product *reference* as value in the *reference* column.

Note: *Pegged* products can be imported, but they require a physical shelf on the bay referenced by *project*. If there is no referenced project in your Excel file, shelves are automatically created for pegged products. Please note that you can and should indeed delete these "extra" shelves after import without removing the pegged products.

accessory

Enter this type on each line that references a accessory. Enter the accessory *reference* as value in the *reference* column.

Note: *Accessories* which don't attach to a shelf can be imported, but their placement may be unpredictable (ex: panels, bay headers). For such Accessories, don't specify a *shelf/row* nor a *Horizontal ID* value in the file to import.

space

Enter this type on a line to create an empty gap between two items. This type of item doesn't need any value under *reference*. The space item is only taken into account by the importer if a *Placement* line with a value of *fill width* is present.

section

This type of items lets you import a whole group of items as defined within the same spreadsheet by a section start. Typically you can use sections to place groups of items which always belong together on the shelves. Enter the name of the section to import under *reference*.

section start

Defines the content of a section (group of items). Enter a representative name for the section under *reference*. All items listed in lines below the section start line become part of the group. The end of the section group is defined by the line above the next section start, or by the end of the file if there is no section start line below. This means you should **always place all section definitions at the end of your file**, below any items that is not part of a section.

Here is an example of a file using a section:

Shelf/Row	Horizontal ID	Type	Reference	Name	Facings Wide	Facings High	Facings Deep
3			z.01.03.02.11	MaxiBot mean cyan	1	2	
3		section	section1		1		1
3			z.01.03.02.07	MaxiBot mean black	1	1	
		section start	section1				
			z.01.02.02.08	MidiBot mean white	1	3	
			z.01.02.02.09	MidiBot mean orange	2	4	2
			z.01.02.02.02	MidiBot mean blue	1	3	

Notes about sections:

Section1 is defined at the end of the file with a *section start* type and 3 products listed below. The second product in the section will be placed twice in width.

Section1 is inserted on shelf *3* at horizontal ID *2*, inbetween z.01.03.02.11 and z.01.03.02.07.

*Horizontal ID*s are incremented for all items including those defined in the section. In this case this means that the item to the right of the section should have an horizontal ID value of *5* to account for the 3 ID's in the section. Of course remember that horizontal Id's are optional, so you can also leave them blank and have items automatically be placed from left to right according to input line order.

Facings Wide is supported in *section*. It will repeat the section in width as per the specified value.

Facings High is not supported at the *section* level.

Facing Deep is supported at the *section* level. It is used only for items with no *Facing* Deep value specified at the *item* level. In the above example, facings deep will be *2* for *MidiBot mean orange*, and *1* for the other items in the section.

Note about Item Types: All the item type values listed above are in English even if you have set PlanogramBuilder to another language.

Item parameters

Import Project　Templates　Room　Create Bay　Modify Bay　Products　Shelf Tools　Item Info　Publish　Analysis　Local Data　Database

The other columns represent parameters for the items to import.

Reference

(compulsory) Use one line per item in this column to specify the reference of each item you want to import.

References with no match in your database are disregarded.

Shelf/Row

Use this column to specify a number for each item telling to which shelf it must be assigned. The numbering scheme is the same than the one used for Publish Reports (topmost shelf number = 1). products assigned to the same shelf are added from left to right following their order of appearance in the input file.

Note: if this column is not there or no value is entered, items are placed from the upmost to the lowest shelf based on the order they appear in the spreadsheet.

Note: if you enter *0* under shelf / Rows for some items, they are treated as "spare products" and placed in a second pass at the right of assigned products (top to bottom).

Horizontal ID

this parameter lets you specify in which order on the shelf from left to right each item is to be placed. Specifying the same value for several products on the same shelf will stack them on a single pile.

Note: If this column is not there or no value is entered, items are placed from left to right on the shelf in the order listed in the Excel file.

Note: mixed product stacks (different references in the same stack) require *Facings Wide = 1* for all products in the stack.

Note: if you don't specify a horizontal ID for products with the **tester** behavior, they are placed on the shelf in front of the closest above product listed in the input file. Ex: If you wish to place *tester A* in front of *product A*, create one line for *product A* and one line just below for *tester A*. Otherwise specify a horizontal ID of the same value.

Facings Wide

Lets you enter an optional number (default = 1 if unspecified) for each product telling how many lateral repeats of the same product must be placed on shelf (see Facings Wide).

Facings High

Lets you enter an optional number (default = 1 if unspecified) to specify how many times the product is stacked vertically (see Facings High).

Facings Deep

Use this column if you wish to specify a fixed number of Facings Deep (see Facings Deep).

Note: if this column is not present, the number of units in depth is automatically calculated based on shelf depth or peg length, as in interactive planogramming.

Note about item parameter column labels: All parameter column labels are indicated in English in this user guide (ex: *Facings High*). You must however use the corresponding column label based on your language setting. Column labels in your language can be retrieved from the database or by publishing a report.

General notes for Import Project:

- Only the first sheet of your spreadsheet is taken into account for import.
- All the above parameter names are case insensitive.
- Blank lines (empty reference cell) in input files are ignored.

Tutorial

Import Project Templates Room Create Bay Modify Bay Products Shelf Tools Item Info Publish Analysis Local Data Database

In this section you will find instructions for testing the Import Project task.

Note: This tutorial is designed to work with the sample projects, products and accessories delivered with PlanogramBuilder. If you have already deleted these sample items, you will need to modify the sample import file to use your own bays and products.

Part 1

You will do a simple import from Excel to PlanogramBuilder.

1. Download the following file and save it on your desktop:

https://planogrambuilder.com/downloads/sample%20files/project%20import%20sample%20input%20file.xlsx

3. Launch PlanogramBuilder

4. Click on the **Manage** button. Verify in the list that you see a project named ***Sample empty bay***. If it's missing:

5. Download the following file and save it on your desktop:
https://planogrambuilder.com/downloads/sample%20files/sample%20empty%20bay.xlsx.

6. Click the **Restore** button.

7. Click **Ok** at the warning.

8. **Select** the downloaded file and click **Open**.

9. Click on the **Import Project** tab to access this task.

10. Click on the **Open** button on the bottom toolbar to open the file *browse* dialog.

11. **Select** and **Open** the file named *project import sample input file.xls*

12. Click **Yes** in the *warning box* if you need to save your current project, otherwise click **No**.

13. Wait for the import to take place and see the results in the visual area.

Part 2

Now you will modify the Excel file and see the resulting changes in real-time. You must complete *Part 1* of this tutorial before doing *part 2*.

14. In PlanogramBuilder, **Import Project** Task, check **Auto-reload**.

15. Click **No** in the warning box: you don't need to save the project imported at part 1.

16. Click on the **Browse** button, **select** and **open** the file named *project import sample input file.xlsx*. In the auto-reload mode, the file is linked to the importer and continuously reloaded to show any changes. You can already see the result of the import process in the viewing area.

17. Now launch your **spreadsheet application** and **open** the input file (*project import sample input file.xlsx*). *Tip*: Try to place PlanogramBuilder and your Spreadsheet application side-by-side on your screen or on two screens if you can. This will let you better see the results of changes you will bring.

18. In the spreadsheet, on line *3*, change the **placement** value from ***fill width*** to ***center***.

19. **Save** the Excel file. This automatically updates the placement of your items in PlanogramBuilder. You can see that all products are pushed to the left and there is some remaining space on the right of the shelves.

20. On lines *21*, change the value of **Facings High** from *1* to *3* to stack more tomatoes.

21. Save the Excel file. This automatically updates the planogram layout in PlanogramBuilder according to the last changes made in *Excel*.

22. You can continue to test various changes in your spreadsheet, such as removing the project reference to have a bay automatically generated.

Publish

The **Publish** task lets you create images and reports of your planogram projects so you can communicate your guidelines to the persons in charge of setting-up the products in the stores.

Single Pictures

The **Single Pictures** feature lets you output images of what you see in the viewing area. Your current onscreen Display Modes and Options are maintained in your output pictures except for the Grid which is always *Off* in output pictures.

This feature is useful to create simple and quick planogram images or images from custom viewpoints.

Pictures can be placed in the Windows clipboard or saved to a variety of image file formats.

Tip: If you want to publish reports with a product list and pictures, please see Reports.

Single picture commands

There are two ways to save pictures:

Copy picture

The **Copy picture** command on the bottom toolbar takes a snapshot of your project as it appears in the viewing area and saves it to the clipboard. You can then directly paste it in another application like Microsoft ® Word, PowerPoint, etc.

Save picture

Click the **Save picture** button to save an image of your project as it appears in the viewing area to your local hard disk. You will be requested to select a destination folder and a filename.
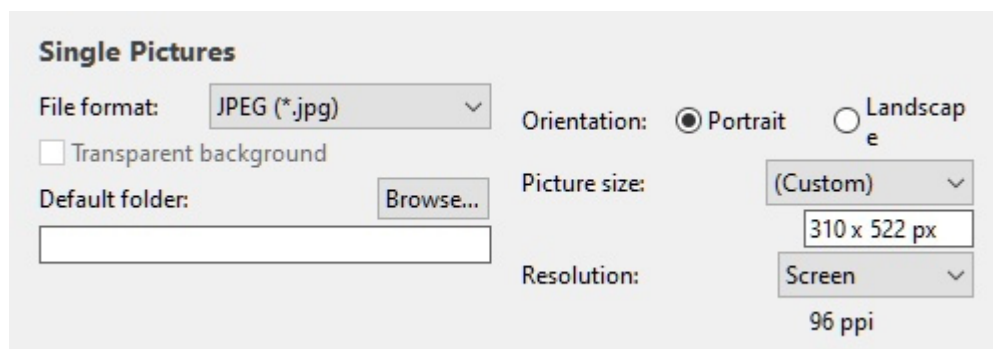
Note: Use the **File format** drop-down list to define in which format the pictures are saved.

Single picture parameters

There are several options to personalize your pictures. All the options below are saved by the application for the next time you use PlanogramBuilder.

File Format

Provides a choice of file formats to save the pictures. Available formats are:

- **JPG** (Joint Photographic Experts Group): a good size-quality tradeoff for everyday use.
- **PNG** (Portable Network Graphics): lossless compression, higher quality but bigger size than JPG. This is better suited for printing.
- **BMP** (Bitmap): no compression, same quality but bigger size than PNG.
- **TIF** (Tagged Image Format): lossless LZW compression, similar size to PNG, suitable for print.
- **GIF** (Graphics Interchange Format): lossless compression, but only 256 colors maximum.

