GoPlanogram®
Administrator Guide

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Create and Upload a Product Catalog,
Create and Upload Product Pictures,
plus other tips for getting the most
out of your GoPlanogram site.

GoPlanogram Team
support@goplanogram.com
sales@goplanogram.com

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Welcome

GoPlanogram is designed to be easy to administer for anyone with basic Excel skills. This document has two essential sections:

- Product Catalog
- Pictures for Products

Following the directions in these two sections will get your site up and ready for designing planograms.

Extending and Customizing product data is a second step that allows you to get more out of your planograms. That is covered in section:

- Custom Fields, Properties, and Aggregates

Product Catalog

The way you upload products to your GoPlanogram site is via a spreadsheet with one row for each product plus the header row at the top. This file is always the "truth" of your product database. Uploading this file replaces your previous upload data. To add a product, simply add a row, save the spreadsheet and upload it. To delete a product, remove the row, save the spreadsheet and upload it.

The GoPlanogram server saves all old copies of your product catalog uploads. So, if you mess up your copy or lose the file, send us e-mail and we can recover any file that you have uploaded.

How to Create the Products Catalog

GoPlanogram supports three file formats for uploading your products and custom fixtures to the site.

1. **Recommended**: Excel spreadsheet .xlsx file
2. Comma Separated Values as .csv
3. Tab Separated Values as .txt

The input that will be used to create the Products Catalog is a spreadsheet file with a particular format. The simplest approach is to start by creating an Excel spreadsheet similar to our sample file **SampleSpreadsheet.xlsx**.

Download SampleSpreadsheet.xlsx

Your spreadsheet must contain all the **required** columns but can contain any optional columns you wish. The column header names must be spelled and cased exactly as the column headers of the SampleSpreadsheet. The columns can be placed in any order. Note: if a column below is marked "optional" either the entire column can be omitted or the column header can be present and any cell can be omitted (i.e. blank). Columns marked **recommended** are also optional, but we recommend that you supply that data for the best results.

	A	B	C	D	E	F	G	H	I	J	K
1	ProductID	CatalogName	CatalogCategory	CatalogSubcateg	UPC	PictureFilename	Height	Width	Depth	Price	Cost
2	99482418939	365 Spring Water 1 gal. Bottle	Beverages	365	00099482418939	00099482418939.1.png	15.06	5.19	5.19	12	8
3	99482418915	365 Spring Water 50.7 fl. oz. Bottle	Beverages	365	00099482418915	00099482418915.1.png	12.2	3.39	3.39	23	13
4	41508600309	Natural Spring Water 1L Glass Bottle	Beverages	Acqua Panna	00041508600309	00041508600309.1.png	12.2	3.38	3.38	21	11
5	41508600057	Natural Spring Water 250mL Glass Bottle	Beverages	Acqua Panna	00041508600057	00041508600057.1.png	6.99	2.22	2.22	14	9
6	41508000055	Natural Spring Water 500mL Plastic Bottle	Beverages	Acqua Panna	00041508000055	00041508000055.1.png	9.12	2.57	2.57	21	14

NOTE: If your GoPlanogram website must use **metric** dimensions, everywhere "inches" appears below becomes "centimeters" (or millimeters if you request that option). Contact support@goplanogram.com to switch the site to Metric.

Product Catalog Fields

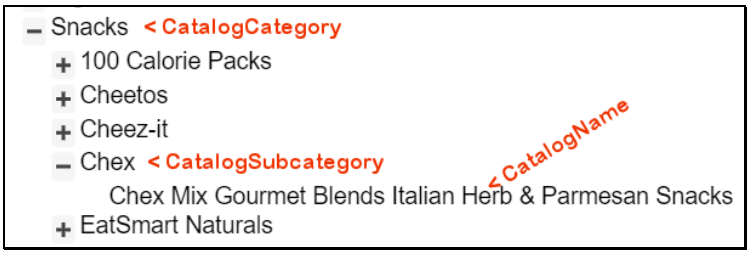
ProductID (**required**) – a text string, max 50 characters, it cannot be blank and must be unique (that is no two products can have the same ProductID).
Hint: examples of valid product id's are: your SKU number, or the item UPC code, or even simply a count from 1 to n.

