

PlanoGraphics™ 3.5



Windows

PlanoGraphics 3.5

User Guide

by Mediatronic Systems

PlanoGraphics 3.5 sets a new standard for affordable planogramming software and goes one step further than traditional planogramming software. With advanced graphics features like composite imaging, automated planogramming, wizards that guide you through making planograms and product catalogs and access to virtually any database file format PlanoGraphics gives you superior results at a fraction of the price of any other planogramming software package.

PlanoGraphics 3.5 User Guide

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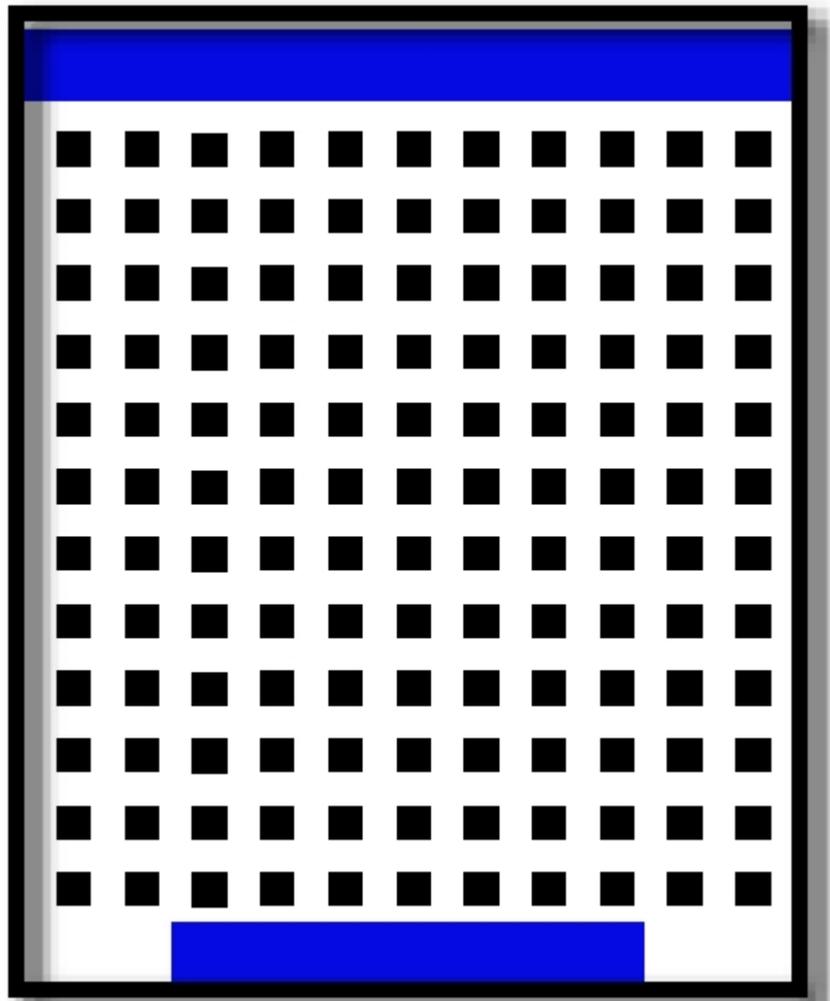
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PlanoGraphics™ 3.5



Part

I

Introduction

1 Introduction

1.1 Overview

PlanoGraphics™ 3.5

PlanoGraphics is the affordable picture based planogram program that lets you share your picture perfect planograms in a variety of formats.

PlanoGraphics 3.5 sets a new standard for affordable planogramming software and goes one step further than traditional planogramming software. With advanced graphics features like composite imaging, automated planogramming, wizards that guide you through making planograms and product catalogs and access to virtually any database file format PlanoGraphics gives you superior results at a fraction of the price of any other planogramming software package.

The making of a planogram in PlanoGraphics is a three step process :

- 1) Create a product catalog in the catalog manager^[24] OR create a data link to an external data source or file like an Excel file^[28] or Access file^[27].
- 2) Link product images^[32] to your catalog by using the catalog manager.
- 3) Create a new planogram^[40] document and add products to the planogram from your product catalog.

The product catalog and image linking process is only required once. After you have done the first 2 steps above you can reuse the same product catalog for all your planograms.

The product catalog is much like a spreadsheet with rows and columns. Each product entry in the catalog corresponds to a row in your catalog file. Each column in your catalog represents a product attribute like the product name, description, size, etc. Each product entry in a catalog has a picture name attribute, which is a link or reference to the location of a product picture file. This file is a separate from the catalog.

Once you have a product catalog made you can start making a product display. You build your wall display by browsing through your product catalog and adding the products you want on your wall display. You move your products around on the display by simply clicking on a product and dragging to the position you want. Once you have finished your display you can save it, export it or print it. The first step in making a planogram of your products is to make a product catalog.

PlanoGraphics can also build your display for you automatically. Just check off the products in your product catalog that you want in your display, set the builder options and then click on the "Build Display" button. PlanoGraphics then automatically builds your display for you in usually 10 seconds or less.

PlanoGraphics can also build "smart planograms" for you. PlanoGraphics can filter and analyze information about each product you have in your catalog or data source and figure out the smartest way to place them in your display automatically allowing you to prototype dozens of planograms in a matter of minutes.

1.2 What's New in version 3.5

PlanoGraphics 3.5 continues to set the standard for affordable planogramming software with several new features that will help you make better looking planograms faster.

Automated Updates - PlanoGraphics automatically checks for and informs you when new updates are available. Installing new updates now requires just a single step, single click on the INSTALL UPDATE button. PlanoGraphics then automatically downloads and installs your updates without any further steps required.

Nudge - Single products and product groups can be nudged using the arrow keys for fine control and placement (more information [471](#)).

Delete Key - Products can now be deleted using the delete key in addition to using menu commands.

Duplicate - Products in your planogram can be quickly duplicated by using the Ctrl-D key combination or EDIT >> DUPLICATE in the main menu.

Numeric Positioning - Single products and product groups can be positioned to an exact X, Y position by entering inch or centimeter values in the X, Y position panel in the upper left corner in the main program window (more information [471](#)).

Two New Catalog Column Types - A Brand column and Category column are available are included in the default product catalog.

More Placement Box Color Choices - Previous versions of PlanoGraphics automatically colored product placement boxes based on the product's size. Now PlanoGraphics lets you select the method of coloring based on, size, product category, product brand, black & white wire frame or assign your own custom color (more information [491](#)).

Load Product List Feature - This feature allows you to load a list of products to your planogram from a text file. When you load a list of product part numbers from a text file, PlanoGraphics automatically searches for the products in your product catalog or database and adds either a single product or one or more rows of the product to your planogram. You can then try other planogram configurations for the loaded product list by changing options under the Builder tab in the selector or manually fine tune the planogram by repositioning items with the mouse pointer (more information [431](#)).

More Tags - Three new tags are available, category, brand and custom text. The custom text tag lets you add any custom text to the tag.

Flip Tag - Allows you to flip tags 90 degrees. Useful for products that are tall and thin.

Streamlined Editing Of Fixtures - In Previous versions of PlanoGraphics the Update Selected Fixture Button needed to be clicked to commit any changes made to a fixture through the Fixture tab on the selector. Now the fixture is automatically updated whenever one of the fixture's parameters are changed. Changes to width, height and depth parameters however must be confirmed with the return key to commit the change. In addition a bug that caused some of the size parameters to change by themselves when working in inches and a bug that caused fixtures drawn with the fixture drawing tools to render at the wrong size when working in inches are now fixed.

Simplified Picture Optimization - To optimize a picture in the picture editor simply open the picture in the editor and click on PICTURE >> OPTIMIZE SIZE, then enter the product size. The picture is optimized based on the sizes you entered (more information [351](#)).

Context Popup Menu - A context popup menu containing some of the main commands for manipulating products can be accessed by clicking on a product in your planogram with the right mouse button.

Settings Saved with Planogram - Most document settings like which tags are turned, picture or placement box mode are now saved with the planogram document, saving you from having to reset these settings for a particular planogram document every time you restart the program.

Recent Document History - The location of the last 5 documents that you worked on are saved can be accessed through FILE >> OPEN RECENT in the main menu, giving you fast access to the most popular planogram documents.

Document Selection - When working on many planogram documents at the same time you can get a quick list of all open documents by clicking on VIEW in the main menu. The all open planogram documents are listed at the end of the VIEW menu. To select and activate any of the open documents select the document name in the list.

1.3 Other Key Features

- Direct Data Access - Create planograms using any ODBC data source, including:
 1. Microsoft Excel Spreadsheet files
 2. Access database files
 3. Microsoft SQL database servers
 4. ORICAL databases
 5. dBase
 6. Any ODBC data source
 7. Any ADO data source
- Fixture Features
 1. Fixture Drawing Tools - Quickly and interactively add all fixture types.
 2. Create beveled or flat fixtures.
 3. Add any fill color to any fixture.
 4. Add text to text boxes directly on the text box fixture.
 5. Customize fixture fill styles for unique looking fixtures.
 6. Edit any fixture's attributes on the fly. Eliminates having to delete and add a new fixture when you want to change an existing fixture.
- Fully Integrated Report Writer. Create the following report types:
 1. Product Listing
 2. Investment and Profit
 3. Space Usage
 4. Fixture Listing
 5. Sales Ranked by Units Moved
 6. Sales Ranked by Turnover
 7. Sales Ranked by Profit
- Adobe Acrobat PDF Output
 1. Built-In PDF engine lets you export your planograms and any built-in reports to a single PDF file and does not require Adobe Acrobat or Acrobat Distiller.
 2. Password protect and encrypt with 48 bit or 128 bit encryption for secure internet transmission.
 3. Compress PDF files for easier transmission over the Internet.
 4. Make screen optimized or print optimized PDF files.
 5. Control print, copy and editing rights.

- New Tags
 1. Reorder alarm tag visually alerts you when inventory levels are low.
 2. Units Sold tag visually informs you of a product's sales performance.
 3. Current Inventory Level tag visually informs you of a product's inventory level

- Flip Products to show the following facings:
 1. Front (default)
 2. Side
 3. Top

- Product Placement Control
 1. Align feature aligns grouped items on top or bottom edges.
 2. Space feature adds space between grouped products.
 3. Add Product Alignment feature allows you to set the alignment behavior when you add new products to your planogram.
 4. Wrap Direction feature allows you to control the product wrapping direction when an added product has reached the end of a row.
 5. Flip To feature makes it possible to show front, side or top of product.

1.4 Product Registration and Activation

You can use the demo version as long as you like. If you would like to remove the demo restrictions will need to purchase a registration number to continue to use the program. You can purchase a registration number by visiting www.planographics.com.

Once a registration number is purchased you can enter the registration number by clicking on REGISTRATION in the main menu. Enter your name and registration number and company name (if any) in the registration dialog box. You will need to be connected to the Internet to successfully enter your registration information. When you enter your registration number your copy of PlanoGraphics is automatically activated through the Internet and upgraded to the full version of program.

What is activation?

License activation ensures that software is not used on more computers than authorized by the license, specifically the unauthorized sharing of software through casual copying. Present licensing rules allow you to install PlanoGraphics on two computers as long as you are the primary user of the program and the two copies are not run at the same time.