Transparent Background

Specifies the type of background to use for the pictures saved to disk with the Save picture command:

- Unchecked: the picture uses the current background.
- Checked: the picture background is transparent. This is convenient if you wish to overlay your planogram picture on your choice of background in another document.

Note: This option is available only with the PNG and TIF file formats.

Note: Pictures copied to the clipboard with the Copy picture command cannot have a transparent background.

Default folder

Optionally specifies where images will be saved by default: use the **Browse** button to select the folder on your PC. You can also type the folder path directly in the text box below.
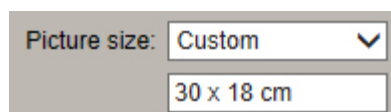
Orientation

Lets you choose if the image should be in portrait (vertical) or landscape (horizontal) format.

Picture size

Provides a list of predefined values defining the dimensions of the images to save. This list includes common formats in pixels or in printed size.

If you don't find a suitable preset value, you can choose *Custom* in the list and set your own width and height values in the box below. Enter values as follows: [width] × [height] [unit (cm / mm / in / px)]. If no unit type is entered, it defaults to the current measurement unit set in Settings.

You can specify any values up to 8000 × 6000 pixels (a monster 48 M pixels image) or even more if your system has enough memory. Typical use for very high resolution images includes booklets with prepress quality or big size posters that you can use on a tradeshow booth back wall.

When you change the picture size and orientation, the viewing area is automatically resized to match the aspect ratio of your final picture. This comes handy to fine tune the aspect (using the **Orbit, Pan** and **Zoom** tools) before taking a picture with a perfectly predictable result.

Resolution

Sets the number of pixels per inch (PPI) in the image. You can use presets or a custom value.

- If you have set the image size in cm, in or mm, the PPI determines how many pixels will contain the image. Ex: a width of 10 in × 200 PPI = 2000 pixels in the image width.

- If you have set your image size in px, the PPI determines the printed size. Ex: a width of 1500 px / 300PPI = 5 inches (12.7 cm) wide for the image.

Note: Your picture parameters are saved for your next session.

Note: If you have turned on Dimension Lines onscreen, your output pictures also include dimensions of bays and selected room elements as previewed in the *Publish* task viewing area. The size of the dimension text and arrows is adjusted automatically to result in a text height of 3mm in your printed picture, based on current *Picture size* and *Resolution* values.

Reports

You can publish detailed reports of your planograms. These reports typically include the list of *products* and optionally *accessories* in your current planogram project as well as predefined picture(s) of the planogram.

Reports are well suited for printing and transmitting your planogramming guidelines for implementation.
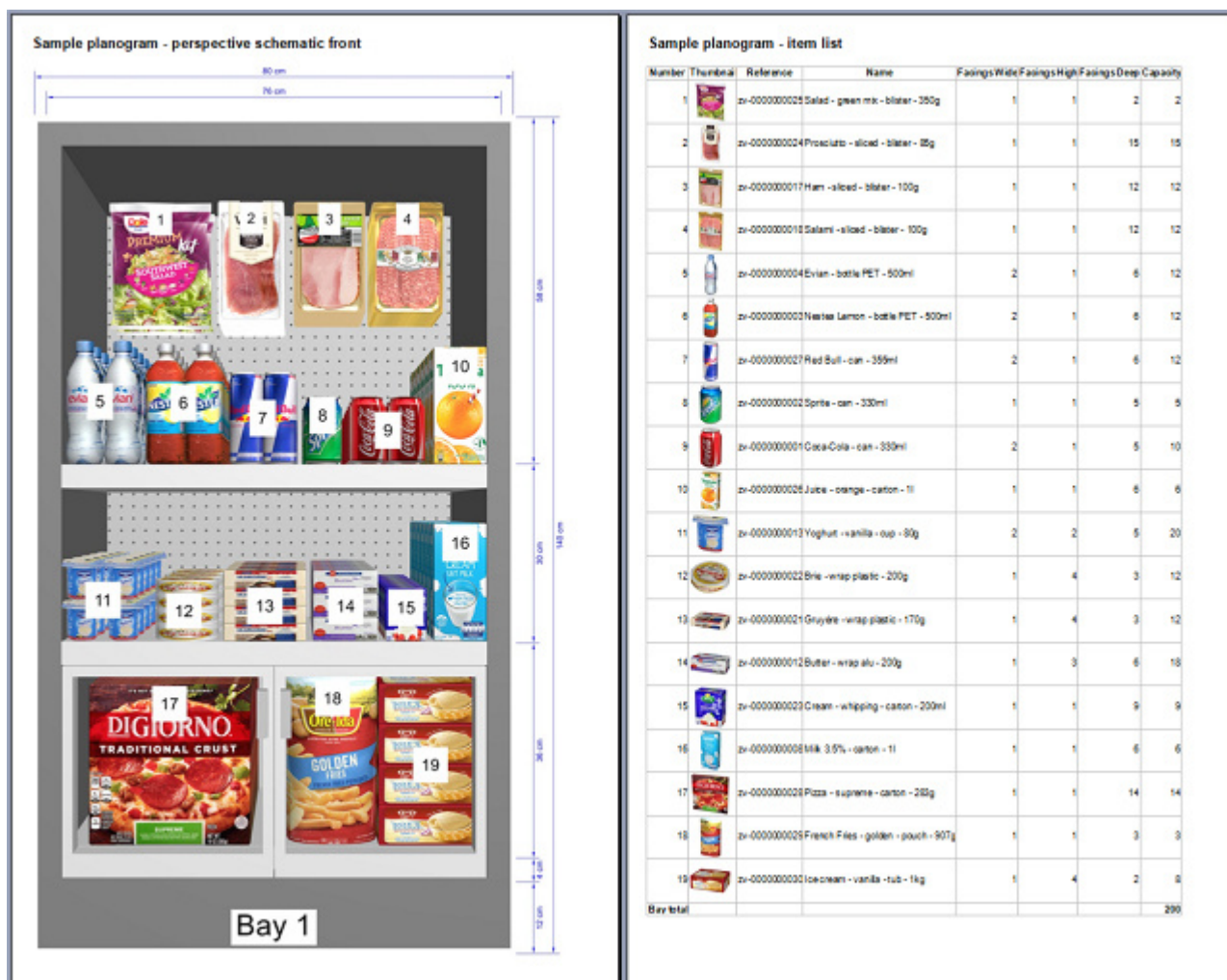
Example of an HTML report opened in Microsoft ® Word

Report command
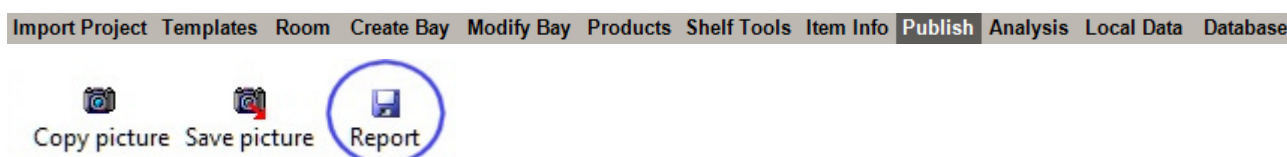
To generate a report:

1. Click on the **Report** button
2. Select a destination folder
3. Type a filename to save the report file(s)

There are several options to personalize your reports. All the options below are saved by the application for the next time you use PlanogramBuilder.

Report parameters

Several options can be set to personalize your reports.

File Output

File Format

provides a choice of file formats to save the reports. Reports can be saved in the following formats:

- **HTML** (Hypertext Markup Language) file with separate image files in jpeg format (planogram pictures and item thumbnails). Choose this format to:
    - o Publish the report and images "as is" directly on an Intranet or Internet web site.
    - o Open in Microsoft ® Word for further editing and printing. Once opened in Word, you can also save as PDF, DOC or DOCX documents, which regroups the otherwise separate listing and images of the report in one single file.
- **XLS** and **XLXS** (Microsoft ® Excel workbooks). Choose these formats to:
    - o Open and edit the planogram product listing in a spreadsheet application.

    Note: When printing the report from Excel, if the list is too wide to fit within the selected page size, additional pages are generated for the extra columns.

    Note: Planogram pictures and item thumbnails are embedded in *Excel* files.

    Note: Un these formats, any group that is shown in collapsed state in the Project Item List is also collapsed in the Excel report list. It can be expanded if desired in Excel.
- **PDF** (Portable Document Format). Choose this format to:
    - o Obtain the report and images in a format ready to print or send to others.

Do not choose this format if you want to further edit the report layout or content.

Note: In the PDF format, each bay (images & product listing) is grouped on one page when possible. If the listing columns are too wide for the selected page size, additional pages are generated for the extra columns.

Note: Planogram pictures and item thumbnails are embedded in *PDF* files.

Create a folder

Check this checkbox if you wish to have a new file folder automatically created when you save a report. The folder will be created within the folder selected in the Save dialog box and will be named with the same name as the report name.

Formatting
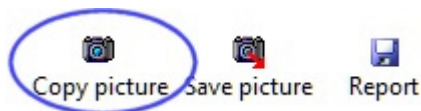
Import Project Templates Room Create Bay Modify Bay Products Shelf Tools Item Info Publish Analysis Local Data Database

The settings below propose various options to customize the layout of your reports.

Page size: several standard paper sizes are provided in the drop-down list. You can also select "Custom" and type-in specific dimensions.

Note: Dimensions are displayed using your preferred measurement unit as set in Measurement unit.

Notes:

- Page size for PDF format is well supported.

- When you open an HTML report in a web browser, the page size doesn't have any effect when just viewing the report. Page size is only used to determine page layout for printing the reports from web browsers or when opening in paper-based applications like Microsoft ® Word.

- The page size for HTML and Excel formats are not recognized by all web browsers and applications, as shown in the table below:

	Microsoft ® Word	Microsoft ® Excel	Microsoft ® Edge	Google Chrome	Mozilla Firefox
Page size support	Yes	No	Yes	Yes	No

In case page size is not supported, you must set the page layout manually in your application when you want to print a report, from Excel for example.

Left, Right, Top, Bottom margin: sets the respective page margin in reports.

Font: lets you select the font (Arial, Verdana, etc.) and the point size of the text for product listings in reports. The smaller the font, the more columns you can fit on a page.

Text Color: lets you specify the color of text for product listings in reports.

Background color: sets the color of the page background for reports.

Border color: lets you choose the color of borders for the tables containing product listings.

Resolution: this parameter defines the resolution in pixels per inch for all images in a report. Several preset choices are available and you can also enter a custom value. The higher the setting, the more detailed your images will be when you zoom in or when you print them. The tradeoff of a higher resolution is a larger file size.