Width (**required**) – a decimal number specifying product width in inches, centimeters or millimeters. Note the default is inches, if you want metric, please ask GoPlanogram support. (see Note).

Height (**required**) – a decimal number specifying product height in inches (see Note)

Depth (optional) – a decimal number specifying product depth in inches (see Note)

> Note: For Width, Height and Depth, the data may have spaces as well as traditional measurement strings like 'in', '"', 'mm', 'cm'.



CatalogName (**required**) – a text string, max 150 characters.
The name of the product item as it will appear in the Products Catalog.
Example: Planters' Peanuts, 4 oz with Mr. Peanut logo

CatalogCategory (**recommended**) – a text string, max 150 characters (see Note).

The major category that the product item belongs to.
Example: Snacks

CatalogSubcategory (optional) – a text string max 150 character (see Note).

Example: Chex

CatalogSubsubcategory (optional) – a text string max 150 character (see Note).

Example: Single Serving packs

> Note: An item cannot be in a subcategory without also being in some category. For example, if a **CatalogSubCategory** is specified for an item, then a **CatalogCategory** must also be specified. Likewise if a **CatalogSubsubCategory** is specified, then both a **CatalogSubCategory** and a **CatalogCategory** must be specified.

ShortDescription (**recommended**) – a text string, max 150 characters.

An additional text field you can use for product details or whatever you want.

UPC (optional) – a text string specifying the Universal Product Code.

PictureFilename (**recommended**) – a text string, max 150 characters, specifying the name of the image file (see Note 2 for the format)

PegholeDown (optional) – a decimal number specifying distance of peghole from top of product in inches (defaults to 0.25 inches if blank or zero)

PegholeRight (optional) – a decimal number specifying distance of peghole from left of product in inches (defaults to center if blank or zero)

Peghole2Down (optional) – a decimal number specifying distance of peghole from top of product in inches (defaults to 0.25 inches if blank or zero)

Peghole2Right (optional) – a decimal number specifying distance of peghole from left of product in inches. If omitted, no 2nd peghole is shown. If negative, creates a 2nd peghole symmetrically placed with 1st peghole.

BestSelling (optional) – a decimal number specifying how rapidly a product sells. Higher numbers indicate more rapid sales (see Note 1 for format).

Price (optional) – a decimal number specifying product price (do not include $ prefix). Examples: 10, 5.00

Cost (optional) – a decimal number specifying product cost (do not include $ prefix). Examples: 10, 5.00

Hidden (optional) – a single character. "F" (default) indicates that the catalog item will be shown in the catalog. "T" indicates that the catalog item will not appear in the catalog (but any groups or planograms containing that item will still show the item).

Type (optional) – a single character specifying the product type.

- "S" or blank (default) indicates a standard product.
- "CF" indicates a custom fixture. Custom fixtures have a unique ProductID, a name (CatalogName), a picture (PictureFilename) , and Height and Width. Custom fixtures support smooth snapping (products dropped on custom fixtures stick to the fixture and can be smoothly moved to any position on the fixture).
- "BI" indicates a background image. Background images (also called wall skins) are fixed size images that appear behind everything else.
- "Sign" for any merchandising or sign.
- "P" indicates a item that can contain other products, such as a panelboard backer or custom rack. "P" items will snap to legal peghole positions, but items placed on "P" items can be place anywhere on the "P" item.
- "U" indicates a product that can contain other products, where the contained products snap to legal peghole positions, such as a uni-rack backer.