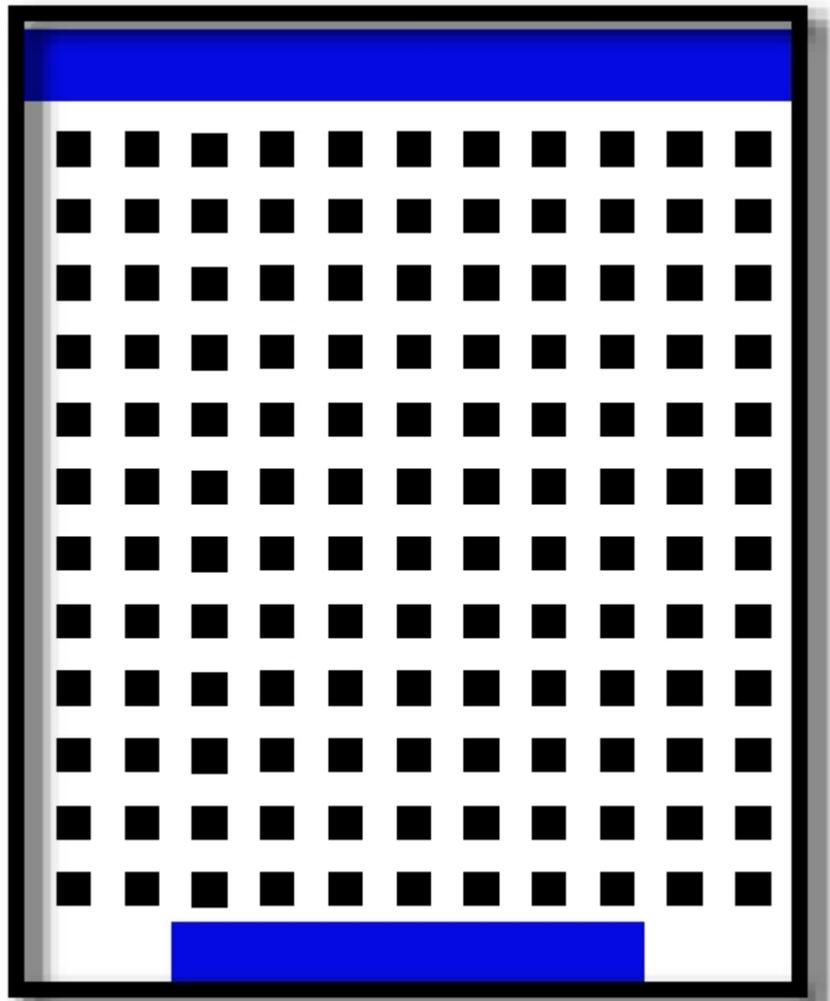
Activation is automatic when you enter your registration number and only takes a couple of seconds to complete. There is no personal information sent to Mediatronic during this process.

Activation is required in order to run the full version of PlanoGraphics.

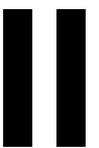
If you wish to deactivate your license and permanently move your license to another computer contact customer service at info@planographics.com and request an activation transfer.

If you are unable to connect to the Internet during the registration activation process or if you connect to the Internet through a proxy server then contact us info@planographics.com for instructions on manual activation.

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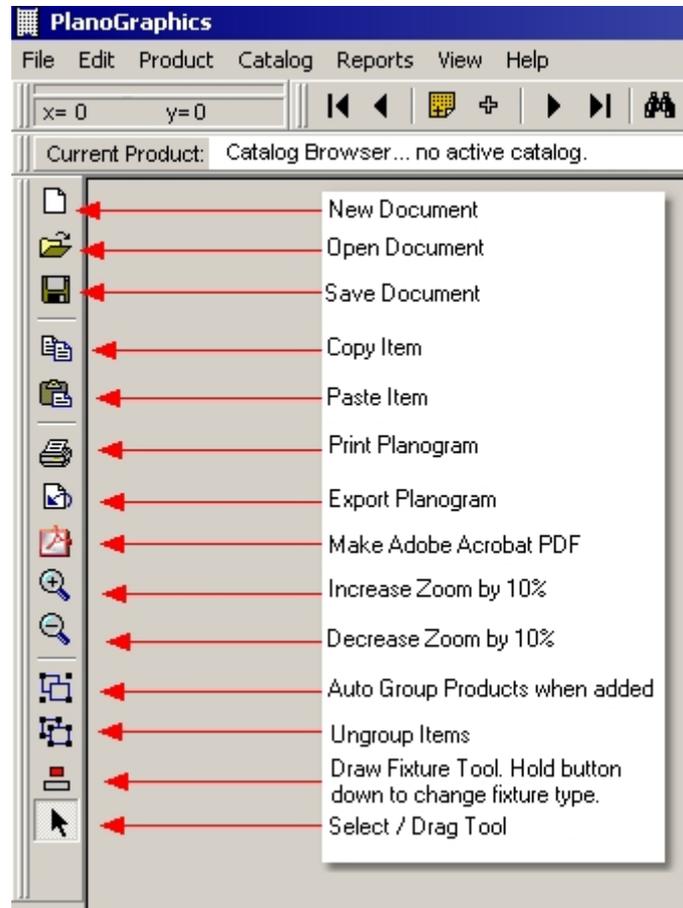


User Interface

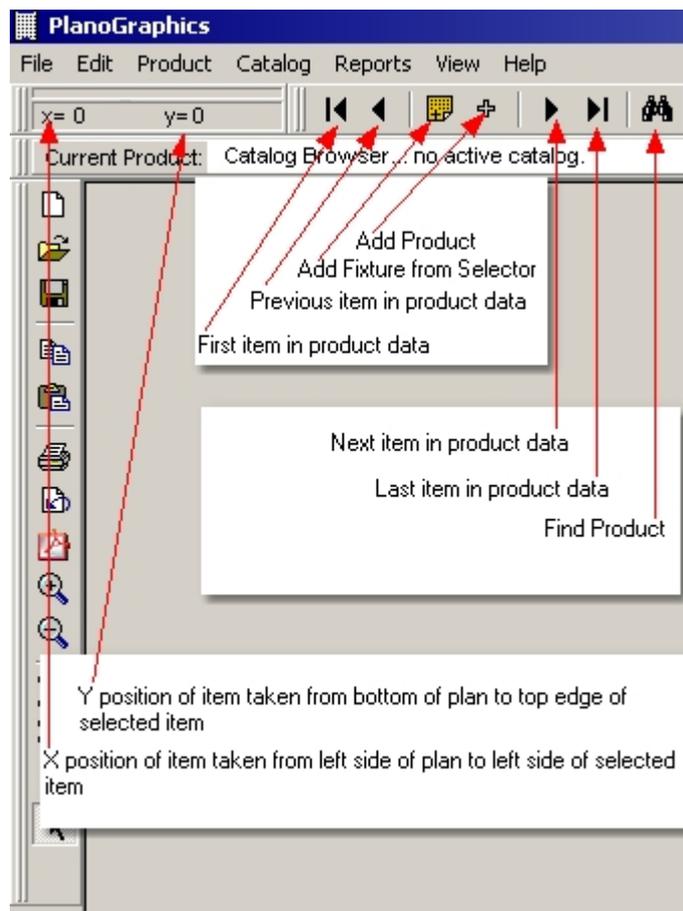
2 User Interface

2.1 Main Work Space

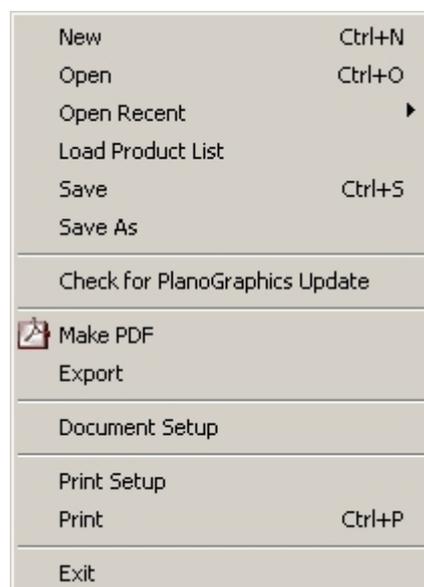
The side tool bar has speed buttons to commonly used program commands and features.



The top tool bar has the product database browser and speed buttons for navigating through product data and adding products or fixtures.



2.2 File Menu



New - Creates a new planogram document. (more info [40](#))

Open - Opens a new planogram document.

Open Recent - Lists shortcuts to the five most recently opened planogram documents.

Load Product List - Creates a planogram based on a list of product numbers in a text file.

Save - Saves the active planogram document. (more info [48](#))

Save As - Saves the existing planogram document under a new name.

Check for PlanoGraphics Update - Checks for new updates and alerts you to new program updates.

Make PDF - Lets you save the current planogram and any reports as a single PDF file. (more info [58](#))

Export - Allows you to take a "snap shot" of your planogram and save it as a TIFF, BMP or JPG file. (more info [58](#))

Document Setup - Allows you to change most of your planogram setup parameters after you have created a planogram document, including the planogram's width, height, peg hole or slat wall configuration and background type.

Print Setup - Allows you to change the printer used by PlanoGraphics and the printer's configuration.

Print - Prints the current planogram. (more info [58](#))

Exit - Quits the program.

2.3 Edit Menu

Undo	Ctrl+Z
Cut	Ctrl+X
Copy	Ctrl+C
Paste	Ctrl+V
Duplicate	Ctrl+D
Delete	Del
Copy Wall	Ctrl+W
Options	

Cut - Cuts the selected item in your planogram to the clip board.

Copy - Copies the selected item in your planogram to the clip board.

Paste - Pastes the item from the clip board to the planogram display.

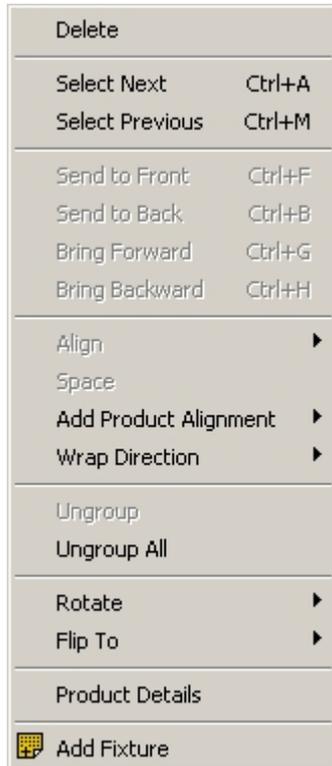
Duplicate - Duplicates the selected product in you planogram.

Delete - Deletes the selected product in you planogram.

Copy Wall - Copies the whole planogram to the clipboard, allowing to paste the whole planogram into another program.

Options - Lets you change program options like unit of measurement. (See Program Options section more info)

2.4 Product Menu



Delete - Deletes the selected item in your planogram.

Select Next - Selects the next item in your planogram. Items are selected in the order they were added.

Select Previous - Selects the previous item in your planogram. Items are selected in the order they were added.

Send to Front - Sends the selected item to the fore front of the planogram. This item will then cover any other items.

Send to Back - Sends the selected item to the back of the planogram. This item will then be covered by any other items.

Bring Forward - Moves the selected item forward one position in the stack order.

Bring Backward - Moves the selected item backward one position in the stack order.

Align - Aligns items that are part of a group to either the top or bottom edge. (more

info) [\[47\]](#)

Space - Spaces items that are part of a group. (more info) [\[47\]](#)

Add Product Alignment - allows you to control how the next product will be aligned when placed on your planogram. (more info) [\[43\]](#)

Wrap Direction - allows you to control where the next product will be placed on your planogram when you reach the end of a row of products. (more info) [\[43\]](#)

Ungroup - Ungroups items that are part of the selected product group.

Ungroup All - Ungroups all product groups in a planogram.

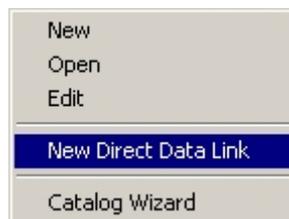
Rotate - Rotates the selected item in the planogram.

Flip To - Flips the selected item in your planogram to either the front, side or top. If a corresponding image is available it will be displayed otherwise a placement box is displayed. (more info) [\[32\]](#)

Product Details - Shows basic details of the selected item in your planogram. It also allows you to change the peg hook depth for the selected item. (more info) [\[48\]](#)

Add Fixture - Adds the fixture set to be added in the Selector under the Fixtures Tab. (more info) [\[16\]](#)

2.5 Catalog Menu



New - Creates a new product catalog in the Catalog Manager. (more info) [\[24\]](#)

Open - Opens an existing Product Catalog.