Report Pictures

You can include images of your planogram project in your reports. These images are different from the ones published with single pictures: report pictures are taken from predefined viewpoints and are automatically cropped and zoomed to fit your planogram nicely in the report.

The following checkboxes let you choose which pictures to include in your reports.

Project

This picture displays all the elements in your planogram using the current display mode (realistic or schematic; perspective or orthographic).

The project report picture appears just after the report title, before any other image and report list.

You can choose two different viewpoints:

- **Front**:
    - o   With Free Bays (Bay Placement Mode) **OFF**, the planogram project is shown from the front and is framed to fit on the page.
    - o   With Free Bays (Bay Placement Mode) **ON**, the planogram project is shown from the same viewing angle as the live view and is framed to fit on the page.
- **Top**: The planogram project is viewed from the top.
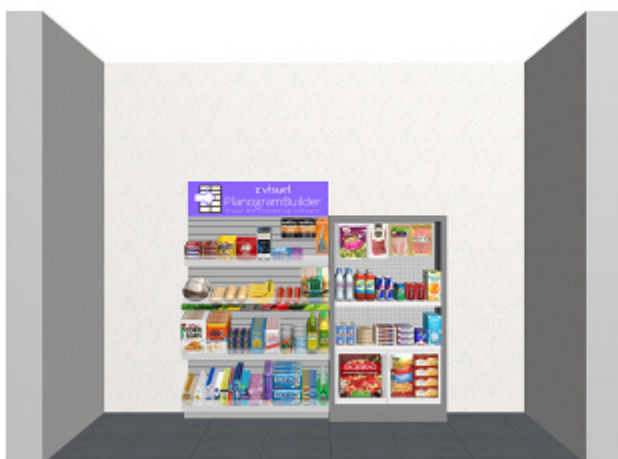
Project view - Front (Free Bays OFF)   *Project view - Front (free Bays ON)*

Project view – Top

Bay(s) orthographic view

A view of each individual bay with no perspective effect is included in the report.

You can choose two different viewpoints:

- **Front**: the planogram project is viewed from the front.
- **Top**: The planogram project is viewed from the top.

Note: If you have grouped items by Bay name or Bay number, bay pictures appear in the report above their respective bay item list. In all other cases, bay images appear above the project item list.

Bay orthographic – Front view

Bay(s) perspective view

A picture of each bay with a perspective effect is included in the report.

You can choose two different viewpoints:

- **Front**: the planogram project is viewed from the front.
- **Top**: The planogram project is viewed from the top.

Note: If you have grouped items by Bay name or Bay number, bay pictures appear in the report above their respective bay item list. In all other cases, bay images appear above the project item list.

Bay perspective – Front view

Bay(s) orthographic schematic view

A schematic view of each bay with no perspective effect is included in the report. PlanogramBuilder uses the current values set in the settings for Schematic View to determine the schematic view style (Product style, Product label, etc.).

Tip: To easily find each product in the report listing, set your schematic view to display *Position* labels on the products (see Schematic View Settings) and also include the *Position* column in the report listing (see Report List).

You can choose two different viewpoints:

- **Front**: the planogram project is viewed from the front.
- **Top**: The planogram project is viewed from the top.

Note: If you have grouped items by Bay name or Bay number, bay pictures appear in the report above their respective bay item list. In all other cases, bay images appear above the project item list.
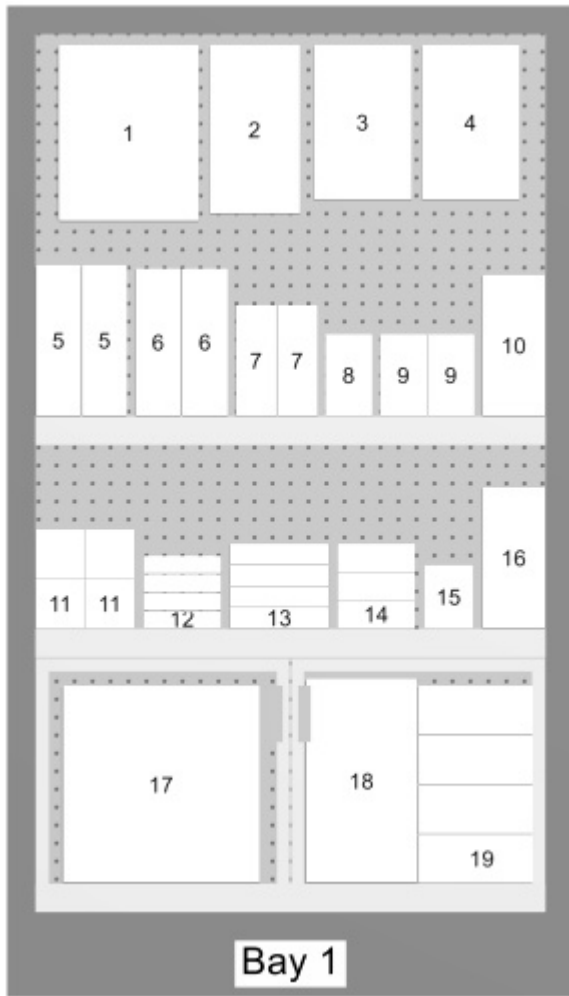
Bay orthographic schematic – Front

Bay(s) perspective schematic view

A schematic view of each bay with a perspective effect is included in the report. PlanogramBuilder uses the current values set in settings for the Schematic View to determine the schematic style (Product style, Product labels, etc.). For example, to help you identify products on the report view, you can display position labels on the products corresponding to the report listing numbering.

You can choose two different viewpoints:

- **Front**: the planogram project is viewed from the front.
- **Top**: The planogram project is viewed from the top.

Note: If you have grouped items by Bay name or Bay number, bay pictures appear in the report above their respective bay item list. In all other cases, bay images appear above the project item list.
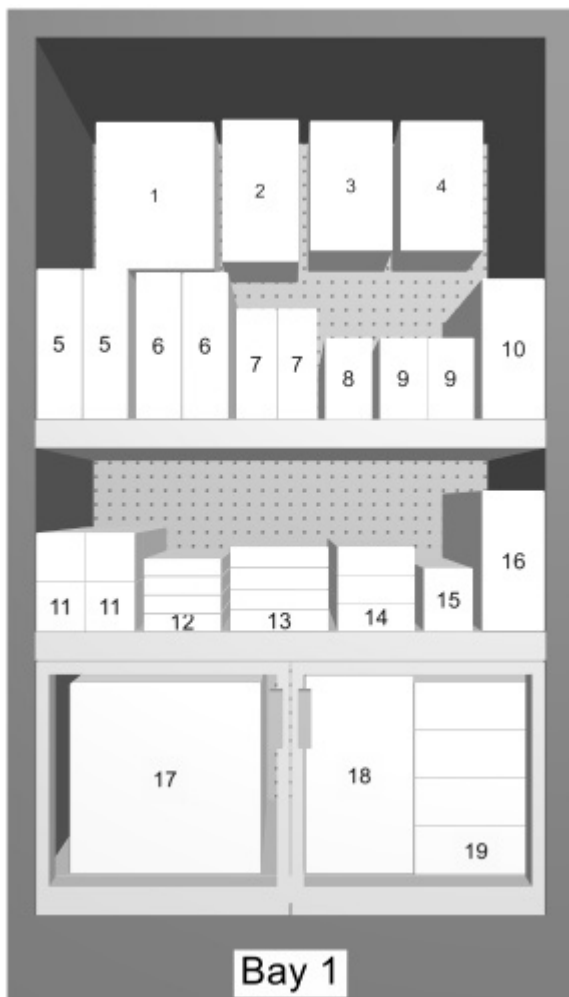
Bay perspective schematic - Front

Notes on Report pictures:

When you output report pictures, the visibility of the following elements depends on your current display modes (see Display Modes and Options):

- **Dimensions**
- **Edges**
- **Peg Hooks**
- **Flow Direction**
- **Room**

If dimensions are turned ON, the dimensions shown in the report pictures vary depending on the type of pictures:

- **Project** pictures include the dimensions of each bay cluster (each isolated bay and each group of adjacent bays). Dimensions of room elements are also shown, but only for room elements which are selected in the viewing area. The *width*, *height* and *depth* are displayed depending on the viewing angle and the available space for dimensioning. You can adjust the view with *Orbit*, *Zoom* and *Pan* to display the desired dimensions.

- **Bay** pictures (*Bay perspective, Bay orthographic* and *Bay schematic* pictures) include bay dimensions, plus vertical shelf measures and lateral distances between dividers.

- **Front views** only show *width* and *height*.

- **Top views** only show *width* and *depth*.

- ***Note***: The size of the dimension text and arrows is adjusted automatically to result in a text height of 3mm in your printed report images, based on the report *Page size* and *Resolution* values. This does not correspond to the onscreen dimension text size in the viewing area.

Report List

| Import Project | Templates | Room | Create Bay | Modify Bay | Products | Shelf Tools | Item Info | Publish | Analysis | Local Data | Database |

Reports also contain the list of all the products used in a project.

The report list content and parameters reflect what is displayed in the Project Item List.

Make sure to configure the Project Item List to obtain the desired layout and content in your reports. We advise saving preset list configurations for different needs.

Notes on groups in report lists:

- If your *Project item list* is not grouped by any property, the report contains a single list with all items.

- If your *Project item list* is grouped by *Bay name* or *Bay number*, the report contains a separate list for each bay in the report.

- If your *Project item list* is grouped by any other property (ex: *category*), the report contains a single list with all items. Additional rows of a different color are included for each group name.