HookID (optional) – a single character specifying the hook type.
J (or blank) indicates a J hook.
S indicates a straight hook.
L indicates a loop hook. .
Loop hooks and straight hooks will cause snapping to a position between 2 holes, J hooks will cause

snapping to a position directly over a hole. Loop hooks will appear as an oval. Straight hooks and J hooks will appear as a circle.

CatalogNum (optional) – an alternate product number or name for the product. If this column is present and has non-blank values, "Catalog Labels" will appear in the "Show" pulldown menu. If "Catalog Labels" is selected, the CatalogNum value will be displayed directly on the planogram. Warning: values in this field should be kept short. Long strings displayed on the planogram products may extend beyond the bounds of the product, overlapping adjacent products.

AcctID_XXX (optional, Pro only) – a text string, max 50 characters, identifying an alternate product number used by a particular account or channel.

You may distribute your products via multiple distibutors or "accounts" which may handle a subset of your products and have their own product numbers for your products. For example, a column header labeled AcctID_HomeDepot would allow you to specify a set of product numbers used by the account "HomeDepot". Leaving this entry blank would indicate that the "HomeDepot" account did not handle a particular product.

Note that your GoPlanogram Administrator must enable this capability for you. If enabled, the GoPlanogram user interface will allow you to select and account and apply appropriate numbers and/or colors to the products on your planogram to indicate the account they belong to.

Custom Field Columns (optional)
Other columns where the column header is prefixed with a "#" character are treated as Custom Fields (see Custom Properties and Custom Fields.doc for more details).

For example, if you wanted to add **Brand** as a field associated with each product, you would put **#Brand** in the column header.

Note you get 10 Custom Fields.

You can then make that field visible via **File > Customize Fields (Edit Properties)**. Click the **Add Property** button, then enter Brand in the **Name** field and #Brand in the **Expression** field. Then check the **Product Details** checkbox.

Any additional columns are ignored by GoPlanogram.

How To Create the CSV File From the Spreadsheet

This section deprecated, we don't recommend use of CSV now that uploading .XLSX is supported.
You are editing an Excel .xlsx file. Do the following steps:

File > Export

Click Change File Type

Click CSV

Click Save As

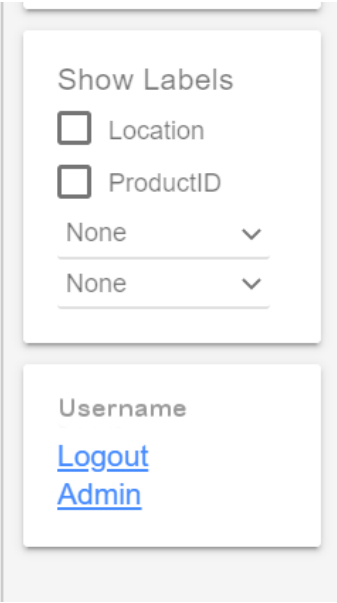
save the CSV file.

Here is the tricky part... you are now editing the .CSV file in Excel, not the .XLSX file you were. So if you make more changes, they don't end up in the .xlsx file.

What we recommend is just **Exit Excel after every Export CSV**, then re-open the .xlsx file when you want to edit again. For me, this is the simplest way not to confuse myself.