Edit - Opens the catalog used in the active planogram document.

New Direct Data Link - Creates a new link to an external data source which allows you to make planograms directly from your data source. (more info) [\[24\]](#)

Catalog Wizard - Starts the Catalog Wizard which guides you through the creation of a PlanoGraphics product catalog.

2.6 Reports Menu



Custom Report Writer - Opens the Custom Report Writer dialog box. (more info)^[54]

Reorder Alarm - Enables or Disables the Reorder Alarm. (more info)^[55]

Quick Reports - Open the Quick Reports report writer. (more info)^[54]

2.7 View Menu



Selector - Makes the Selector visible.

Picture Editor - If an item is selected in your planogram the original image file is opened in the Picture Editor otherwise the Picture Editor becomes visible without an image. (more info)^[34]

Catalog Manager - Makes the catalog manager visible. (more info)^[24]

Planogram Wizard - Starts the Planogram Wizard.

Catalog Wizard - Starts the Catalog Wizard.

Zoom - Allows you to set the zoom view of the planogram from 5% to 200% .

Windows - Allows you to arrange all open planogram documents in the program's work space.

Mode - Allows you to set the way products are displayed in your planogram. You can display product pictures or placement boxes. Placement box color options are available under this menu. (more info)^[49]

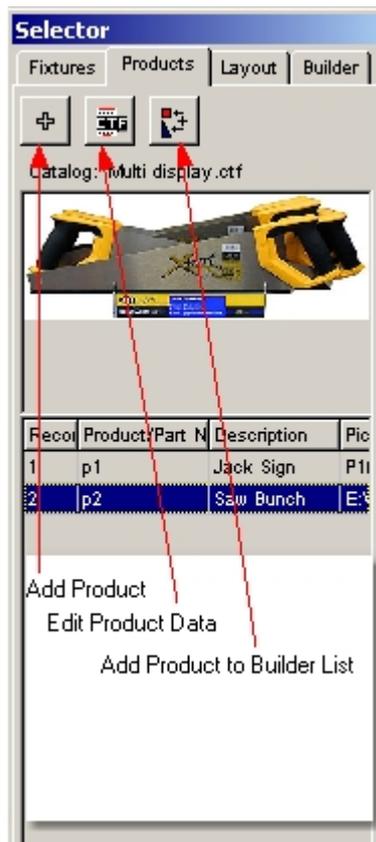
Tag - Enables Tags to be displayed with the products in your planogram. The tags display extra information about each product in your planogram. (more info) ⁴⁸

Product Transparency - Enables or disables background areas of product pictures to appear transparent when added to your planogram.

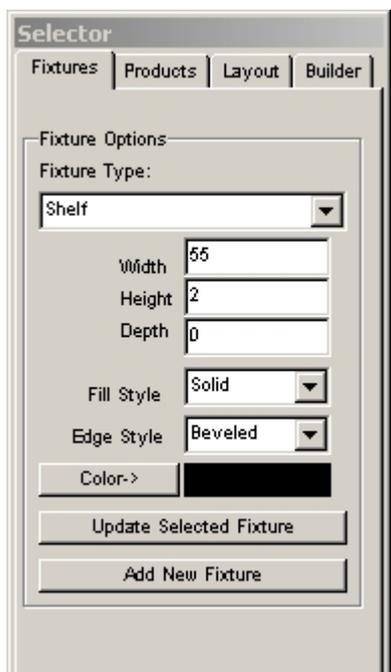
Open Document List - Selecting a document name brings the document to the top of the work area and makes the document the active document.

2.8 Selector

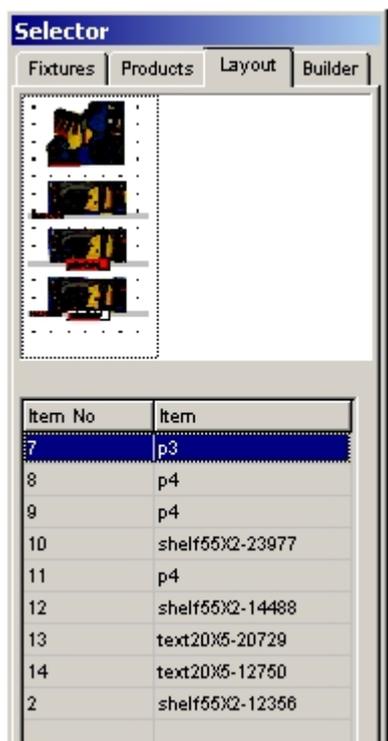
1) The Products Tab is used to find, preview and add products to your planogram or the Builder List.



2) The Fixture Tab is used to add new fixtures or to modify and existing fixture.



3) The Layout Tab shows you a thumbnail images of your complete planogram along with a list of all the items in your planogram.

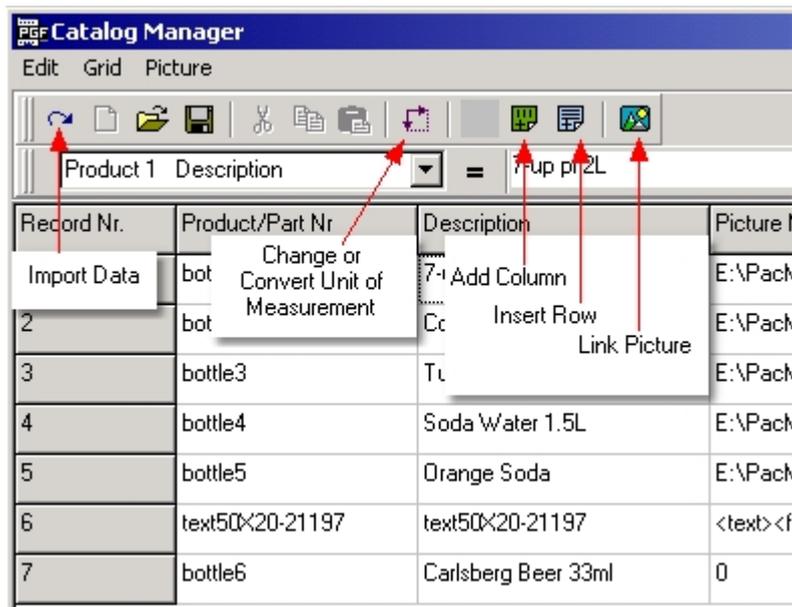


4) The Builder Tab lists all the items that will be added automatically to your planogram along with options on how the items should be ranked and added.

Item	Rank	Facings
p2	2	1
p3	3	1
p4	4	1

2.9 Catalog Manager

Use the Catalog Manager to create and manage PlanoGraphics catalog files or to manage direct data links that are linked to product databases created in other applications like Microsoft Excel, Microsoft Access and databases in SQL Servers.



2.10 File Menu Catalog Manager



New - Lets you create a new product catalog or new direct data link to an external database file.

Open - Opens a catalog file or the underlying database file that a direct data link points to.

Save - Saves changes to the active catalog file or saves direct data link property changes. Note, that changes made to data opened by a direct data link are saved immediately as you move away from the selected cell and not when the Save command is invoked. Changes to PlanoGraphics catalog files on the other hand are only saved when the Save command is invoked.

Save As - Saves catalog files or direct data link files under a new name.

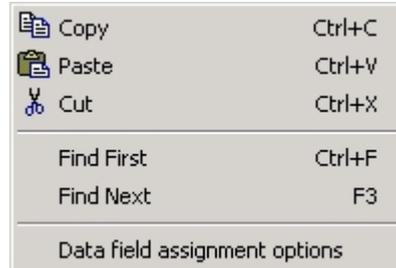
Import Text - Imports tab delimited text into the PlanoGraphics Catalog Manager. This command is not available for databases opened by a direct data link.

Import Excel - Imports an Excel file into the PlanoGraphics Catalog Manager. This command is not available for databases opened by a direct data link. This command is not available for databases opened by a direct data link.

Export - Exports a PlanoGraphics catalog file from the Catalog Manager to a tab delimited text file. This command is not available for databases opened by a direct data link.

Close - Closes the Catalog Manager.

2.11 Edit Menu Catalog Manager



Note: These commands are not available for databases opened by a direct data link except for the Data Field Assignment Options command.

Copy - Copies text from the selected cell to the clipboard.

Paste - Pastes text from the clipboard to the selected cell in the Catalog Manager.

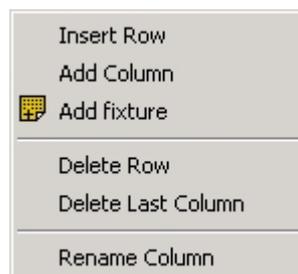
Cut - Cuts text from the selected cell to the clipboard.

Find First - Finds the first text in the Catalog Manager that matches the search text.

Find Next - Finds the next text in the Catalog Manager that matches the search text.

Unit of Measurements - Sets the units used to measure your products to inches or centimeters. It also allows you to convert all the measurements in your catalog between the two measurement standards.

2.12 Grid Menu Catalog Manager



Note: These commands are not available for databases opened by a direct data link.

Insert Row - Inserts a new row before the selected row. To append a new row at the end of the last row select any cell in the last row and push the return / enter key.

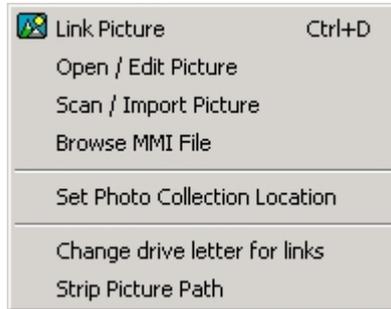
Add Column - Appends a new column to the last column in the catalog.

Delete Row - Deletes the selected row. To select a row select any cell in the row.

Delete Last Row - Deletes the last row and all data in the last row.

Rename Column - allows you to rename the selected column. To select a column select any cell in the column.

2.13 Picture Menu Catalog Manager



Link Picture - Allows you navigate to a product picture and link it to the selected product row. The pictures file name and location are then copied to the Picture Name column in your database or catalog file.

Open / Edit Picture - Opens the linked picture for the selected product row in the picture editor. If there is no linked picture or selected row the Open Picture dialog box allows you to select the picture to open in the Picture Editor.

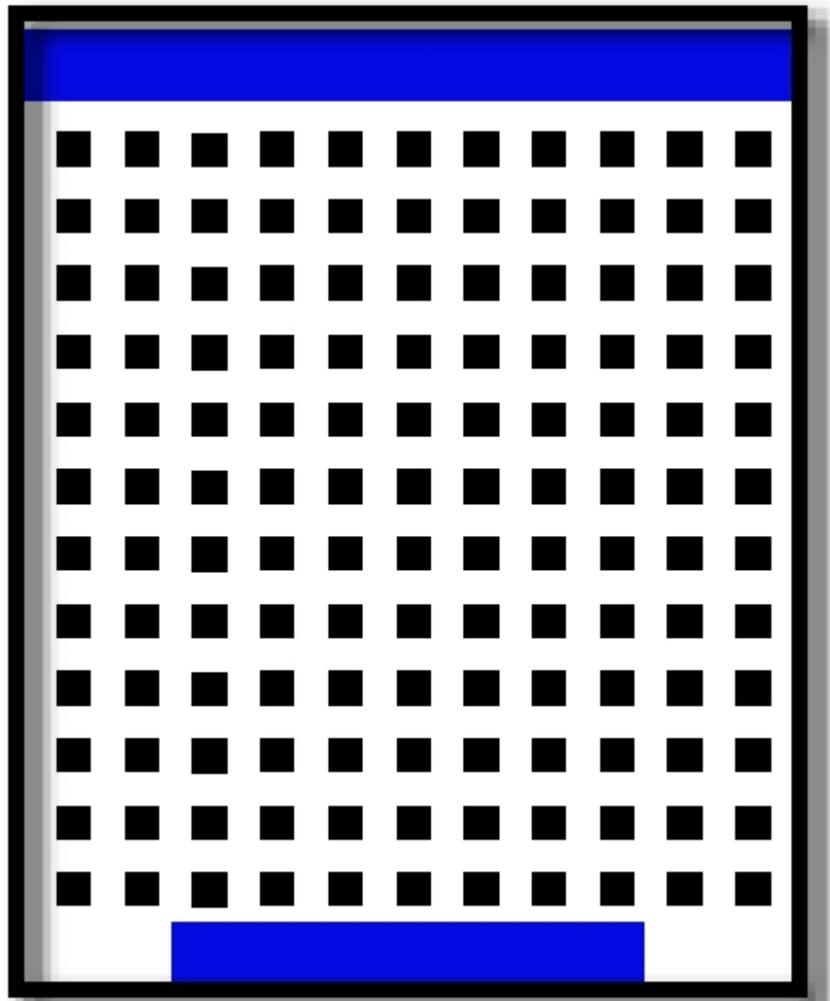
Scan / Import Picture - Allows you to import or scan and link a picture from any TWAIN compliant scanner or digital camera.