Position	Bay - Shelf	Reference	Name	Category	Facings Wide	Facings High
Beverage						
5	1-2	zv-0000000004	Evian - bottle PET - 500ml	Beverage	2	1
6	1-2	zv-0000000003	Nestea Lemon - bottle PET - 500ml	Beverage	2	1
7	1-2	zv-0000000027	Red Bull - can - 355ml	Beverage	2	1
8	1-2	zv-0000000002	Sprite - can - 330ml	Beverage	1	1
9	1-2	zv-0000000001	Coca-Cola - can - 330ml	Beverage	2	1
10	1-2	zv-0000000026	Juice - orange - carton - 1l	Beverage	1	1
					10	**6**
Dairy						
11	1-3	zv-0000000013	Yoghurt - vanilla - cup - 80g	Dairy	2	2
12	1-3	zv-0000000022	Brie - wrap plastic - 200g	Dairy	1	4
13	1-3	zv-0000000021	Gruyère - wrap plastic - 170g	Dairy	1	4
14	1-3	zv-0000000012	Butter - wrap alu - 200g	Dairy	1	3
15	1-3	zv-0000000023	Cream - whipping - carton - 200ml	Dairy	1	1
16	1-3	zv-0000000008	Milk 3.5% - carton - 1l	Dairy	1	1
					7	**15**
Frozen Food						
17	1-4	zv-0000000028	Pizza - supreme - carton - 283g	Frozen Food	1	1
18	1-4	zv-0000000029	French Fries - golden - pouch - 907g	Frozen Food	1	1
19	1-4	zv-0000000030	Ice cream - vanilla - tub - 1kg	Frozen Food	1	4
					3	**6**
Meat						
2	1-1	zv-0000000024	Prosciutto - sliced - blister - 85g	Meat	1	1
3	1-1	zv-0000000017	Ham - sliced - blister - 100g	Meat	1	1
4	1-1	zv-0000000018	Salami - sliced - blister - 100g	Meat	1	1
					3	**3**
Produce						
1	1-1	zv-0000000025	Salad - green mix - blister - 350g	Produce	1	1
					1	**1**
					24	**31**

Example of a report list

Analysis

The *Analysis* task regroups tools to help you choose the best assortment (Assortment Analysis) and verify the performance of your Planograms (Project Analysis).

Analysis Options

Here is the list of options applying to all Analysis tools:

Currency symbol

Options

Currency symbol: $

You can optionally enter a currency symbol in this field so that your statistics appear with the desired symbol in PlanogramBuilder.

This symbol is used by both the Project Analysis and the Assortment Analysis tools.

Project Analysis

Analysis > Project Analysis

The goal of the *Project Analysis* is to display in real-time (i.e. updated continuously when building a planogram) various metrics based on your product properties, your facings arrangement and real-world market data such as pricing and past sales.

This enables you to check your planogram measured and projected performance as a whole and per product.
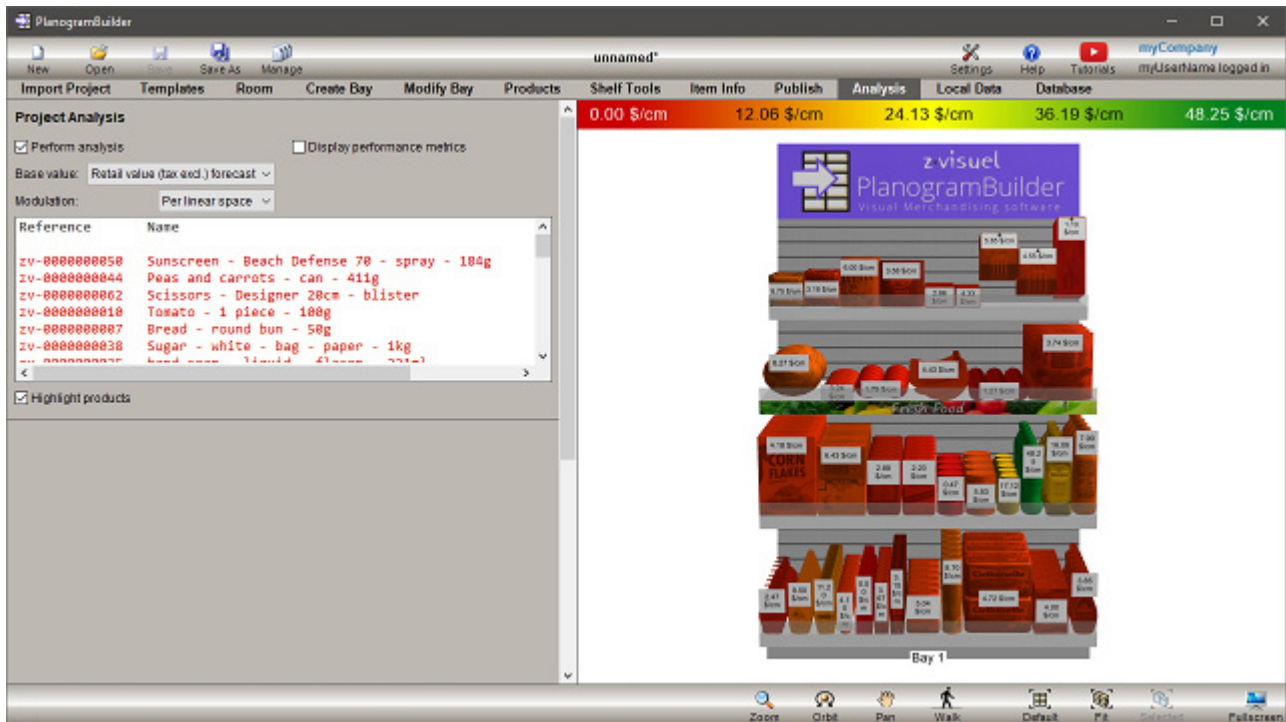
Project Analysis Workflow

Here is a typical workflow to analyse your current project:

1. Define the desired Project Analysis Parameters.
2. Perform the Analysis.
3. See the complete analysis results in the Project Analysis Log.
4. Optionally display the analysis results as a summary, as colored highlights and as values on products.

Project Analysis Parameters

The project analysis can be performed on several criteria and metrics which are described below.

Base value

This drop-down list lets you choose the main criteria to perform the project analysis.

Base value: Retail value (tax excl.) forecast

- Front surface
- Linear space
- Markup forecast
- Markup on shelf
- Markup percent
- Profit margin
- Quantity sold
- Retail price (tax excl.)
- Retail price (tax incl.)
- Retail value (tax excl.) forecast
- Retail value (tax excl.) on shelf
- Retail value (tax incl.) forecast
- Retail value (tax incl.) on shelf
- Sales tax rate
- Single item markup
- Volume used
- Wholesale price
- Wholesale value forecast
- Wholesale value on shelf

The available choices in the list depend on your loaded Price List File and Sales Figures File.

Front surface

The front area used by product, expressed in the selected Measurement unit.

	Width used
×	Height used
=	Front surface

Note: these values are based on the space taken by facings blocks including the gaps between facings if any. For example, a product measuring 10cm wide × 8cm high placed as 2 facings wide × 2 facings high, with a width gap of 1cm results in this front surface:

$$((10cm × 2 + 1cm) × (8cm × 2)) = 336cm^2$$

Linear space

The width used by product, expressed in the selected Measurement unit.

For on shelf products (standard): linear space = facings block(s) width. (in the case of shelved products with multiple facings high, each row uses the same shelf and back panel slot, so we must count only the base row of the stack as using linear space)

	Width used
=	Linear space

For pegged products: linear space = facings block(s) width × facings high. (in the case of pegged products with multiple facings high, each row uses a separate backpanel slot, so we must count each row as using linear space)

	Width used
×	Facings high
=	Linear space

Note: these values are based on the space taken by each facings block including the width gaps between facings if any. For example, a product with a width of 10cm placed as 2 facings wide and a width gap of 1cm results in this linear space:

((10cm × 2) + 1cm) = 21cm

Markup forecast

The markup value by product, based on the quantity sold.

	Markup (Retail price (tax excl.) - Wholesale price)
×	Quantity sold
=	Markup forecast

Note: requires Price List File and Sales Figures File

Markup on shelf

The markup value by product, based on the number of facings (capacity).

	Markup (Retail price (tax excl.) - Wholesale price)
×	Number of facings (W×D×H)
=	Markup forecast

Note: requires Price List File

Markup percent

The markup percentage by product.

	Markup (Retail price (tax excl.) - Wholesale price)
/	wholesale price
=	Markup percent

Note: requires Price List File

Profit margin

The profit percentage by product.

	Markup (Retail price (tax excl.) - Wholesale price)
/	Retail price (tax excl.)
=	Markup percent

Note: requires Price List File

Quantity sold

The number of units sold by product as listed in your sales figures file.

Note: requires Sales Figures File

Retail price (tax excl.)

The selling price before tax by product.

Note: requires Price List File

Retail price (tax incl.)

The selling price with tax by product.

Note: requires Price List File

Retail value (tax excl.) forecast

The selling value before tax by product, based on the quantity sold.

	Retail price (tax excl.)
×	Quantity sold
=	Retail value (tax excl.) forecast

Note: requires Price List File and Sales Figures File

Retail value (tax excl.) on shelf

The selling value before tax by product, based on the number of facings (capacity).

	Retail price (tax excl.)
×	Number of facings (W×D×H)
=	Retail value (tax excl.) on shelf

Note: requires Price List File

Retail value (tax incl.) forecast

The selling value with tax by product, based on the quantity sold.

	Retail price (tax incl.)
×	Quantity sold
=	Retail value (tax incl.) forecast

Note: requires Price List File and Sales Figures File

Retail value (tax incl.) on shelf

The selling value with tax by product, based on the number of facings (capacity).

	Retail price (tax incl.)
×	Number of facings (W×D×H)
=	Retail value (tax incl.) on shelf

Note: requires Price List File

Sales tax rate

The sales tax by product.

Note: requires Price List File

Single item markup

The difference between buying and selling price before tax.

	Retail price (tax excl.)
-	Wholesale price
=	Single item markup

Volume used

The volume used by product, expressed in the selected Measurement unit.

Note: these values are based on the space taken by each facings block including the gaps between facings if any. For example, a product measuring 10cm wide × 8cm deep × 5cm high, placed as 2 facings wide × 3 facings deep × 2 facings high, with a depth gap of 1cm results in this volume:

$$((10cm \times 2) \times (8cm \times 3 + 1cm \times 2) \times (5cm \times 2)) = 5200cm^3$$

	Width used
×	Depth used
×	Height used
=	Volume used

Wholesale price

The buying price by product.

Note: requires Price List File

Wholesale value forecast

The buying value by product, based on the quantity sold in your sales figures.

	Wholesale price
×	Quantity sold
=	Wholesale value forecast

Note: requires Price List File and Sales Figures File

Wholesale value on shelf

The buying value by product, based on the number of facings (capacity).

|	Wholesale price
×	Number of facings (W×D×H)
=	Wholesale value on shelf

Note: requires Price List File

Modulation

Import Project Templates Room Create Bay Modify Bay Products Shelf Tools Item Info Publish **Analysis** Local Data Database

Depending on the selected Base value, you can modulate the analysis result to take into account the number of facings or the space used by the products in your current project.

This is useful for example to perform space versus sales analysis.

Modulation: None
  None
  Per front facing
  Per front surface
  Per linear space
  Per volume used

None

Shows the direct results of the analysis selected in Base value.