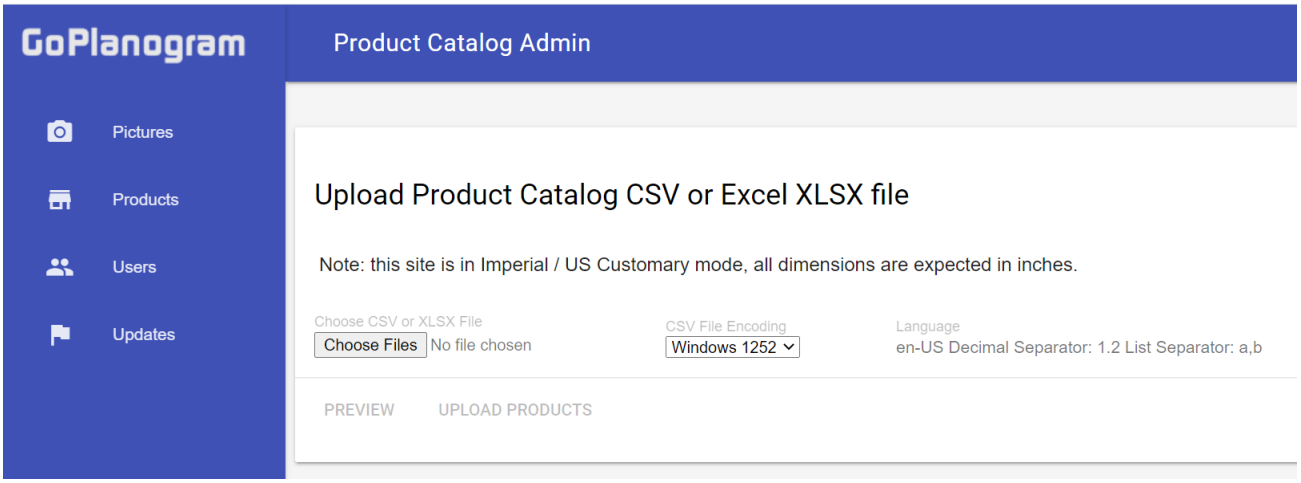
Uploading the Product Catalog XLSX file

To upload your Product file to the GoPlanogram website, run GoPlanogram and click the **Admin** link on the right of the page



The Admin link is only visible if your account has the appropriate privileges. If you do not see this button, please contact your GoPlanogram account administrator or support@goplanogram.com.

Then click on the **Products** link on the left.



Click **Choose Files** and choose the file. Then click **UPLOAD PRODUCTS**

Your new file will be checked and if any errors are detected the existing GoPlanogram catalog will not be replaced.

If you get an error uploading, don't hesitate to contact support@goplanogram.com for help.

When you switch back to the main GoPlanogram page, you should see the Product Catalog refresh itself.

Note: we save all the uploaded files on the server if you ever need to recover an old copy.

Pictures for Products

In the Products.XLSX file that you upload, there is a column named **PictureFilename**. For each product, you fill that cell with the name of the file that you upload separately.

You also set the Width, Height and Depth are in inches of that product in real world dimensions (or CM or MM if you are running in Metric mode).

Your picture (the front view) can be any resolution, but should be proportional to the Width / Height you give.

So a product that is 5" wide and 20" tall should have a picture with 4 times the pixels vertically as it does horizontally. GoPlanogram will squish the picture you give us into the dimensions.

As a rule of thumb, a picture should have at least 10 pixels of size for each real-world inch. (so a 5" x 20" package would have an image of at least 50 x 200 pixels.)

Having higher resolution pics is fine, but at some point, images that are too large can slow down the planogram editing. We have an Admin function that will downsize the pictures for you.

Pictures should be cropped (not have borders)

Here is a sample picture. Here, the blue line is the actual border for the picture. This is a fairly typical marketing image that would be used in online shopping carts.

But all that white border is wrong for planogramming. When you tell GoPlanogram that this product is 5” x 20”, it will look like this in the planogram:

A properly cropped image is the image you want.

You may have the fully cropped images.... that is great if you have them. If not, we have a program that can crop the extra white space quickly. Contact support for details.

This is exactly the straight on view you want for planograms.