Set Photo Collection Location - Allows you to set a default photo location for your product photos. If the picture column in your catalog manager or database only contains a file name and no path information PlanoGraphics will look for the picture in the Photo Collection Location.

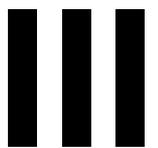
Change Drive Letter for Links - Changes the drive letter for any cells in the Picture Column that has file path or a drive letter.

Strip Picture Path - Removes any path information in all cells in the Picture Column leaving only the picture file name. When the path information is removed, PlanoGraphics will look for the picture in the Photo Collection Location.

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Part



Product Data

3 Product Data

3.1 Overview

Before you can start making planograms in PlanoGraphics you have to have access to product data. In PlanoGraphics you access product data in one of two ways:

1. Create a PlanoGraphics product catalog in the catalog manager.
2. Create a Direct Data Link to an external database or spreadsheet file.

The PlanoGraphics catalog file is a proprietary file format which can only be opened by PlanoGraphics.

A direct data link allows you to access your product data directly from an external data source. Linking to a data source is different than importing from an external data source in that importing data means you copy data from an external file into a new PlanoGraphics catalog file. Creating a Direct Data Link on the other hand never copies the data into a new file but rather reads the data directly from the source file every time you access the data. Using a direct data link eliminates the need to maintain your product data in two places, e.g. the data source and a PlanoGraphics catalog file and insures the product data in your planograms is always in sync with your product data in your data source. The types of external data sources that you can link to include Excel files, Access files, Microsoft SQL, MySQL, IBM System i, SAP or any database that can be accessed by ODBC or ADO . The way to make a direct data link varies slightly depending on the external data source type.

When should you use a PlanoGraphics Product Catalog and when should you use a Direct Data Link? We recommend using the PlanoGraphics Catalog File if any of the following points are true:

1. Your original data does not change very often.
2. The number of products in your database is under 1500 items.

Use a Direct Datalink if any of the following is true:

1. Your product data changes or is updated often.
2. The number of products in your database is over 1500 items.

Although there is no limit to the number of products you can have in a PlanoGraphics catalog file, this file format was designed for small to medium sized product databases. Therefore you may notice performance issues if you have more than 1500 items in a catalog file.

The Direct Data Link was designed for medium to large product databases. A Direct Data Link will deliver better performance with larger databases.

3.2 Making Catalogs

To make a product catalog you can have PlanoGraphics guide you through each step of the catalog making process by running the PlanoGraphics catalog wizard. To run the wizard just click on VIEW>>CATALOG WIZARD.

You can also create you catalogs manually without the help of the wizard. The rest of this section will deal with creating your catalogs manually.

To make a new catalog start PlanoGraphics, select CATALOG>>NEW.

The catalog manager works much like a spreadsheet program. You are presented with rows, columns and cells. Each row can be thought of as a product entry. Each column can be thought of as a product attribute describing something about the product entry. Each cell contains the attribute information for a product.

When you create a new catalog document the catalog manager opens with 12 suggested default attributes. You can have virtually an unlimited number of attributes and a minimum of 3 attributes. You can add or remove product attributes by clicking on GRID>>ADD COLUMN (to add an attribute) or GRID>>REMOVE COLUMN (to remove a column) The 3 required attributes are **Product/Part Nr, Width and Height**, where Product/Part Nr is any unique name or part number that identifies the product. It is important that Product/Part Nr is unique for each product entry. Width and Height are the measurements of the product in either centimeters or inches. You can enter measurements up to the nearest 0.25 cm / 0.1 inch (i.e. 2.25cm, 2.75cm, 1.2", 1.4", etc.). It is very important that you select the correct unit of measurement before you start to make your catalog. If you do not your pictures and the amount of space they take up on your display will not appear as you intended them to when you make your display. You can change the unit of measurement for your catalog items or convert the measurements of your items between centimeters and inches or visa versa by clicking on EDIT>>UNIT OF MEASUREMENT. The unit of measurement option for your catalog is independent from planogram unit of measurement setting under EDIT>>OPTIONS>>UNIT OF MEASUREMENT.

The rest of the suggested attributes are optional and described as follows:

Record Nr- this is the order in which the record appears in the catalog manager. This attribute is assigned automatically for you whenever you save a catalog and you can not edit this value.

Description - This can be any text description about the product or product entry.

Picture Name - This is the picture file name of the product. Pictures are not stored directly in your catalog file but rather a reference or link of where the picture file is located. The picture name attribute can contain a full path and file name or just the file name. If only the picture name is used then PlanoGraphics will look for the picture in the catalog file's directory or in the Photo Collection Location setting (PICTURE>>SET PHOTO COLLECTION LOCATION). Long file names are allowed. The picture name cell can contain up to 255 characters. You can enter the product picture name and file path information manually or you can use the PICTURE>>LINK PICTURE to browse, preview and link product picture files to your catalog items. Please see the section on Product Photos for more details.

PegX and PegY - These attributes indicate the location of the peg hole on the product packaging. If these attributes are filled in and the align to peg option is selected in EDIT>>OPTIONS and pegboard is selected as your background then PlanoGraphics will align the product's peg hole to the nearest peg hole on the display wall when you add products to your display or move them around. If these attributes are left blank or set to 0 then the products will not be aligned and are placed exactly where you move them. To set the PegX and PegY attributes measure from the left corner of the packaging to the center of the peg hole for the PegX value. The PegY value is measured from the bottom of the packaging to the center of the peg hole. When adding products when align to peg is enabled and starting a new row of products, you need to manually move the first product to the desired starting peg position. Once this is done additional products added to that row will be added to and correctly aligned to the next peg position.

Category - This can be any text description to place the product in a certain category. This information can then be displayed in your planograms using the TAGs feature or is used to generate automatic colors for product placement boxes.

Brand - This can be any text description to place the product in a certain brand category. This information can then be displayed in your planograms using the TAGs feature or is used to generate automatic colors for product placement boxes.

3.3 Adding Products to your Catalog

To fill out the cells in the catalog manager you can click inside any cell or the cell inspector and type in information about your product. To navigate to cells within a row use the tab key to move right.

To add another product just click on the ADD ROW button or GRID>>ADD ROW. A new row is also automatically added when the last row is selected and the return key is pushed or if the last cell in the last row is selected tab key is pushed.

3.4 Importing Data

In many cases you will have some or all of your product information already available in a spreadsheet or database. Instead of having to re-enter all this information by hand in the PlanoGraphics catalog manager you can import the data from your preexisting spreadsheet or database in the form of a tab delimited text file or Excel file*.

Unlike other planogramming software, PlanoGraphics does not require you to arrange your data source's columns to match those of PlanoGraphics default columns. Instead PlanoGraphics uses the exact same column arrangement as your imported data.

After you have imported your data by clicking on FILE>>IMPORT TEXT or FILE>>IMPORT EXCEL, you map the columns in your imported data to the different types of required catalog information, such as Part No, Width, Height and Picture Name by clicking on EDIT>> DATA FIELD ASSIGNMENT OPTIONS. In the data field assignment options dialog, you will find the column names from your imported data listed in the drop down lists to the right. For each "Information type" find the matching column name from the corresponding list of column names from your imported data.

Information type	Catalog Column Names
Unique identification for product:	Product/Part Nr
Product description:	Description
Picture file name:	Picture Name
Width:	Width
Height:	Height
Depth:	Depth
Cost price:	Cost Price
Retail price:	Retail Price
Peg hole X coordinate:	Peg X
Peg hole Y coordinate:	Peg Y
Inventory:	None
Low inventory alarm amount:	None
Sales quantity:	None
Category:	Category
Brand:	Brand

If you are importing from a text file you will have to add a "dummy column" as the last column in your data source. The "dummy column" has to be filled with "0"s and has to be the last column. The dummy column is not imported into the catalog manager.

3.5 Creating a Direct Data Link to an SQL Server

Overview

Creating a Direct Data Link to an SQL Server file requires the following steps:

- 1) Create an SQL Server Database with your product data in Microsoft SQL Server.
- 2) Create a Direct Data Link file in PlanoGraphics.

Details on how to do these four steps are as follows:

Create an SQL Server Database with your product data

in single table, for example Tabel1. Data for the column containing picture links can be added in later in the PlanoGraphics Catalog Manager.

Create a Direct Data Link file in PlanoGraphics

Open the Catalog Manager by clicking on VIEW >> CATALOG MANAGER

Create a new Data Link by clicking on NEW >> DIRECT DATA LINK

Browse to the location where you would like to save your Data Link file, for example the catalog sub directory in the PlanoGraphics install directory when the Save direct data link dialog box appears.

Select the "Microsoft OLE DB Provider for SQL Server" under the Provider tab in the Data Links Property dialog box then click the NEXT button.

Under the Connection Tab fill in the connection information. Click on OK.

Next you will be asked for the name of the Tabel in your database.

When the Catalog Options dialog appears, match up the column names in your database with the correct data type.

The catalog manager will now attempt to connect to your data source. If it is successful all the rows from your data source will appear in the catalog manager.

Using a Direct Data Link in the Catalog Manager

When working with data provided by a data link in the Catalog Manager you should be aware of the following:

You can edit cells.

New columns can not be added nor can existing columns be renamed.

Changes made to your data in the catalog manager are written back to the data source immediately as soon as you are done editing a cell and move to a new cell. If you change a cells content and then want to revert to the original content press the Esc key before you move to a new cell.

Menu items under the Grid menu item are not available.

Table

3.6 Creating a Direct Data Link to an Access file

Overview

Creating a Direct Data Link to an Access file requires the following steps:

- 1) Create an Access file with your product data in Microsoft Access.
- 2) Create an ODBC System Data Source Name (DSN) pointing to your Access file.
- 3) Create a Direct Data Link file in PlanoGraphics.

Details on how to do these four steps are as follows:

Create an Access file with your product data

in single table, for example Tabel1. Data for the column containing picture links can be added in later in the PlanoGraphics Catalog Manager.

Create an ODBC System Data Source Name (DSN) pointing to your Access file.

From the Control Panel, open the ODBC Administrator.

On the System DSN tab, click Add.

Select Microsoft Access Driver (*.mdb) and click Finish. If this option does not exist, you need to install the Microsoft ODBC driver for Access from Access setup.

Choose any name you would like for the Data Source Name.

Make sure the Version is set to the correct version of Access.

Click "Select File...", browse to your Access file, and click OK.

Click OK and then click OK again.

Set permissions for your Access file. This step may not be needed if the Access file is located locally on your computer.

Create a Direct Data Link file in PlanoGraphics

Open the Catalog Manager by clicking on VIEW >> CATALOG MANAGER

Create a new Data Link by clicking on NEW >> DIRECT DATA LINK

Browse to the location where you would like to save your Data Link file, for example the catalog sub directory in the PlanoGraphics install directory when the Save direct data link dialog box appears.