Per front facing

Divides the results of the Base value analysis by the number of front facings of the product.

	Base value result
/	Number of front facings (W×H)
=	Per front facing result

Per front surface

Divides the results of the Base value analysis by the front surface used by the product, expressed in the selected Measurement unit, squared.

	Base value result
/	Front surface used
=	Per front surface result

Note: front surface includes the space taken by width and height gaps between facings if any.

Per linear space

Divides the results of the analysis by the linear space used by the product, expressed in the selected Measurement unit.

	Base value result
/	Linear space used
=	Per linear space result

Note: linear space includes the space taken by width gaps between facings if any.

Per volume used

Divides the results of the analysis by the volume used by the product, expressed in the selected Measurement unit, cubed.

	Base value result
/	Volume used
=	Per volume used result

Note: volume used includes the space taken by all gaps between facings if any.

Project Analysis Tools

Import Project Templates Room Create Bay Modify Bay Products Shelf Tools Item Info Publish **Analysis** Local Data Database

Perform Analysis

Import Project Templates Room Create Bay Modify Bay Products Shelf Tools Item Info Publish **Analysis** Local Data Database

Click on this checkbox to perform the analysis and display the results in the text area below.

The results are based on the Project Analysis Parameters.

***Important Note*:**

The analysis is performed for each product reference found in the current project.

If a given product reference is found in several facings blocks, the analysis result for this product combines all its facings blocks.

Show performance summary

Click on this checkbox to show a summary of key figures of your planogram project performance. Whenever this option is checked a special window (as shown below) is displayed above the viewing area. *Note*: just uncheck it to hide the display of performance data.

Note: Perform analysis must also be checked in order to display performance summary.

	Wholesale value	Retail value (tax excl.)	Retail value (tax incl.)	Markup	Markup percent	Profit margin
Sales forecast:	2738.67 $	3542.09 $	4215.08 $	803.42 $	29.34%	22.68%
On shelf value:	1318.34 $	1667.45 $	1984.26 $	349.10 $	26.48%	20.94%

Notes:

Undefined metrics are displayed with the ***N/A*** value.

Metrics based on incomplete data have the ***(MD)*** (missing data) value appended to the calculated value.

Unavailable metrics are shown with a grayed-out disabled look (ex: missing columns in local data files)

Sales forecast

This row shows a summary of key totals for all product references found in your project, based on sales figures.

Wholesale value

The total Wholesale value forecast.

Retail value (tax excl.)

The total Retail value (tax excl.) forecast.

Retail value (tax incl.)

The total Retail value (tax incl.) forecast.

Markup

The total Markup forecast.

Markup percent

The ratio between total *markup* and *wholesale value* forecasts described above, expressed in percentage.

	Markup
/	Wholesale value
=	Markup %

Profit margin

The ratio between total *markup* and *retail value (tax excl.)* forecasts described above, expressed in percentage.

	Markup
/	Retail value (tax excl.)
=	Profit margin

On shelf value

This row shows a summary of key totals for all product references found in your project, based on the number of facings (capacity).

Wholesale value

The total Wholesale value on shelf.

Retail value (tax excl.)

The total Retail value (tax excl.) on shelf.

Retail value (tax incl.)

The total Retail value (tax incl.) on shelf.

Markup

The total Markup on shelf.

Markup percent

The ratio between total *markup* and *wholesale value* on shelf described above, expressed in percentage.

	Markup
/	Wholesale value
=	Markup %

Profit margin

The ratio between total *markup* and *retail value (tax excl.)* on shelf described above, expressed in percentage.

	Markup
/	Retail value (tax excl.)
=	Profit margin

Highlight products

Import Project Templates Room Create Bay Modify Bay Products Shelf Tools Item Info Publish **Analysis** Local Data Database

You can display the results of the Project Analysis as colored highlights on the products in your current Planogram and in the Project Item List:

1. Display the Project Item List.
2. Display the Project Item List Content choice panel.
3. Highlight the Project Analysis value. See Highlighting.
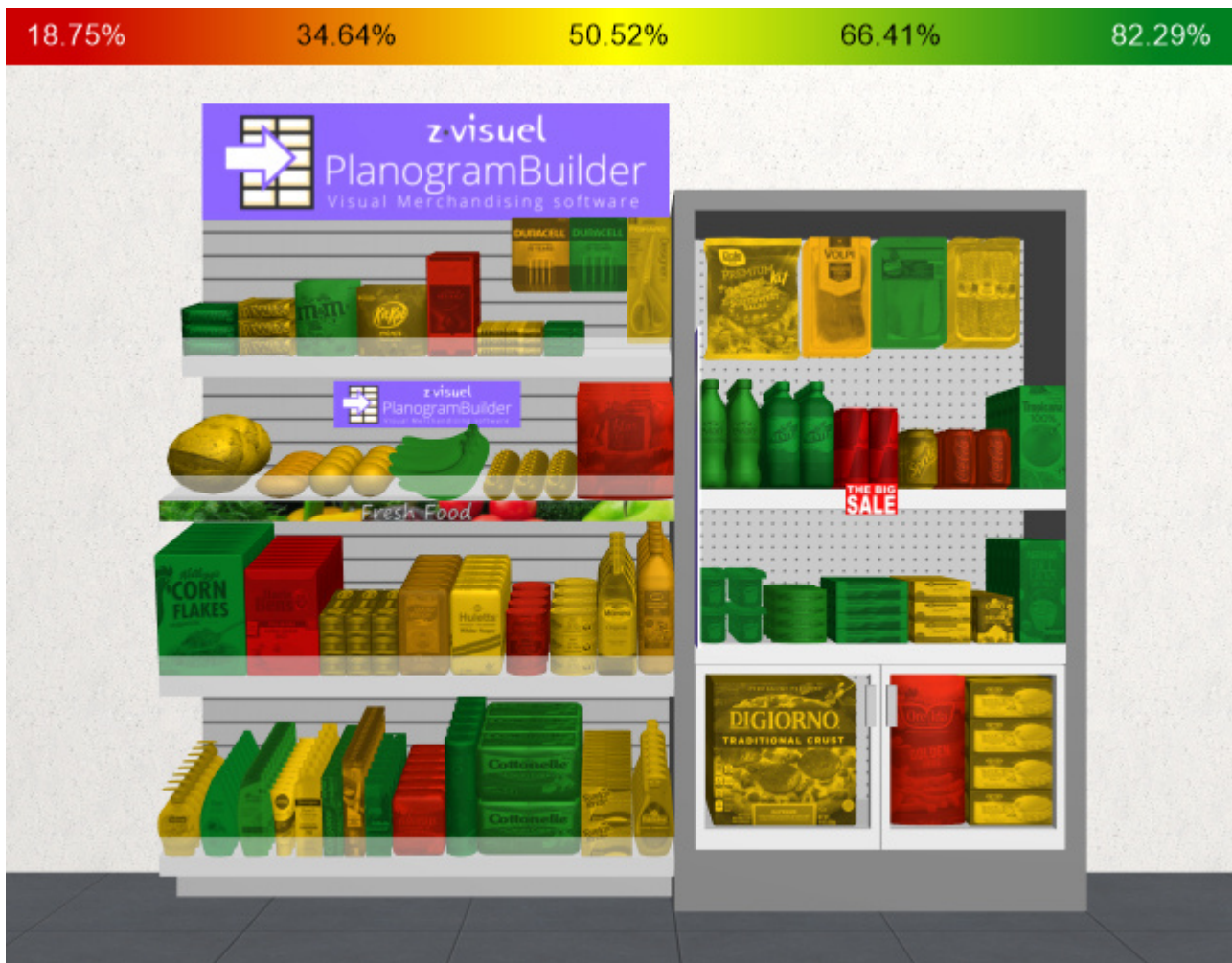
Example of Project Analysis values shown as color highlights

Display Analysis Value on Products

In schematic view, you can also show the **Project analysis value** on products or as product labels. See Schematic View for details on turning this feature ON.

Note: Perform analysis must also be checked in order to display analysis results on product labels.

Notes:

Undefined metrics are displayed with the **N/A** value.

Metrics based on incomplete data have the **(MD)** (missing data) value appended to the calculated value.

Tip: You can also combine Highlight products and Schematic View with the analysis values to get a clear picture of your project analysis results, as shown in the examples below:
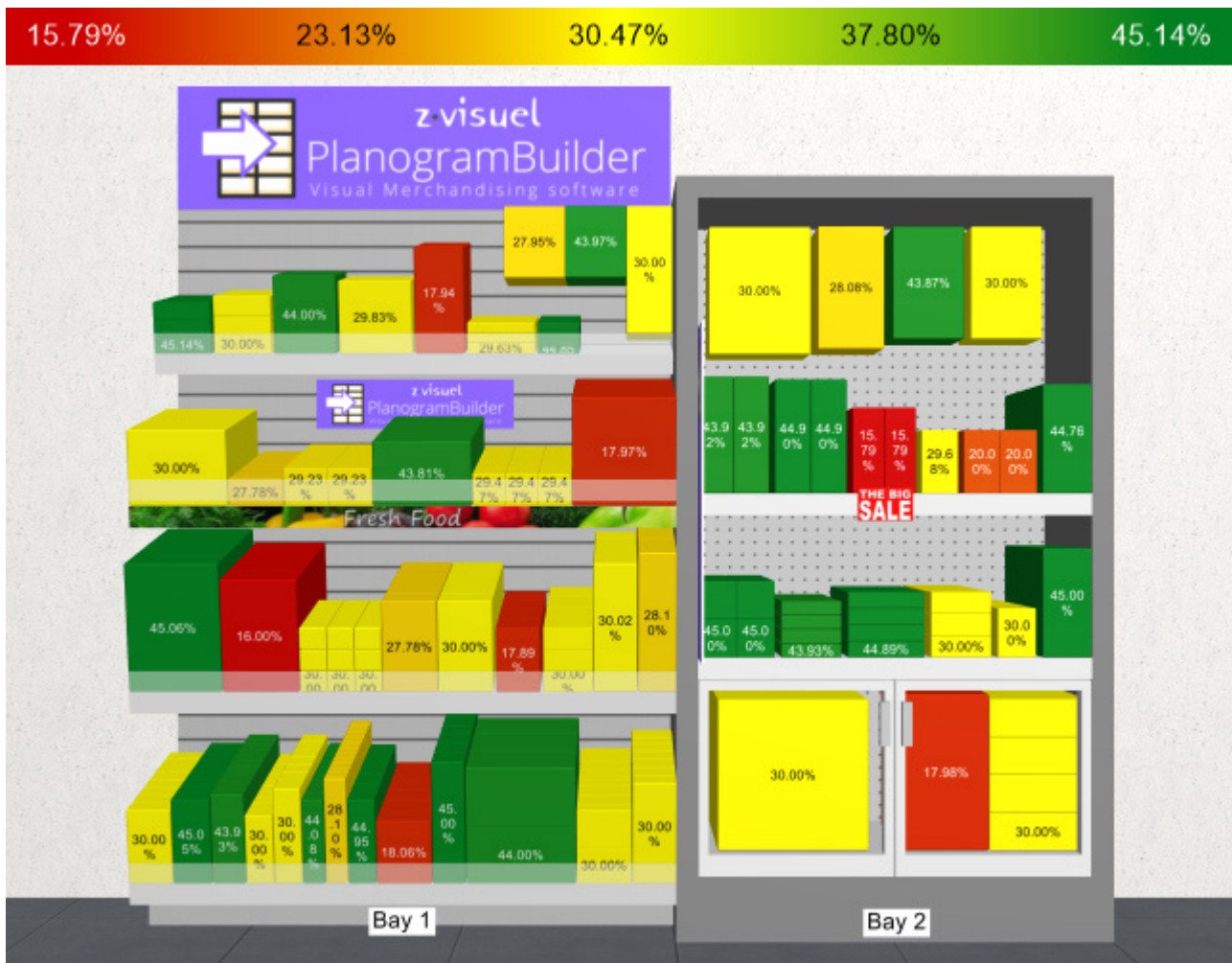
Project Analysis Log