Picture Background Transparency

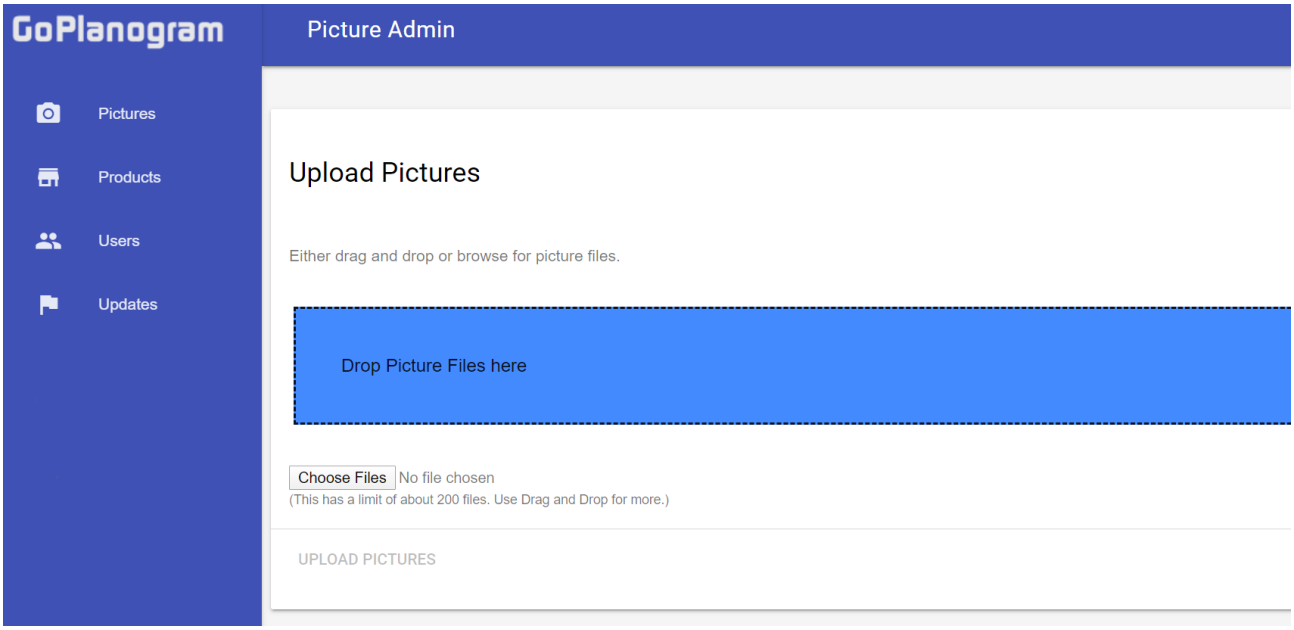
Some packages are not complete rectangles, as the blue area at the top of the previous picture shows. If you upload .PNG pictures with transparent sections, GoPlanogram will support that. Note that .JPG files do not support transparency.

When your products are displayed on a non-white background, then transparency is more important in making a nice display, as the sample of a custom drink cooler shows.

The pictures with transparency on the bottom shelf just look better.

Uploading Pictures

Go to the Admin Pictures Page.



Either Drag and drop a group of files to the blue box, or use **Choose Files** to browse. (Some browsers may only have the browse option.)

Then click **UPLOAD PICTURES**.

Front, Side and Top Orientations

GoPlanogram also supports Front, Side and Top images.

Front and Front 90

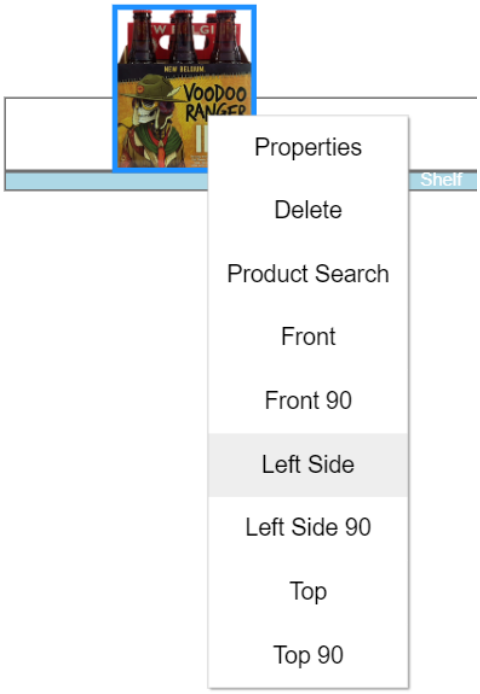
Side and Side 90

Top and Top 90

To set this up, replace the extension .png or .jpg with .1. The side image is extension .2 and the top is .3.