Select the "Microsoft OLE DB Provider for ODBC Drivers" under the Provider tab in the Data Links Property dialog box then click the NEXT button.

Under the Connection Tab select the "Use Data Name" option and then your data source in the drop down list. This data source name is the one you gave your Access file connection name under "Create an ODBC System Data Source Name (DSN) pointing to your Access file".

Click on OK.

Next you will be asked for the name of the table in your database.

When the Catalog Options dialog appears, match up the column names in your database with the correct data type.

The catalog manager will now attempt to connect to your data source. If it is successful all the rows from your data source will appear in the catalog manager.

Using a Direct Data Link in the Catalog Manager

When working with data provided by a data link in the Catalog Manager you should be aware of the following:

You can edit cells.

New columns can not be added nor can existing columns be renamed.

Changes made to your data in the catalog manager are written back to the data source immediately as soon as you are done editing a cell and move to a new cell. If you change a cells content and then want to revert to the original content press the Esc key before you move to a new cell.

Menu items under the Grid menu item are not available.

3.7 Create a Direct Data Link to an Excel file

Overview

Creating a Direct Data Link to an Excel file requires the following steps:

- 1) Create an Excel file with your product data in Excel.
- 2) Create a Named Range in your Excel file.
- 3) Create an ODBC System Data Source Name (DSN) pointing to your Excel file.
- 4) Create a Direct Data Link file in PlanoGraphics.

Details on how to do these four steps are as follows:

Create an Excel file with your product data

in single worksheet, for example sheet1. Data for the column containing picture links can be added in later in the PlanoGraphics Catalog Manager.

NOTE : If a column in your Excel spreadsheet contains both text and numbers PlanoGraphics cannot correctly interpret which data type the column should be. Please make sure that all the cells in a column are of the same data type. The following three errors can occur if each cell in a column is not of the same type or you have the types mixed between "text" and "general":

Microsoft OLE DB Provider for ODBC Drivers error '80040e21'

The request properties can not be supported by this ODBC Driver.
Microsoft OLE DB Provider for ODBC Drivers error '80004005'

The query is not updateable because it contains no searchable columns to use as a hopeful key.

Microsoft OLE DB Provider for ODBC Drivers error '80004005'

Query based update failed. The row to update could not be found.

Create a Named Range

for example, myRange1, in your spreadsheet:

Highlight the row(s) and column(s) area where your data resides.

On the Insert menu, point to Name, and click Define.

Enter the name myRange1 for the Named Range name.

Click OK.

NOTE : PlanoGraphics assumes that the first row in an Excel query contains the column headings. Therefore, the Named Range must include the column headings.

NOTE : Column headings cannot be a number. PlanoGraphics cannot interpret them and, instead, returns a cell reference. For example, a column heading of "F1" would be misinterpreted.

Create an ODBC System Data Source Name (DSN) pointing to your Excel file.

From the Control Panel, open the ODBC Administrator.

On the System DSN tab, click Add.

Select Microsoft Excel Driver (*.xls) and click Finish. If this option does not exist, you need to install the Microsoft ODBC driver for Excel from Excel setup.

Choose any name you would like for the Data Source Name.

Make sure the Version is set to the correct version of Excel.

Click "Select Workbook...", browse to your Excel file, and click OK.

Click the "Options>>" button and clear the "Read Only" check box.

Click OK and then click OK again.

Set permissions for the your Excel file. This step is not needed if the Excel file is located locally on your computer.

NOTE : If you do not set the appropriate permissions on the spreadsheet, you get an error message similar to the following:

Microsoft OLE DB Provider for ODBC Drivers error '80004005'

[Microsoft][ODBC Excel Driver] The Microsoft Jet database engine cannot open the file '(unknown)'. It is already opened exclusively by another user, or you need permission to view its data.

Create a Direct Data Link file in PlanoGraphics

Open the Catalog Manager by clicking on VIEW >> CATALOG MANAGER

Create a new Data Link by clicking on NEW >> DIRECT DATA LINK

Browse to the location where you would like to save your Data Link file, for example the catalog sub directory in the PlanoGraphics install directory when the Save direct data link dialog box appears.

Select the "Microsoft OLE DB Provider for ODBC Drivers" under the Provider tab in the Data Links Property dialog box then click the NEXT button.

Under the Connection Tab select the "Use Data Name" option and then your data source in the drop down list. This data source name is the one you gave your Excel file connection name under "Create an ODBC System Data Source Name (DSN) pointing to your Excel file".

Click on OK.

Next you will be asked for the name of the Table in your database. Enter the name of the Range you created under "Create a Named Range"

When the Catalog Options dialog appears, match up the column names in your database with the correct data type.

The catalog manager will now attempt to connect to your data source. If it is successful all the

rows from your data source will appear in the catalog manager.

Using a Direct Data Link in the Catalog Manager

When working with data provided by a data link in the Catalog Manager you should be aware of the following:

You can edit cells.

New columns can not be added nor can existing columns be renamed.

Changes made to your data in the catalog manager are written back to the data source immediately as soon as you are done editing a cell and move to a new cell. If you change a cell's content and then want to revert to the original content press the Esc key before you move to a new cell.

Menu items under the Grid menu item are not available.

3.8 Linking Product Photos

To have pictures of your products appear in your planograms you have to have a column in your catalog that tells which picture it should use for each product and where to find it. If you did not import your data from an external data source this column is already provided for you and is called Picture Name. If you do not provide a picture name in your catalog placement blocks will appear in your planograms instead of pictures.

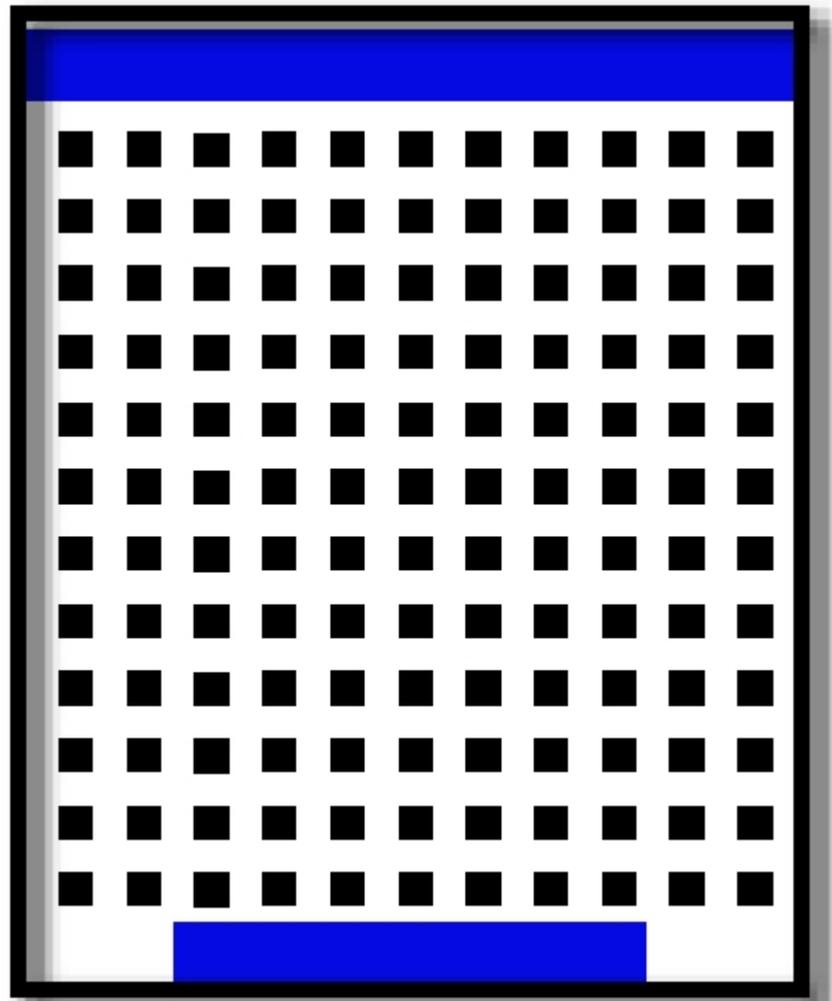
To assign a picture to a catalog item click on PICTURE>>LINK PICTURE. When you select a picture the name of the picture and the file path information will be added to the picture column automatically.

PlanoGraphics allows you to have multiple image sides per catalog or database item. These images can be in any of the supported file formats. When linking to product images, you must always link to the image showing the front side of the product. To have corresponding side or top image name the side or top image the same as the front image except precede the image file name with "side-" for the side image and "top-" for the top image. All three images must be located in the same folder and must be of the same file type. For example, to have images available for all three sides you would have to have the following files located in the same folder:

MyImage.jpg
side-MyImage.jpg
top-MyImage.jpg

When the Flip feature is used, PlanoGraphics will automatically use the item image with the corresponding side.

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Part

IV

Editing Product Photos

4 Editing Product Photos

4.1 Overview

PlanoGraphics does not require you to preprocess images before using them in your planogram displays.

You may still however want to edit your product pictures to get better looking results or to get better program performance. PlanoGraphics comes with a picture editor that allows you to do the following:

Cropping

Background removal / Adding Transparent Backgrounds

Picture Optimization

Scanning Pictures

To open the Picture Editor while in the main window of PlanoGraphics click on VIEW >> PICTURE EDITOR.

To edit a picture while in the Catalog Manager, select any cell in the row where your product is and then click on PICTURE>>EDIT/OPEN PICTURE.

4.2 Cropping

Cropping is the process of cutting out excess picture area around your product. To crop, click on the CROP TOOL, then click on the picture where you want the crop to start. While holding down the mouse button, drag the mouse across the area of the picture that you want to keep. As you move the mouse you will see a crop box drawn across the image. When the crop box contains the area of the picture you want to keep, release the mouse button. The areas of the image that were not in the crop box will be removed. If the crop results are not satisfactory just click on EDIT>>UNDO to restore the image.

4.3 Background removal / Adding Transparent Backgrounds

For products that are non-rectangular and where it is important to see through areas that can not be cropped away, you can designate background areas of the image to be transparent.

1) To start this process click on the Dot Button  (3rd button from the top, on the left). This changes the cursor to "Draw Dots Mode". Once in Draw Dots Mode you draw dots all around the item in the picture.

2a) If your item is made up of mostly straight lines and sharp corners and edges then place dots sparingly at each corner or edge and then connect the dots with the Connect with Straight Lines command button .

2b) If the item you need to trace is made up of curved lines you need to follow the curves with closely spaced dots and then connect the dots with the Connect with Curved lines button. When tracing a curved line you get the best results by placing one dot at the start of the curve, one or more dots in the curve making sure to place a dot at the mid point of the curve and then a dot at the end of the curve. After you have connected the dots with curved lines using the Straight

Lines command button  you can move the dots for fine adjustment of the outline line to get it to fit as closely to the item as possible.

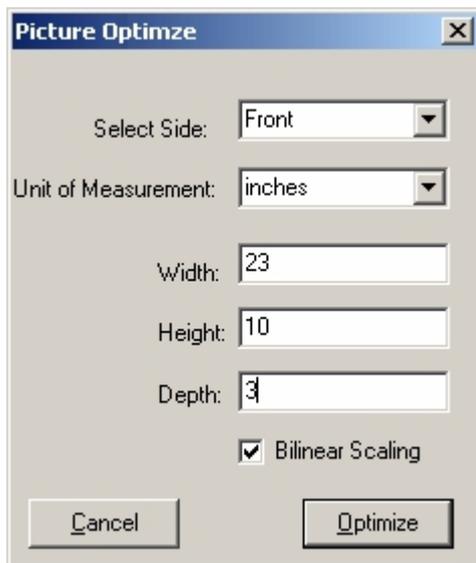
3) Then to remove the background click on the Remove Background button . This will fill the background with your selected background color (EDIT>>TRANSPARENCY COLOR), which will be transparent, when you use the picture to build your displays.