Import Project   Templates   Room   Create Bay   Modify Bay   Products   Shelf Tools   Item Info   Publish   **Analysis**   Local Data   Database

After clicking on Perform analysis, the results of the analysis are shown in the log area, listing one product per line with its value. The total and average value for your project is also displayed on the last line when applicable.

The text color of each line represents the product value on a graded scale, corresponding to the colors used to highlight products.

Reference	Name	Value [%]
zv-0000000027	Red Bull - can - 355ml	15.79
zv-0000000001	Coca-Cola - can - 330ml	20.00
zv-0000000002	Sprite - can - 330ml	29.68
zv-0000000004	Evian - bottle PET - 500ml	43.92
zv-0000000026	Juice - orange - carton - 1l	44.76
zv-0000000003	Nestea Lemon - bottle PET - 500ml	44.90
	Average	33.17

Tip: you can zoom in/out in the log window using *Ctrl + mouse wheel*. The default zoom level is reset on task switch.

Note:

Undefined metrics are displayed with the **N/A** value.

Metrics based on incomplete data have the **(MD)** (missing data) value appended to the calculated value.

Log context menu

Right-click in the log area to see its context menu.

The following tools and options are available:

Columns lets you choose the columns to display in the log:

- Reference
- Name
- Value

Copy lets you copy selected text from the log (*Ctrl + c*).

Select All selects all the text in the log (*Ctrl + a*).

Tip: To preserve the text colors and format when you paste the analysis results in another application, choose the paste method labeled *Rich Text Format, formatted text RTF or Keep format*.

Assortment Analysis

Analysis > Assortment Analysis

The Assortment Analysis lets you define a subset of the products in your database.

You can then optionally rank and filter this subset by sales and by classification to optimize your planogram assortment, with the performance of each product displayed in the analysis log. The product catalog can also be sorted and filtered by the analysis results.

One of the typical use cases is to use the Pareto principle to identify the products with the most value.

Assortment Analysis

Assortment file:

[   ] [✕] [Browse...]

```
The following columns can be imported (* = compulsory):
 - Reference *

1: Imported column(s):
 - Reference
1: Ignored column(s):
```

Performance criterion:	Retail value (tax excl.) ▾
Inclusion threshold:	80.00%

☑ Restrict to catalog filters

Reference	Rank	Value [$]	Percent [%]	Value [$]	Percent [%]
zv-0000000037	1	189.00	29.43	189.00	29.43
zv-0000000047	2	156.80	24.41	345.80	53.84
zv-0000000036	3	104.50	16.27	450.30	70.11
zv-0000000034	4	72.00	11.21	522.30	81.32
zv-0000000031	5	23.75	3.70	546.05	85.02
zv-0000000048	6	20.50	3.19	566.55	88.21
zv-0000000035	7	19.80	3.08	586.35	91.30

Assortment Analysis Workflow

Here is a typical workflow to perform an assortment analysis:

1. Define and load the desired list of products to analyze (Assortment File).

---

2. Set the Assortment Analysis Parameters. Depending on the selected analysis criterion, you may also need a Price List and a Sales Figures file.

3. See the complete analysis results in the Assortment Analysis Log.

4. Optionally rank and filter the Product catalog based on the analysis results.

Assortment File

| Import Project | Templates | Room | Create Bay | Modify Bay | Products | Shelf Tools | Item Info | Publish | Analysis | Local Data | Database |

The assortment file is an Excel file defining the list of products you want to analyze.

It can contain all the products in your database or only a subset of your database.

Product references not found in your database and disabled products (see Database Item Properties) are disregarded by the analysis.

Important note:

The analysis is performed as soon as a valid file is loaded.

File selection

| Import Project | Templates | Room | Create Bay | Modify Bay | Products | Shelf Tools | Item Info | Publish | Analysis | Local Data | Database |

File text box: this shows the path and name of the currently loaded assortment file.

Clear: click on this button to clear the current file from the text box.

Browse: click on this button to select your assortment file on your PC.

Note: the file path persists over PlanogramBuilder sessions.

Note: PlanogramBuilder provides an automatic reload of the local data files. This is useful since can keep the Excel application opened to edit your local data, save changes in Excel with Ctrl-S and enjoy immediate feedback in PlanogramBuilder.

Import Log

| Import Project | Templates | Room | Create Bay | Modify Bay | Products | Shelf Tools | Item Info | Publish | Analysis | Local Data | Database |

This area shows the following information:

- In **blue** text, to help you prepare your input spreadsheet: list of supported columns

- In **black** text, once you've imported a file: list of imported and ignored columns.

- In **red** text, once you've imported a file: list of errors

Tip: you can select and copy text from the import log.

Tip: you can zoom in/out in the log window using *Ctrl + mouse wheel*. The default zoom level is reset on task switch.
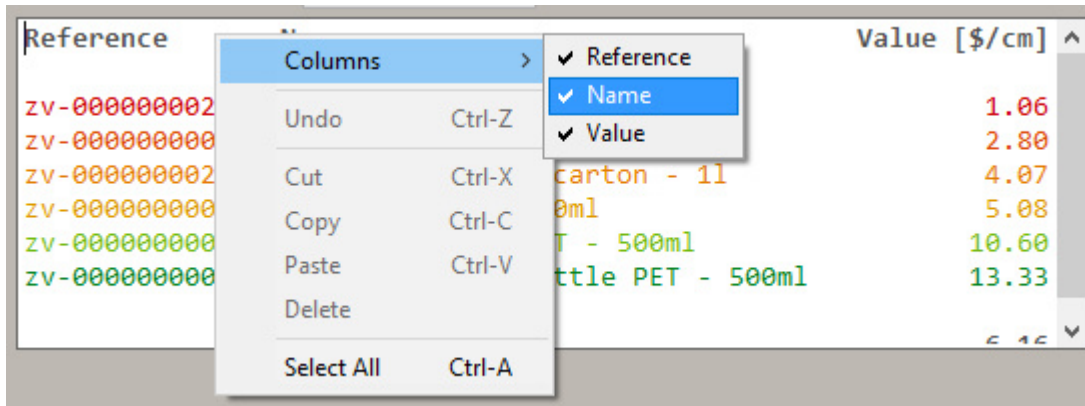
Example

| Import Project | Templates | Room | Create Bay | Modify Bay | Products | Shelf Tools | Item Info | Publish | Analysis | Local Data | Database |

To get an example of a valid assortment file, you can download the following file listing the products in all food categories of the sample products in PlanogramBuilder:
https://planogrambuilder.com/downloads/sample%20files/sample%20assortment%20file.xlsx

Assortment Analysis Parameters

Performance Criterion

This drop-down list lets you choose the criterion you wish to apply to rank the products:

Markup

This choice will sort the products by their markup value based on the quantity sold.

	Markup (Retail price (tax excl.) - Wholesale price)
×	Quantity sold
=	Markup

Note: requires Assortment File, Price List File and Sales Figures File

None

This choice lets you create a sub-assortment of your database based on your Assortment File but without any analysis. The products are listed alphabetically by reference in the Assortment Analysis Log.

Note: requires Assortment File

Tip: To work on a subset your database in the product catalog, use this method combined with Rank and Filter the Product Catalog.

Quantity sold

This choice will sort the products by quantity of items sold, not taking into account the monetary value of each item. The product with the highest number of units sold will be ranked first and the lowest number of units sold will be ranked last.

Note: requires Assortment File and Sales Figures File

Retail value (tax excl.)

This will sort the products by the amount of money generated from sales before tax. The product with the highest sales revenue will be ranked first and the one with the lowest sales revenue will be last.

	Retail price (tax excl.)
×	Quantity sold
=	Retail value (tax excl.)

Note: requires Assortment File, Price List File and Sales Figures File

Retail value (tax incl.)

This will sort the products by the amount of money generated from sales including tax. The product with the highest sales revenue will be ranked first and the one with the lowest sales revenue will be last.

	Retail price (tax incl.)
×	Quantity sold
=	Retail value (tax incl.)

Note: requires Assortment File, Price List File and Sales Figures File

Inclusion threshold

This parameter lets you specify a percentage threshold defining which products are valuable enough to keep.

This type of analysis uses what is known as the Pareto principle to identify the *vital few* versus the *trivial many* products. Applied to sales, this principle states that the vast majority of your results are generated by a small percentage of products.

The **inclusion threshold** represents the cumulated percentage values you want to reach to decide which products are parts of the vital few. A ratio of 80/20 (80% inclusion threshold) is often used but you can enter any desired target value.

Ex: with an **80%** *inclusion threshold* and Retail value (tax excl.) as *performance criterion*, the analysis works as follows:

1. The products listed in your Assortment File are analyzed.

2. They are ranked according to their individual Retail value (tax excl.).

3. Starting with the highest ranking product, the individual product Retail value (tax excl.) are added until their sum reaches the 80% *inclusion threshold*. These products are judged above threshold by the analysis (the *vital few*).

4. The remaining products which cumulated Retail value (tax excl.) make up 20% or less of the total are judged below threshold by the analysis (the *trivial many*).