In your Products.XLSX, just specify the .1 as PictureFilename. In this example, the Voodoo Ranger IPA would have files 75452700066.1 75452700066.2 and 75452700066.3

Then you can set orientation in the editor with the right-click menu.



If you don't have the Side or Top pictures, you will still be able to set the product orientation, but the Front image will get stretched to fit the Side or Top dimensions.

Custom Fields, Properties, and Aggregates

Introduction

Custom Fields, Properties, and Aggregates allow you to perform your own calculations to customize the product information that is displayed in GoPlanogram.

Fields

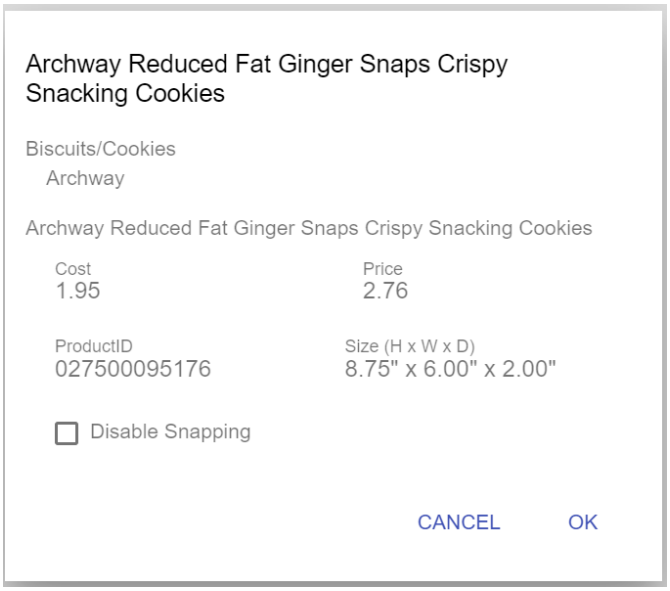
A Field is a basic unit of information about your products. Fields can be:

- **Standard Catalog Fields**
  These are fields that change only when the catalog information is updated. The Standard Catalog Fields are defined in the uploaded catalog file (see Product Catalog).
- **Built-In Dynamic Fields**
  These are fields whose values may change depending on user interaction with the planogram. These fields are:
    - **BayNumber** – an integer. 0 if the product is not on a pegboard. Otherwise a number indicating the bay number on which the product is placed (where a "bay" is considered a section between 2 standards.
    - **Fixture –** a string. The name of the fixture the product is on, or the empty string if the product is not on a fixture.
    - **Rack –** The name of the pegboard the product is on, even if the product is on a shelf that is attached to the pegboard.
    - **LocationID** – an integer. LocationIDs are simply a number identifying the product location on the planogram. LocationIDs are assigned from left to right and top to bottom for each fixture on the planogram. LocationIDs provide a simple index to facilitate looking up a product on the placement report.
    - **PositionDown** – a decimal number indicating the vertical position of the product on fixture. If the fixture is a pegboard, PositionDown indicates the number of pegoles from the top of the pegboard. For shelves, PositionDown is 0. For all other fixtures, PositionDown indicates the number of inches down from the top of the fixture.
    - **PositionAcross** – a decimal number indicating the horizontal position of the product on fixture. If the fixture is a pegboard, PositionAcross indicates the number of pegoles from the left edge of the pegboard. For all other fixtures, PositionAcross indicates the number of inches across from the left edge of the fixture.
- **Custom Catalog Fields (#)**
  Any field whose header is prefixed with a **#** character in the uploaded catalog XLSX file. GoPlanogram Standard supports up to 10 Custom Catalog Fields.