4.4 Picture Optimization

Picture optimization scales your picture to the optimal picture size and resolution for screen display and printing from PlanoGraphics. Picture Optimization employs bilinear scaling, which can provide better picture quality than the faster yet lower quality scaling techniques used when using non-optimized pictures in your planograms. In addition, since pictures are pre-scaled after being optimized, program performance can be greatly increased.

To optimize a picture:

- 1) Start the Picture Editor by clicking on VIEW >> PICTURE EDITOR in the main menu.
- 2) Load a picture in the Picture Editor by clicking on FILE >> OPEN in the picture editor's menu.
- 3) Select PICTURE >> OPTIMIZE SIZE in the picture editor's menu.
- 4) Enter the product side, unit of measurement, width, height, depth (depth needed only when top or side is selected for product side) and the bilinear scaling option and then select optimize.



3) If the results are Ok save the picture (FILE >> SAVE).

NOTES: For correct results the image must be cropped and any background removal must be done before optimizing the picture size. When you save the optimized image your original image will be overwritten. Therefore it is highly recommended that you keep a copy of the original image since optimizing an image for PlanoGraphics will, in most cases reduce the image size.

4.5 Color Modes

Picture files can describe color using different color modes or models. The most common color mode for computers is called RGB mode. Other color modes include CMYK mode and Index Color mode. PlanoGraphics supports files saved in RGB and Index color modes and CMYK for selected file formats. See the section "Supported File Formats" for more information on supported color modes.

4.6 Scanning and Importing Images

You can scan or import images from any TWAIN compliant scanner or digital camera in the picture editor. Select FILE>>SCAN. You may need to select your TWAIN source if it is the first time you are using your scanner or digital camera or if you have multiple TWAIN devices installed. To scan open the picture editor (from the main menu VIEW>>PICTURE EDITOR, from the catalog manager PICTURE>>OPEN / EDIT PICTURE) and select FILE>>SCAN / IMPORT. When scanning or taking digital pictures you usually can choose the resolution and color modes. For color modes always pick RGB or RGB 24bit. The resolution depends on the size of your product. PlanoGraphics does not require super high resolution pictures and usually works better with lower resolution images. As a general rule you can set the resolution using the following formulas.

MEASUREMENT OF PRODUCT IN CM x 8 = number of pixels

MEASUREMENT OF PRODUCT IN INCHES x 25= number of pixels

So a product that is 10 x 10 inches should be scanned in or imported at around 250 pixels x 250 pixels. A product that is 10 x 10 cm should be scanned in or imported at around 80 pixels x 80 pixels.

4.7 Supported Product Picture File Formats

·Standard Windows bitmap images (*.bmp, *.rle, *.dib),

- • byte order: little endian
- • sample sizes: 1, 4, 8 bits per sample
- • color spaces: indexed, RGB(A)
- • compression formats: uncompressed, RLE

·JPEG images (*.jpg), Baseline, Progressive

- • byte order: little endian
- • sample sizes: 8 bits per sample
- • color spaces: grayscale, RGB

TIFF images (*.tif; *.tiff), extended base line implementation

- • byte orders: little endian, big endian
- • sample sizes: 1, 2, 4, 8, 16 bits per sample
- • color spaces: indexed, grayscale, RGB(A), L*a*b*
- • compression formats: uncompressed, packed bits, LZW, CCITT T.4 (raw and modified fax group 3, possibly word aligned), ThunderScan, Deflate, new style JPEG

·EPS images (*.eps, *.epsf,), with TIFF preview only.

- • Bitmap data: ASCII and binary
- • color spaces: grayscale, RGB

·Photoshop images (*.psd, *.pdd)

- • byte order: big endian

- • sample sizes: 1, 8, 16 bits per sample
- • color spaces: indexed, RGB, CMYK, CIE L*a*b*
- • compression formats: uncompressed, packed bits
- • special:
- • duo tone

•Paintshop Pro images (*.psp)

- • byte order: little endian
- • sample sizes: 1, 4, 8 bits per sample
- • color spaces: indexed, gray scale, RGB
- • compression formats: uncompressed, LZ77

•Portable network graphic images (*.png)

- • byte order: big endian
- • sample sizes: 1, 2, 4, 8, 16 bits per sample
- • color spaces: indexed, grayscale (alpha), RGB(A)
- • compression format: LZ77
- • specials:
- • supported chunks: IHDR, IDAT, IEND, PLTE, gAMA, tRNS, bKGD
- • transparency support partially for RGB, which is stored as 32 bits format

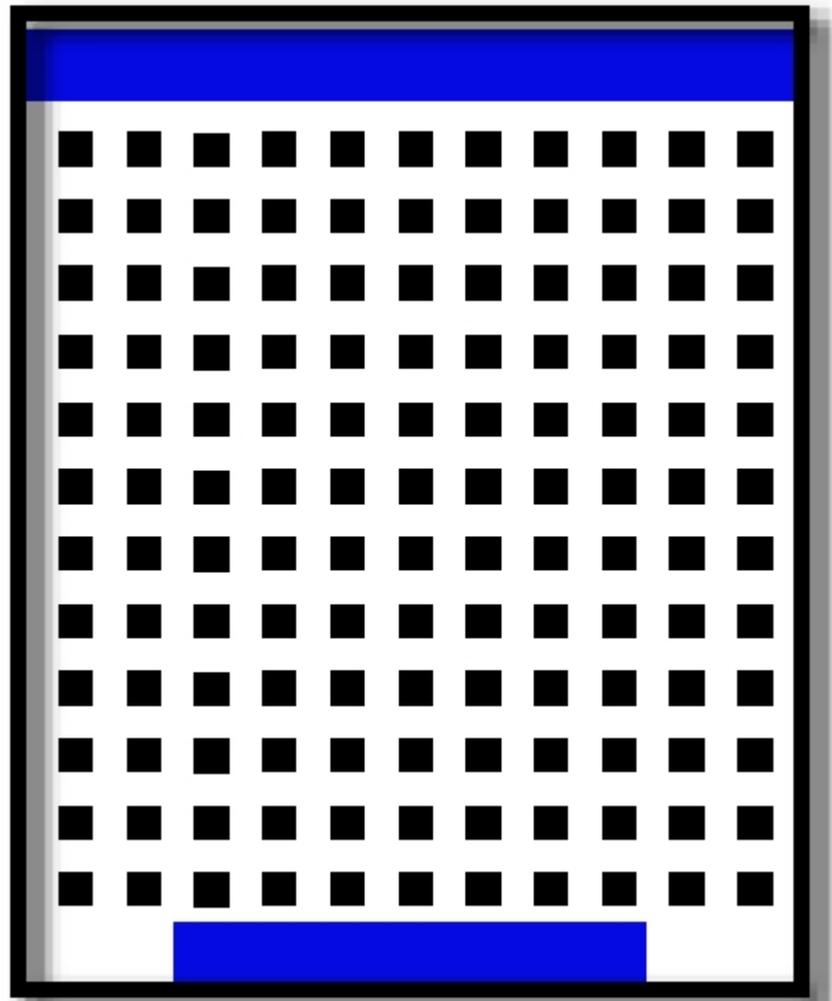
Mediatronic Multiple Image format (*.mmi),

- • byte order: little endian
- • sample sizes: 8 bits per sample
- multiple sub images

4.8 Mediatronic Multiple Image format (*.mmi)

To better manage and keep track of a catalog's collection of pictures you can have the catalog manager copy all the picture files linked to your catalog to a single file called a Mediatronic Multiple Image file. This file has an extension of ".mmi". This allows you to keep all the pictures for a given catalog grouped together in a single file which helps prevent files from getting lost and makes it easier when you have share a complete photo collection with someone else. Since the linked picture files are only copied to a single file, your original files stay are not moved or otherwise altered. Pictures in a MMI file can not be edited and you can not add or remove single images once the MMI file is created. This helps prevent your pictures form being inadvertently changed or altered by someone who is only using PlanoGraphics to build planograms and not catalogs. To make an MMI file, open a catalog in the catalog manager. Then click FILE>>SAVE>>SAVE ALL PICTURES IN A SINGLE FILE. After the MMI file has been made you will get a short summary of the files copied and then you will be asked if you would like to change and update your catalog so that it uses the pictures in the MMI file instead of the original files. Note that the Multiple Image File works only on the Windows version of PlanoGraphics. If you plan to share your photo collection with Macintosh users you can not use this option.

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Part

V

Making Planograms

5 Making Planograms

5.1 Setting Up Your Planogram

After you have made your catalog and linked your pictures to the catalog you are ready to make your planograms. The easiest way to start making a planogram is to run the planogram wizard by clicking on VIEW>>PLANOGRAM WIZARD. The planogram wizard will guide you through the process of setting up your planogram display options. The rest of this section will explain the different display options and how to set these options manually without the help of the planogram wizard.

Clicking on FILE>>NEW will present you with the following display options;

Wall width- Width of the display in the currently selected unit of measurement. You can select from preset measurements or select a custom measurement. To change preset values just click on the number and type a new value.

Wall Height- Height of the display in the currently selected unit of measurement. You can select from preset measurements or select a custom measurement. To change preset values just click on the number and type a new value.

Wall Backgrounds:

Pegboard – when the pegboard background is used peg holes are drawn to the display background and products that have defined pegboard hanger holes (Peg X and Peg Y values greater than 0 in the product catalog) will be aligned to the nearest pegboard whenever they are added to a display or moved in the display.

Solid – solid is a background with a solid colored background. The color can be changed by clicking on the background color button.

Slatwall - when the Slatwall background is used horizontal slats are drawn on the display background and products that have defined pegboard hanger holes (Peg X and Peg Y values greater than 0 in the product catalog) will be aligned to the nearest slat whenever they are added to a display or moved in the display.

Image – the image background option allows you to make a composite picture of a display area. By combining a picture of a store display area or shelf as the background and photos of the items in your catalog you can create a photo realistic snapshot of any display area. See the section on "Using Images as Backgrounds" for more information.

Product Catalog - Select a catalog that you want use for your planogram. The default location for your catalogs and pictures is in the Catalogs sub directory where you installed PlanoGraphics. If the default location is not where you want to store your catalogs you can use the Find Catalog button to set a new location for your catalogs. This new location will be the location that is displayed in the Product Catalogs list box whenever you create a new planogram and it is also the location PlanoGraphics will look for a catalog file whenever you open a PlanoGraphics display file.

First peg from top and bottom - The distance from the top edge of your display wall where the first row of peg holes starts

First peg from the left and right - The distance from the left or right edge of your display wall where the first and last peg hole columns start.

Vertical peg space - This is the space between each peg hole on each row.

Horizontal peg space - This is the space between each peg hole on each column.

Peg hole size - This is the diameter of the peg hole on your display wall.

Clicking on "OK" will create a blank wall display based on your these settings. The next step is to start adding products to your display.

5.2 Using Images as Backgrounds

Making simulated in-store photos of your products is a snap in PlanoGraphics. To increase the realism of a simulated in-store photo using the image background feature it is important to follow some simple guidelines when taking your background pictures and when setting up a new PlanoGraphics document.