Here is an analysis result log for the above example with 11 products. In this example, 4 products (in green) are enough to reach at least 80% of the revenue. The remaining 7 products (in red) amount to less than 20% of the revenue

Reference	Name	Rank	Value [$]	Percent [%]	Cumulative Value [$]	Cumulative Percent [%]
zv-0000000037	Toilet paper - Cottonelle - wrap plastic	1	189.00	29.43	189.00	29.43
zv-0000000047	Shampoo - Classic clean - flacon - 400ml	2	156.80	24.41	345.80	53.84
zv-0000000036	Razor - Sensor 2 - pouch - 12 pieces	3	104.50	16.27	450.30	70.11
zv-0000000034	Sanitary napkins - box - 30 pieces	4	72.00	11.21	522.30	81.32
zv-0000000031	Body wash - avocado - flacon - 500g	5	23.75	3.70	546.05	85.02
zv-0000000048	Hand cream - Soothing care - tube - 75ml	6	20.50	3.19	566.55	88.21
zv-0000000035	hand soap - liquid - flacon - 221ml	7	19.80	3.08	586.35	91.30
zv-0000000032	Toothpaste - MaxFresh - tube - 170g	8	14.70	2.29	601.05	93.59
zv-0000000046	Make-up pads - bag - 80 pieces	9	14.40	2.24	615.45	95.83
zv-0000000050	Sunscreen - Beach Defense 70 - spray - 184g	10	14.20	2.21	629.65	98.04
zv-0000000049	Toothbrush - Pro-Flex soft - blister	11	12.60	1.96	642.25	100.00

Below is a typical Pareto graph illustrating the same example :
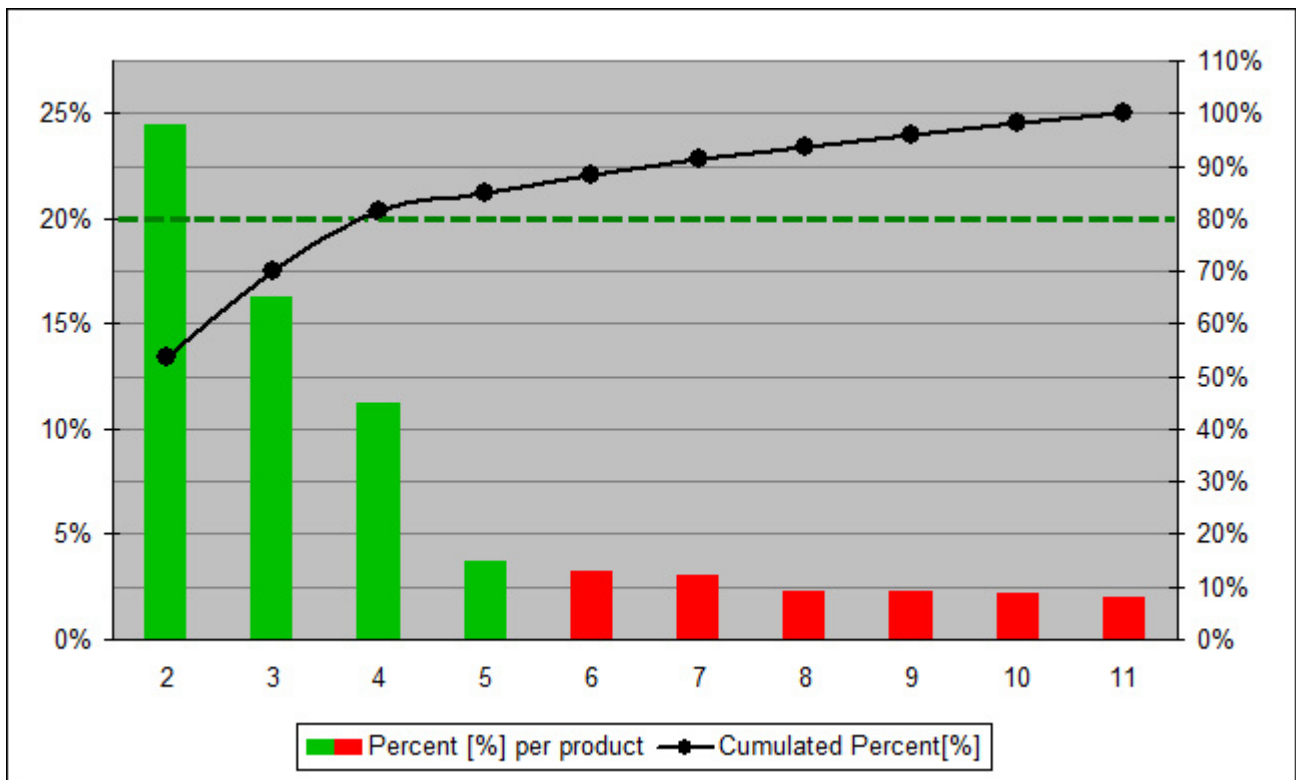
Restrict to Catalog Filters

Import Project | Templates | Room | Create Bay | Modify Bay | Products | Shelf Tools | Item Info | Publish | **Analysis** | Local Data | Database

- **Checked**: the analysis is done only on the products in your Assortment File that belong to the classification level currently selected in the Product Catalog. Products not in the current selected level are ignored by the analysis.

Tip: Use this method to analyze sales for any category, brand or other Item Classification Properties you have defined. For example, select any category in the product catalog and see right away how products rank just within this category.

- **Unchecked**: the analysis is done on all the products in your Assortment File.

In this case the assortment analysis results will be the same no matter what classification level is selected in the Product catalog.

Assortment Analysis Log

Import Project | Templates | Room | Create Bay | Modify Bay | Products | Shelf Tools | Item Info | Publish | **Analysis** | Local Data | Database

After loading the Assortment File, the results of the analysis are shown in the log area, listing one product per line.

- In **black** text with no result: ignored products (excluded by Restrict to Catalog Filters)
- In **red** text with no result: ignored products with missing values.
- In **green** text with results: products within the Inclusion threshold.
- In **dark red** text with results: products outside the Inclusion threshold.

```
zv-0000000044: Ignored product
zv-0000000045: Ignored product
zv-0000000047: Quantity sold missing value
zv-0000000052: Ignored product
```

Reference	Rank	Value [$]	Percent [%]	Cumulative Value [$]	Cumulative Percent [%]
zv-0000000036	1	46.97	27.12	46.97	27.12
zv-0000000037	2	41.58	24.01	88.55	51.12
zv-0000000031	3	29.96	17.30	118.51	68.42
zv-0000000046	4	23.49	13.56	142.00	81.98
zv-0000000034	5	9.10	5.25	151.10	87.24
zv-0000000032	6	6.48	3.74	157.58	90.98
zv-0000000048	7	6.15	3.55	163.73	94.53
zv-0000000035	8	5.94	3.43	169.67	97.96
zv-0000000049	9	3.54	2.04	173.21	100.00
zv-0000000050	10	0.00	0.00	173.21	100.00

Tip: you can zoom in/out in the log window using *Ctrl + mouse wheel*. The default zoom level is reset on task switch.

Notes:

Undefined metrics are displayed with the **N/A** value.

Metrics based on incomplete data have the **(MD)** (missing data) value appended to the calculated value.

Log context menu

Right-click in the log area to see its context menu.
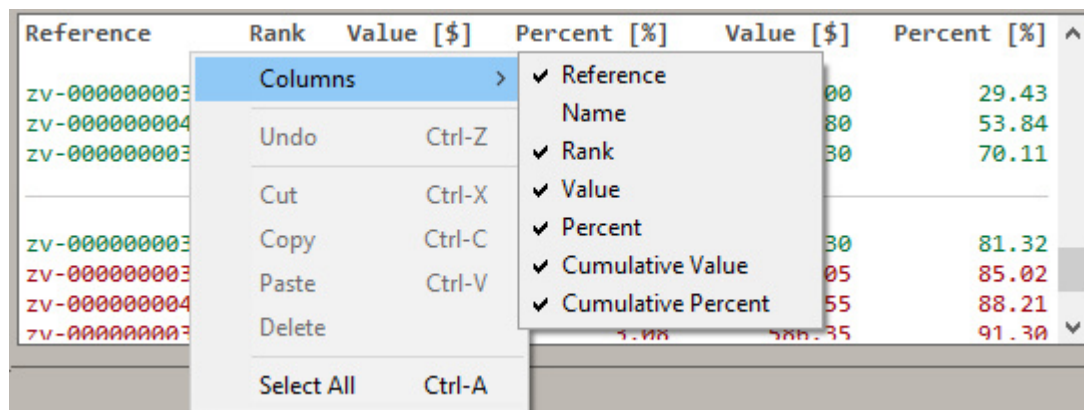
The following tools and options are available:

Columns lets you choose the columns to display in the log:

- Reference
- Name
- Rank
- Value (with the selected Currency symbol)
- Percent

- Cumulative Value (with the selected Currency symbol)
- Cumulative Percent

Copy lets you copy selected text from the log (*Ctrl + c*).

Select All selects all the text in the log (*Ctrl + a*).

Tip: To preserve the text colors and format when you paste the analysis results in another application, choose the paste method labeled *Rich Text Format, formatted text RTF or Keep format*.

Assortment Analysis Tools

Product Catalog Assortment Mode

In addition to viewing the results in the Assortment Analysis Log, you can also use the assortment analysis results to rank and filter items in the Product Catalog.

This is very useful to help you easily find the best performing products while you are building up your planogram.

To activate the Product Catalog *Assortment* mode:

1. Perform an **Assortment Analysis** as instructed in the above sections.
2. Switch to Products task.
3. Check the **Assortment** checkbox.
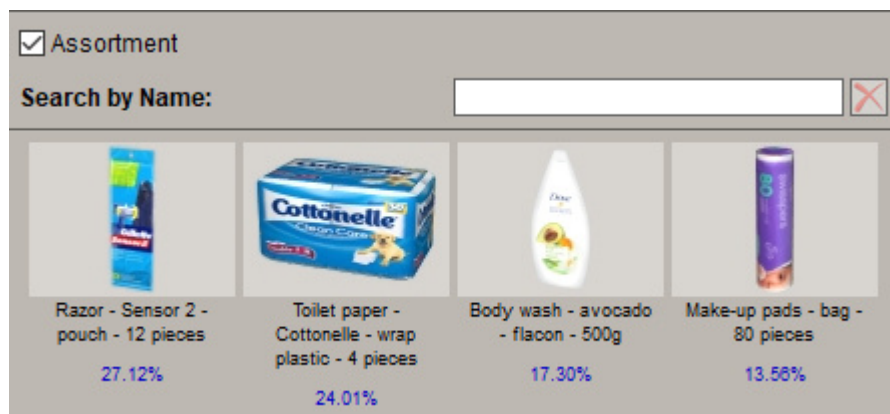
In this mode, the catalog displays a reflection of your assortment analysis results:

Products are sorted from the highest to the lowest performer.