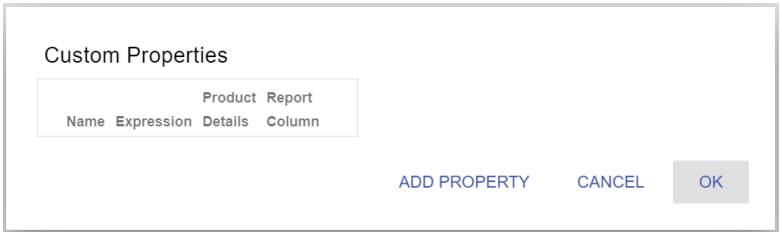
Displaying Fields in Tooltip and Properties Dialog

When you start with a new GoPlanogram site, this is the default tooltip for a product:

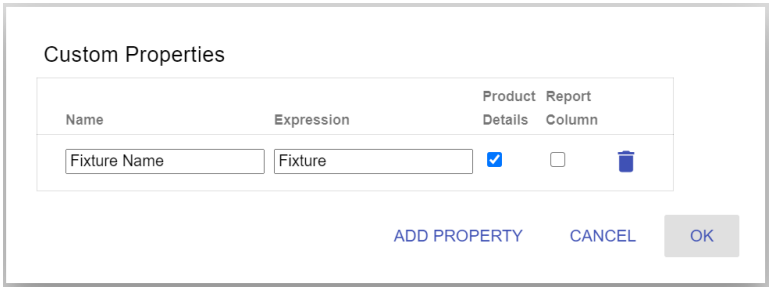
And this is the default properties dialog for a product. Note Cost and Price standard fields are included if you have defined them in the Product Catalog file.



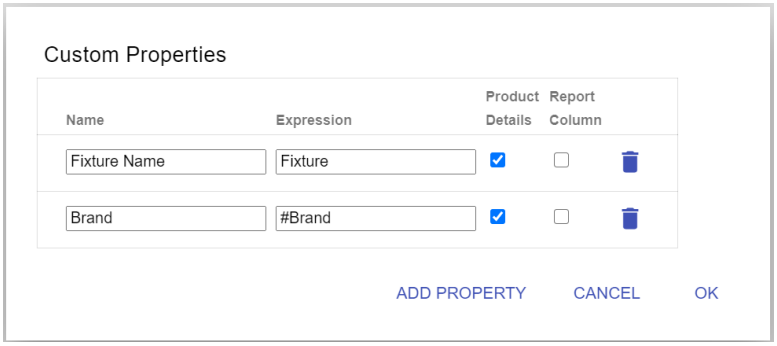
To customize this for all users, the Admin can go to **File > Customize Fields**, and then Click the **EDIT PROPERTIES** button, and you will see:



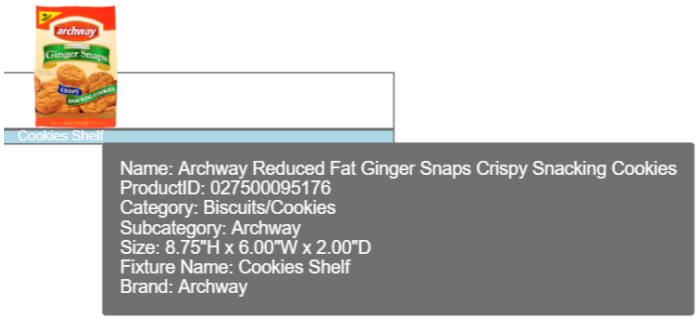
Click **ADD PROPERTY**, then pick any Name and use Fixture as the Expression. (Note Fixture is one of the Field Names defined above.) Also check the Product Details (this will include the Property in the tooltip and the Properties Dialog).



Click **ADD PROPERTY** again, and we will add the #Brand custom field (one of the 10 Custom Fields you can define in the Product Catalog).