- 1) Compose items in the background picture using the same angle as your product pictures.
- 2) Use some existing items in you picture area or place items like tape markers in the actual physical picture area that can be used later as crop marks, two horizontal and two vertical. In these examples we could use the display itself as for the crop marks or we could use some chairs if we wanted to include some more of the display background.
- 3) With a ruler or tape measure, the physical distance before taking the picture between the horizontal crop marks and write it down. Repeat this for the vertical crop marks. In this example the width between the chair arms that serve as our horizontal crop marks measured out to 50cm and the height of the display which serves as our vertical crop marks measures out to 137cm.
- 4) Take the picture of your display area making sure the crop marks are included in the picture.
- 5) In the picture editor or another photo editing program crop the image at the crop marks in the picture.
- 6) Save the file. Include the actual physical measurements you wrote down earlier as the first part of the file name in the format "WidthxHeight DISPLAY NAME.ext". In this example the file name was saved as "50x137 Multi Display.jpg". When you save your file this way PlanoGraphics will automatically extract the measurements from the file name when you select the image in the Document Setup dialog box and place the measurements in the custom width and height settings.
- 7) Create a new document in PlanoGraphics.
- 8) Select Image as the background type.
- 9) Select the image you just saved, when prompted. Your display measurements will automatically be set if you followed the naming convention in step 6, otherwise select your measurements manually.
- 11) Start adding products from one of your catalogs.

5.3 Navigating Product Data with the Catalog Browser

The catalog browser is located below the main menu. To navigate through your product data use the browser buttons.

 navigates to the first item in the catalog

 navigates to the previous item in the catalog

 adds the currently selected product in the product browser to your display

 navigates to the next item in your catalog

 navigates to the last item in your catalog

 Searches the Part No attribute of the product data for a match.

5.4 Using the Selector

The selector gives you a quick, organized overview of your catalog items, display layout, fixture items and automated planogram builder options. The selector organizes the different information in lists and presents them under three categories. The selector has four tabbed lists called PRODUCTS, FIXTURES, LAYOUT and BUILDER

PRODUCTS – lists all the products in your catalog in a small grid much like the catalog manager. Above the grid is a product preview display for the selected catalog. You can drag and drop the picture onto your display area to add the product. If a product picture can not be found or has not been linked yet you can still add the item to your display. A colored placement box will be added to your display showing you how much space the product will take up. Above the product preview picture area, there are three small buttons. The button left to right add the selected product, opens the catalog in the catalog manager, adds the product to the planogram builder list.

FIXTURES- From this tab you can add or modify any kind of fixture to your planogram by selecting the fixture type, filling in the size, selecting any extra attributes and then clicking in Add Fixture. To modify a selected fixture just change any of the values displayed. The fixture is immediately updated. Changes to width, height or depth must be confirmed by pressing the return key.

LAYOUT- lists of all the items that you have added to your display. Above the list is a preview picture area that show a your complete display layout.

BUILDER – Displays planogram builder items and options. See the section "Automated Planogramming^[43]" for more details.

5.5 Manual Planogramming

To add items manually to your display you find the item you want in the Catalog Browser or Selector and click on the + BUTTON or click on the product picture in the selector and drag and drop it onto the display area .

When you add an item to your display it becomes the "selected item" in your display and this is designated by a "focus rectangle" being drawn around the item. If you leave this item selected

and then add another item to your display PlanoGraphics will add the new item to the next available peg to the right of the product on the same peg row if the PegX and PegY attributes are filled in on the newly added item. If they are not filled in then the new item will be added on the right hand side and as closely as possible to the selected item. As soon as the new item is added to the display it becomes the "selected item". You can continue this process to quickly add a whole row of nicely aligned and evenly spaced items to your display. When the row of items you add reaches the end of the display wall PlanoGraphics will wrap up or down and around to start a new row of products depending on the Wrap Direction setting.

If you don't want PlanoGraphics to align items like this then just deselect your selected item by clicking any place on the wall display where there is no product, and then add the new item. When there is no selected item and you add a new item, the new item is always placed in the upper left corner of your display and it is not aligned to any peg holes when first added.

5.6 Wrap Direction

The Wrap Direction command allows you to control where the next product will be placed on your planogram when you reach the end of a row of products. To set the Wrap Direction click on PRODUCT >> WRAP DIRECTION and then one of the following:

Automatic - If the item being added has an X position and Y position peg hole defined in its product database the item will wrap down. Otherwise it will wrap up.

Up - Overrides the Automatic wrapping and always wraps up when you reach the end of a product row.

Down - Overrides the Automatic wrapping and always wraps down when you reach the end of a product row.

5.7 Add Product Alignment

The Add Product Alignment command allows you to control how the next product will be aligned when placed on your planogram. To set the Wrap Direction click on PRODUCT >> ADD PRODUCT ALIGNMENT and then one of the following:

Automatic - If the item being added has an X position and Y position peg hole defined in its product database the item is aligned to the top edge of the previously added item. Otherwise the item is aligned to the bottom edge of the previously added item.

Up - Overrides the Automatic alignment and the item is aligned to the top edge of the previously added item.

Down - Overrides the Automatic alignment and the item is aligned to the bottom edge of the previously added item.

5.8 Loading Product Lists & Automated Planogramming

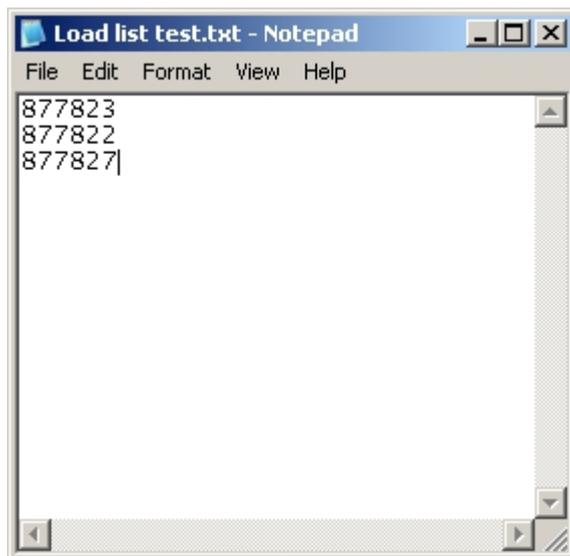
Automated planogramming with PlanoGraphics Builder Feature allows you to quickly try out different planogram display configurations based on placement criteria you select. PlanoGraphics analyzes information about the products you want in your planogram, ranks them based on this information and automatically builds a complete planogram in a matter of seconds, optimizing product placement to match your placement criteria.

Building automated planograms is a three step process using the Load Product List command in the main menu .

- 1) Create a new planogram by selecting FILE >> NEW in the main menu.
- 2) Select FILE >> LOAD PRODUCT LIST in the main menu and select a text file that contains a list of products .
- 3) Paste or load a text file to the product list or enter the product numbers manually to the product list. Set the Load Product List Options. These options let you tell PlanoGraphics how many products should be added for each product listed in the product list. After setting the options select OK.



NOTES: The text file containing the product list can be created in Notepad (in Windows XP select START >> PROGRAMS >> ACCESSORIES >> NOTEPAD). The text file should contain only the product part number. Each product number should be on its own line in the text file. Each time you load a product list from a text file any existing products that may be in your planogram are deleted before a new planogram is built based on the product list.



After the planogram is created you can manually adjust the position of products in your planogram or you can have the whole planogram automatically rebuilt by changing the Ranking Options (discussed in more detail below) or other options under the Builder Tab in the Selector and then clicking on the Build Display button. You do not need to reload the product list text file.



You can also manually add products to the builder list. This is a six-step process using the Selector.

- 1) Create a new planogram by selecting FILE >> NEW in the main menu.
- 2) Select or load the products you want to have in your planogram.

Click on the PRODUCTS tab on the selector, select a product and then click on the "Add to Builder list" button (furthest button to the right).

Or click on the BUILDER tab on the selector, browse to a product in the catalog browser and click on the "Add to Builder List" button (first button to left).

- 3) Set the builder placement option.

Select the BUILDER tab, then select one of the items in the Placement Options drop down list. The different placement options include;

Manual Ranking - Adds products to your display in the same order as they appear in the Builder List

Least Space, Most Profit – Finds the products in the builder list that take up the least space and have the greatest profit margin and places these items in the most visible part of your display.

Most Space, Least Profit – Finds the products in the builder list that take up the most space and have the lowest profit margin and places these items in the most visible part of your display.

Most Profitable - Finds the products in the builder list that have the greatest profit margin and places these items in the most visible part of your display.

Least Profitable - Finds the products in the builder list that have the lowest profit margin and places these items in the most visible part of your display.

Large to Small - Finds the products in the builder list with the greatest volume and places these items in the most visible part of your display.

Small to Large- Finds the products in the builder with the least volume and places these items in the most visible part of your display.

Wide to Thin- Finds the products in the builder with the greatest width and places these items in the most visible part of your display.

Thin to Wide- Finds the products in the builder with the least width and places these items in the most visible part of your display.

Tall to Short- Finds the products in the builder with the greatest height and places these items in the most visible part of your display.

Short to Tall- Finds the products in the builder with the lowest height and places these items in the most visible part of your display.

4)Set the most visible height and automatic shelf.

Most visible height is the part of your display that customers are most likely to see and is usually set to the customers eye level. Set this value by clicking on the Most Visible Height button.

The automatic shelf option will add a shelf the width of the display if the first item in a new row does not have any peg hanger hole.

5)Set the number of facings for each item.

The number of facings is the number of times the product is consecutively placed in the display. To change click the cell in the Facings column for any given product in the builder list.

6)Click on the "Build Display" button.

The build display button deletes any items you may have in the display and then builds your display based on your builder options.

5.9 Grouping and Ungrouping Items

Grouping items together in your display allows you to move rows of items or multiple items at one time. You can have PlanoGraphics automatically create groups when you add items by selecting the AUTO GROUP PRODUCTS button on the vertical menu bar located on the left side of the PlanoGraphics main window.

The AUTO GROUP BUTTON is the 9th button from the top on the vertical menu bar.

For grouping items that have already been placed in your display, deselect any item that might be selected, click the left mouse button and hold it down and then start dragging the mouse cursor across the area of items you want grouped together. As you drag the mouse cursor you will see a selection rectangle following your mouse movements, showing you the area of your display that will be grouped together. When you release the mouse button all items that were

fully or partly in this selection rectangle will be grouped together.

Note that you can group groups of items together but this new group will not contain two "sub groups" but rather just a new larger group.

To ungroup items, select the group of items and then click on the UNGROUP BUTTON which is the 10th button from the top on the vertical menu bar, or select PRODUCT>>UNGROUP.

5.10 Aligning & Spacing Items

The Spacing feature lets you control horizontal spacing among grouped items. To add spacing between items in a group, make sure the products are grouped together then click on PRODUCT >> SPACE. Then enter the amount of space in the nearest 0.25 inch or cm (depending on your unit of measurement setting) and click OK.

The Align feature lets you control vertical alignment among grouped items. To align the top edges of items in a group click on PRODUCT >> ALIGN >> TOP. To align the bottom edges of items in a group click on PRODUCT >> ALIGN >> BOTTOM.

In order to enable Align or Spacing you must select an item that is part of a group. See Grouping and Ungrouping Items for information on grouping items.

5.11 Fine Placement: nudging and numeric placement

To do fine product placement and nudging you can nudge a selected product or a group of products by using the arrow keys.

To numerically place or move an item or a group of items in your planogram enter the new value in the X, Y panel in the upper part of the main program window.



For example, if you would like to move a selected product in your planogram so that the left edge of the product is 10 inches from the left edge of the planogram enter 10 after the x= and then the return key. To move an item 20 inches from the bottom of the planogram enter 20 after the y= and then hit the return key.

NOTES: Y values are measured from the bottom of the planogram to the top edge of the planogram. X values are measured from the left edge of the planogram to the left edge of the product. When moving or placing a group of products the X value is always the most left edge of the group and not the selected product. The Y value is always the most top edge of the group.

5.12 Planogram Settings

If you wish to change any of your planogram display settings after you have started a display click on FILE >> DOCUMENT SETUP. You can change the display size, background type and peg or slat configuration. If you change the display size, any items that are placed outside the new display area will automatically be moved to the upper left corner of the display.

5.13 Peg Hook Depth

By default all new items added to your display take the hook depth that you assigned in the DOCUMENT SETUP dialog box. If you want to change this value for an item that you have already added to your planogram, click on PRODUCT >> PRODUCT DETAILS. In the Product Details dialog change the Peg Hook Depth value and click OK. The Stack Count value will automatically recalculate to reflect the new hook depth the next time you open the Product Details dialog.