Their respective performance percentages are displayed in blue text below the product thumbnails. The percentage values will differ if Restrict to Catalog Filters is checked or unchecked.

Low performing products (outside the specified Inclusion threshold) are hidden from the catalog listing.

Note: In *Assortment* mode, you can still Find Items by Text within the displayed products.

Note: Just uncheck the *Assortment* checkbox to display the product catalog with all products and without taking into account the assortment analysis results.

Notes:
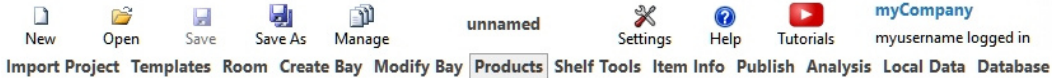
Undefined metrics are displayed with the **N/A** value.

Metrics based on incomplete data have the **(MD)** (missing data) value appended to the calculated value.

Tips and Tricks

If you often work with PlanogramBuilder you will find some valuable tips in this section. For example, if you learn the keyboard shortcuts for the features you use the most, using the program will be more fun and you will be more productive.

Mouse Tips

Left button click on empty zone of viewing area	Deselects selected item(s).
Left button double-click	Fully selects the content of an edit box. For example, to change the text for the title of the application (see Application Title), double-click in the edit box, then type immediately the new value.
Right button click	Opens a context menu. Such menus are available when the mouse cursor is on top of an edit box or inside the viewing area.
Scroll wheel	**Zoom**: When the mouse cursor is within the viewing area you can use your mouse wheel to zoom in and out (see Zoom). **Cycle between tasks**: When the mouse cursor is within the upper toolbar area, you can use the mouse wheel to cycle between tasks: *Cursor zone where you can switch task with the mouse wheel*.
Middle mouse button drag	When the mouse cursor is within the viewing area, you can use you can use this key and mouse combination to temporarily pan the view.
Ctrl+Middle mouse button+drag	When the mouse cursor is within the viewing area, you can use you can use this key and mouse combination to temporarily **orbit** the view.
Ctrl+Scroll wheel	When the mouse cursor is within a log text area, you can use this key and mouse combination to zoom in and out.

Keyboard Shortcuts

KEYS	EFFECT
A	Applies the **Default** (View All) command.
B	Selects the **Edit Bay** tool.
C	Temporarily disables collision detection (see Move Items).
D	Toggle the display of **Dimension Lines**.
E	Toggle the display of edges (see **Show Edges**).
F	Selects the **Field of View** tool.
G	Toggles the display of the **Grid**.
H	Toggles the **Orthographic View** mode.
I	Selects the **Edit Item** tool (to work with for products and accessories).
L	Toggles the **Locked Accessories** value for the selected bay(s).
N	Launch the **Add Generic Product** command.
O	Selects the **Orbit** tool.
P	Selects the **Pan** tool.
R	Selects the **Edit Room Element** Tool.
S	Selects the **Edit Bay Element** Tool (to work with *shelves* and other bay elements).
T	Applies the **Top view** command.
U	Turns a product **Upside Down** (see Rotating Products).
V	Toggles the **Schematic View** mode.
W	Selects the **Walk** tool.
Z	Selects the **Zoom** tool.
Ctrl + drag	Allows duplicating easily objects with the **Edit** tools (to copy room elements, bays, bay elements, Products and Accessories). Press ***Ctrl*** before clicking on the object and it will be duplicated when you start moving it.
Ctrl + C	Copies values from edit boxes.
Ctrl + V	Pastes values in edit boxes.

Ctrl + Z	**Undo**: reverses one or several operations (see Undoing your Changes). Also cancels changes in edit boxes.
Ctrl + Y	**Redo**: re-applies operations that were canceled by the *Undo* command (see Redoing your Changes).
Delete	Deletes the selected item(s) (see Delete Room Elements, Delete Bays, Delete Bay Elements, Delete Items).
Enter	**General**: Confirms changes in edit boxes. For example, after typing a shelf dimension, press *Enter* to apply the new value. **Database Editor**: Edits the selected row when not already in Edit Mode. Updates the current row if currently editing the row. Creates a new item when the focus is on any element on the Create line. **Project list**: Opens the selected project.
Esc	**General**: Exits the Full Screen mode. **Database Editor**: Cancels editing of the current row.
Left arrow	**Products**: rotates the selected product 90° to the left (around the × axis counterclockwise) (see Rotating Products). **Walk** mode: turns left.
Right arrow	**Products**: Rotates the selected product 90° to the right (around the × axis clockwise) (see Rotating Products). **Walk** mode: turns right.
Up arrow	**Products**: Rotates the selected product 90° to the back (around the Y axis clockwise). **Walk** mode: moves forward. **Database Editor**: Moves the focus to the row above the current one. **Project, database and catalog lists**: Selects the line above the currently selected line.
Down arrow	**Products**: Rotates the selected product 90° to the back (around the Y axis counterclockwise). **Walk** mode: moves backward. **Database Editor**: Moves the focus to the row below the current one. **Project, database and catalog lists**: Selects the line below the currently selected line.
Space	Increases the precision of the mouse for many tools, like **Edit** (see Move Items), **Zoom** (see Zoom), etc. Pressing the space bar temporarily "slows down" the mouse; this lets you achieve a better precision.
Space + Up / Down arrows	**Walk** mode: looks up / down
Tab	**Various panels:** move focus to the next GUI element. **Catalog lists**: move focus down in the classification levels.

Shift+Tab	**Various panels:** move focus to the previous GUI element**.**
	Catalog lists: move focus up in the classification levels.
Shift + drag a product from the catalog	Inverts the selected product(s) placement mode: this lets you place on a shelf a product defined as *pegged* in the database, or place on a peg a product defined as *standard* in the database.
Shift + drag while moving product(s) on a bay	Inverts the selected product(s) placement mode when moving a product (*pegged* or *standard*).
	See Move Items for details.
Minus (-) on numpad	For the selected product(s) in a planogram, decrements the number of *depth facings*. See Change Product Facing Count.
	Note: There is at least one product left.
Plus (+) on numpad	For the selected product(s) in a planogram, increments the number of *depth facings*. See Change Product Facing Count.
	Note: Once the product has been placed as many times as possible in the available depth, the value is reset to "auto".
Space + Minus (-) on numpad	For the selected product(s) in a planogram, decrements the number of *width facings*. See Change Product Facing Count.
	Note: There is at least one product left.
Space + Plus (+) on numpad	For the selected product(s) in a planogram, increments the number of *width facings*. See Change Product Facing Count.
Shift + Minus (-) on numpad	For the selected product(s) in a planogram, decrements the number of *height facings*. See Change Product Facing Count.
	Note: There is at least one product left.
Shift + Plus (+) on numpad	For the selected product(s) in a planogram, increments the number of *height facings*. See Change Product Facing Count.

Troubleshooting

This section contains explanations and workarounds for bugs and known issues.

Known Issues

Slow loading

Problem: It takes forever to open projects, to upload pictures or to Export Database.
Explanation: You may have a slow Internet connection to our servers.
Solution: You can test your connection speed to our server at https://planogrambuilder.zvisuel.com/downloads/speedtest/ If the reported speed is lower than 5 Mbits/s, it is normal that PlanogramBuilder takes a long time to upload and download items. Tip: Try to avoid working with a slow connection if possible: for example, switch from Wifi to Ethernet connection whenever it is available.

Products not displayed

Problem: I cannot see any product in the database preview area.
Problem: I cannot see any product on the shelves when I load a project or when I drag a product onto a shelf.
Explanation: some non-standard Microsoft Windows Internet settings may prevent file loading in PlanogramBuilder.
Solution: Reset Internet options: 1. Close PlanogramBuilder 2. Open *Windows Control Panel*. (**not** *Windows Settings*) 3. Click *Internet options*. 4. Click on *Advanced* tab. 5. Click on *Reset…* 6. Click *OK* to save the settings. 7. Close *Internet options*. 8. Restart PlanogramBuilder. 9. Now your products should display in PlanogramBuilder.

Product pictures not displayed

Problem: I've tried to upload an image of a product, but the preview shows a white object (or it still shows the old picture).

Solution: Please do the following:

In Database Editor, click on the line of the product in the list to refresh the 3D preview.

Blurry text in the GUI

Problem: The texts in PlanogramBuilder user interface are blurry.

Explanation: Scaling on Windows display is not always well-supported.

Solution 1: Set the PlanogramBuilder monitor to 100% scale:

1. Close PlanogramBuilder.
2. Open *Windows Settings > Display*.
3. Click on the display where PlanogramBuilder was opened.
4. Under *Scale and layout > Change the size of text, apps and other items* to 100%.
5. Restart PlanogramBuilder.

Solution 2: Set the PlanogramBuilder monitor as the primary display:

1. Close PlanogramBuilder.
2. Open *Windows Settings > Display*.
3. Click on the display where PlanogramBuilder was opened.
4. Under *Multiple displays*, check *Make this my main display*.
5. Restart PlanogramBuilder.

Solution 3: Fix scaling for apps in Windows:

1. Close PlanogramBuilder.
2. Open *Windows Settings > Display*.
3. Under *Scale and layout*, Click *Advanced scaling settings*.
4. Under Fix scaling for apps, turn on *Let Windows try to fix apps so they are not blurry*.
5. Restart PlanogramBuilder.

Solution 4: Restart the computer:

1. Close PlanogramBuilder.
2. Restart the computer.
3. Restart PlanogramBuilder

Notes:

- On older Windows versions, display settings are accessed from Windows *Control Panel*.
- You may have to apply several of the above solutions to fix the blurry text issue.

Assistance

If you purchased through a reseller providing support, please contact him directly for assistance in your language. You can check in our reseller list if your reseller provides support service.

If you purchased through zVisuel or if your reseller doesn't provide support, you can contact us directly in English or in French.

Email

mailto:planogrambuilder@zvisuel.com

Email support is free and we usually reply to your messages within the next business day.

Phone

+41 (0)21 311-52-53

Phone support is available at standard rates during Swiss office hours on weekdays (9h-12h, 14h-18h, GMT+1).

Remote session

zVisuel can connect to your computer to assist you through a real time support session. Please first call or email us to if you think you need a remote assistance. Download the remote support client application only if you are asked to do so by our support team.