And now click **OK**. And check the tooltip for our sample product:



Functions

Functions include Basic Functions and Aggregate Functions. They are similar to Excel functions and work in the context of the products on a planogram.

Basic Functions

Basic functions operate on a single product and take zero or more arguments. They return a single value. Basic Functions currently include:

- Format(exp, format)
  where: "exp" is a Property Expression
  "format" is a numeric format specifier string consistent with
  Microsoft.NET Standard Numeric Format Strings

The Format function formats the Property Expression according to the specified format.
For example:
Format(123.0,C) returns $120.00 (C is for Currency)
Format(.23,P) return 23%

- Int(exp)
  where: “exp” is a Property Expression

  The Int function return the integer value of the Property Expression (the value of the Property Expression minus any fractional component).

- IsOnShelf()

  The IsOnShelf() function returns 1 if the product is on a shelf and 0 otherwise.

- IsOnPegboard()

  The IsOnPegboard() function returns 1 if the product is on a pegboard and 0 otherwise.

- FixtureDepth()

  The FixtureDepth function returns the depth of the containing fixture for the product. If the product is not on any fixture, 0 is returned

- NumFacings()

  The NumFacings() function returns the total number of facings of the product SKU on the planogram (the total number of products with the same SKU on the planogram).

Property Expressions (doing math with fields)

Property Expressions allow you to combine the fields and functions defined above using the following arithmetic operators (+,-, *, /) and parenthesis.

Example Custom Properties

NOTE: in the following examples, a variable preceded by # is assumed to be defined as a Custom Field in the product XLSX file.

The following are examples of legal Custom Properties that you can add to the tooltip, Properties Dialog and Reports.

Property Name	Property Expression	Tooltip	Report
QtyOnHook	Int(FixtureDepth() / Depth)	✓	✓
Stacked Price	Price* Int(FixtureDepth() / Depth)	✓	✓
Stacked Cost	Cost* Int(FixtureDepth() / Depth)	✓	✓
Margin	Format((Price-Cost)/Price, P)	✓	✓
Finish	#FinishType	✓	✓

Aggregate Functions

Aggregate functions operate on a collection of products and return a single value. Aggregate functions are frequently used to produce a sum or average of an entire column in a report, however they can also be used to compute more complex results based on multiple columns of the report.

When an Aggregate Function is used in a report, the collection is defined by the rows of that report.

The collection for an Aggregate Function used in the Placement Report will have 1 entry for every product facing in the planogram.

The collection for an Aggregate Function used anywhere else (such as tooltips) will have 1 entry for every product facing in the planogram.

The Aggregate Functions currently include:

- Sum(exp)
  where: “exp” is a Property Expression

  The Sum function sums the result of evaluating the Property Expression for every row in the report.

- Avg(exp)
  where: “exp” is a Property Expression

  The Avg function sums the result of evaluating the Property Expression for every row in the report and then divides by the number of rows in the report.

Example Custom Aggregates

Custom Aggregates are simply named Property Expressions where the Property Expression consists of an expression of Aggregate Functions.

The following are examples of legal Custom Aggregates:

Property Name	**Property Expression**	**Report**
Total Display Price	Sum (Price* Int(FixtureDepth() / Depth))	✓
Total Display Cost	Sum(Cost* Int(FixtureDepth() / Depth))	✓
Total Weight	Sum(#Weight* Int(FixtureDepth() / Depth))	✓
Avg Margin	Format(Avg((Price-Cost)/Price, P))	✓
Gross Margin	Format((Sum(Price)-Sum(Cost))/Sum(Price),P)	✓
Items on Shelf	Sum(IsOnShelf())	✓
Items on Pegboard	Sum(IsOnPegboard())	✓
Total Item Width on Shelf	Sum(IsOnShelf()*Width)	✓
Total Pegboard Space	Sum(IsOnPegboard() * ((Width+1)*(Height+2)))	✓