Details dialog change the Peg Hook Depth value and click OK. The Stack Count value will automatically recalculate to reflect the new hook depth the next time you open the Product Details dialog.

5.14 Saving your planogram

When you are done making your product display you can save it just like any other document based program by clicking on FILE>>SAVE.

You can save your product display in two formats, as a document or as stationary / template. To save a document as stationary, just save it in the Stationary sub folder under the programs main installation folder. All documents saved in the Stationary sub folder will appear in the Stationary tab in the New Document setup dialog that appears when you click on FILE>> NEW in the main menu. Using stationary allows you to create a new document based on a saved file. The new document inherits all the product and fixtures in the Stationary document which can save you lots of time if you need to create several planograms based on a standard planogram layout.

5.15 Displaying Product Information with TAGS

TAGS are small text boxes that are automatically grouped with an item when it is added to your display. The difference between a text box and TAGS is that the information on the TAG is filled out and updated automatically. The kind of information you can choose to have displayed in tags include:

PLACEMENT ORDER,
PRODUCT PART NO
THE X &Y COORDINATE
PRODUCT STACK DEPTH.
UNITS SOLD
INVENTORY LEVEL
CATEGORY
BRAND
CUSTOM TEXT

The X coordinate is the distance from the left edge of the display area to the left edge of the product. The Y coordinate is the distance from the bottom of the display to the top edge of the product. You can use these coordinates when setting up a real display. To show or remove TAGS click on VIEW >> TAGS and then select the tag type you want to show.

To enter text to the Custom Text select an item in your planogram and then select to VIEW >> TAGS >> ENTER CUSTOM TEXT. To clear custom text from an item, select the item and then select VIEW >> TAGS >> ENTER CUSTOM TEXT. When the input box appears clear the text in the editable part of the input box and then click on the OK button.

NOTES: If you turn off the Custom Text Tag, the custom text for each item is not deleted. It is saved with the planogram and simply becomes invisible until you turn the Custom Text Tag on

again. The Category and Brand Tags will only show information if a Category and or Brand column is defined in your catalog file (which is true by default when you create a new catalog file in version 3.5 of PlanoGraphics) and the Category and or Brand information is filled in for the selected product.

5.16 Display Modes

By default PlanoGraphics displays your product pictures when there is one available and a placement box when a picture is not available. You can override this so that only placement boxes are displayed regardless of the availability of a product picture. Placement boxes may be desired for increased performance on slower computers or when working with large picture files. This setting is applied to printing and exporting as well as screen how products are displayed on the screen. Image backgrounds are always displayed as an image regardless of this setting. To change the display modes click on VIEW>>MODE.

By default placement boxes are colored automatically based on the product's size. Placement boxes can also be colored automatically based on Category and Brand. Color options can also be turned off so that placement boxes are black and white wire frames or you can manually set the color for each placement box. To change how placement boxes look select:

VIEW >> MODE >> PLACEMENT BOX >> (and then one of the following options)



- 1) Color by Size.
- 2) Color by Category - This option requires that you have a "Category" column defined in your catalog file or database and that it is filled in for each product.
- 3) Color by Brand - This option requires that you have a "Brand" column defined in your catalog file or database and that it is filled in for each product.
- 4) All White - This creates white placement boxes with a black frame.
- 5) Set Manual Color - This allows you to assign a custom color for a selected item in your planogram.
- 6) Clear Manual Color - This clears the manual color for a selected item and assigns the currently selected automatic color.
- 7) Clear All Manual Colors - This clears all the manual colors for a all the items in your planogram and assigns the currently selected automatic color.

NOTE: When you assign a manual color to an item the color for the item is locked and will not change even when the automatic color option is changed. The only way to unlock the manual color is to select the Clear Manual Color or the Clear All Manual Colors. The manual color options are also accessible through the context menu (right mouse click on a product in your planogram).

5.17 Sharing your planogram files

PlanoGraphics planogram files, picture files and catalog files can be stored on a network and used by multiple users at the same on the same network.

If you plan to send your planogram file to someone else you will need to make sure they have access to the same catalog file you used to build your display.

In addition, if you want them to be able to view pictures of the products in your display as well you will need to include all pictures files.

If you get planogram files, catalog files or picture files from someone else place the catalog and picture files in the Catalogs sub directory where you installed PlanoGraphics. This will insure that all the referenced picture and catalog files will be found. PlanoGraphics looks for any referenced files in these locations if the files can not be found in their original location.

If you want to be share your planogram display file with someone and they don't need to edit the file then consider exporting the file instead as explained in the next section.

5.18 Sharing your files between Mac and Windows users

PlanoGraphics planogram files, picture files and catalog files can be shared over networks and disks between Mac and Window users. Because of the difference in the way both operating systems work there are a few details you need to pay attention to in order to share files between both platforms:

1) Mac version 2.5 of PlanoGraphics can read catalog files created in any version of PlanoGraphics for Windows. Catalog files for version 3.5 of PlanoGraphics for Macintosh are not compatible with the Windows version of PlanoGraphics and must be exported to a text file and then reimport to the desired platform version. Direct Data Links are not available on the Macintosh version. Version 3.5 planogram files can be opened in any 3.5 version.

2) Mac users must remember to add the correct PC file extensions to their files. You can have PlanoGraphics do this automatically for you every time save a file by selecting EDIT>>OPTIONS... Add PC Extension in the Main Menu. Picture files must also have the correct 3 letter extension like JPG, TIF, BMP.

3a) Since both platforms store file path information differently you must do the following on the Windows version of the program:

a) Store all product pictures for each catalog in a single folder

b) Link all you pictures.

c) Set the Photo Collection Path for your catalog in the Catalog Manager, once in the Windows version and then once again in the Mac version by clicking on (for Windows) PICTURE >> SET PHOTO COLLECTION LOCATION and then clicking on the FIND button on the menu bar and navigating to the folder that has all the pictures for your catalog.

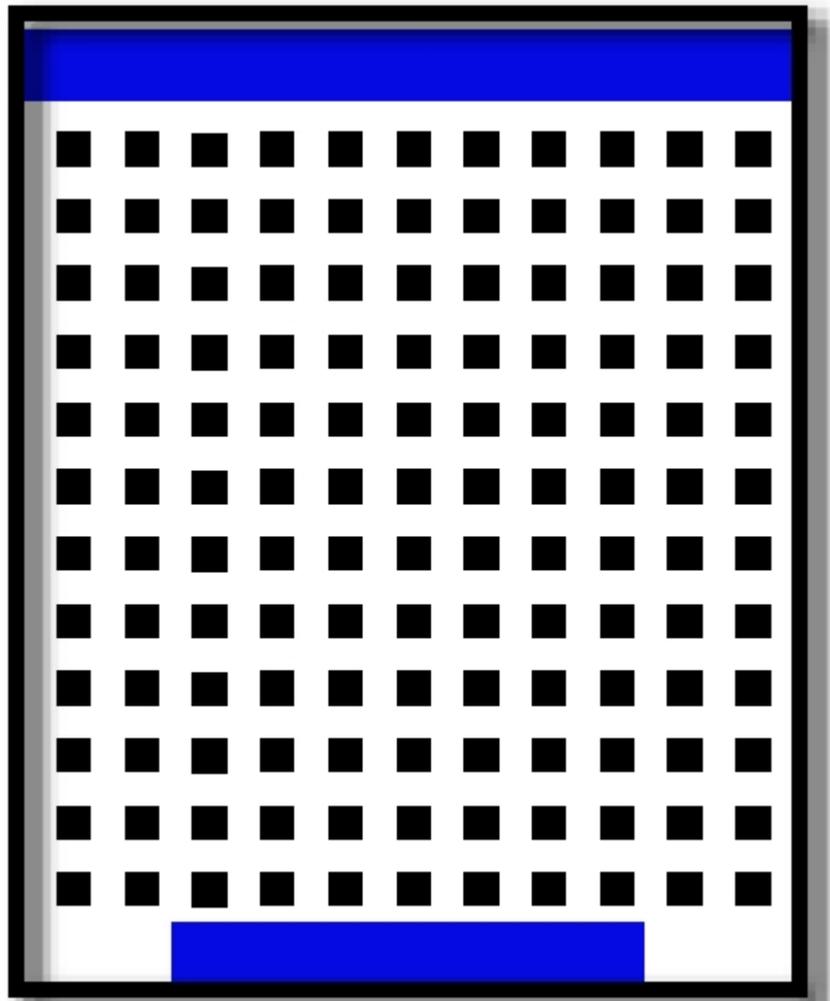
d) Remove all picture path information in the Picture Column of your catalog by clicking on GRID>>REMOVE PICTURE PATH

3b) On the 3.5 Mac version do the following:

a) Mac users must select EDIT>>OPTIONS... Show PC Files in order to be able to "see" and open PC from the Open Dialog Box.

b) Move pictures to a shared folder and change the picture location under the program options.

PlanoGraphics™ 3.5



Part
VI
Reports

6 Reports

6.1 Overview

PlanoGraphics Quick Reports report writer allows you to create the following reports:

1. Product Listing
2. Investment and Profit
3. Space Usage
4. Fixture Listing
5. Sales Ranked by Units Moved
6. Sales Ranked by Turnover
7. Sales Ranked by Profit

To make reports click on REPORTS >> QUICK REPORTS. After your report has been generated you can edit the report text, save the report or print it.

For custom reports PlanoGraphics uses the power of Microsoft Excel to give you very extensible and highly customizable reports. When you want to make a report you select a report template, which is an Excel template file with certain reserved cells that PlanoGraphics uses to display data about your display. PlanoGraphics instructs Excel to load your selected report template and then sends all the data about your display to Excel and instructs Excel where to put the data then instructs Excel to copy and re-reference any custom formulas you may have entered in the template.

To make a custom report, create a display, add items to the display, select REPORTS >>REPORT WRITER, select a report template, and then click on Make Report.

6.2 Making Custom Report Templates

To make your own report templates do the following:

Make a new document in Excel.

In the new document the following cells are reserved for the following uses:

A1= Place the title of your template here

B1 = Reserved for the name of the PlanoGraphics display that the report is based on. PlanoGraphics will fill in this cell for you when you make a report.

D1 = Reserved for the width of your display. PlanoGraphics will fill in this cell for you.

F1= Reserved for the height of your display. PlanoGraphics will fill in this cell for you.

H1= Reserved for the unit of measurement for your display. PlanoGraphics will fill in this cell for you.

All of Row 2 can be used as column headers like Item number, Product ID, etc.

The remaining rows are used to list each of the items in your display. PlanoGraphics uses columns A,C,E,G,I,K,M and O to place product data and product attribute data.

The columns in-between these reserved columns can then be used by you to enter custom formulas. You only need to make your formula in row 3. PlanoGraphics will then instruct Excel to copy the formulas down to the next row and to change references in the formula that are not absolute references.

The Columns that PlanoGraphics uses from row 3 and onward are reserved for the following product information:

A= Item number

C= Product Part Nr / ID

E=Product description

G= Product Width

I= Product Height

K= Product Depth

M= Product Cost Price

O= Product Sales Price

For example, if you wanted a column in your report that would calculate the net profit of each item in your display you would place the following formula in cell P3

$= (O3 - M3)$

Then when your report was generated Excel would copy this formula for each item in your display to changing the references automatically. So if you had 3 items in your display the following cells would contain the following formulas after your report was generated:

Cell P4 would contain $= (O4 - M4)$

Cell P5 would contain $= (O5 - M5)$

Remember however, when you make your template all you have to do is worry about entering your formulas in row 3 in any of the non reserved columns. If you want to learn more about report templates trying opening the templates that come with PlanoGraphics and study how the formulas in the templates are built up and use them as a starting template for your own custom reports. We are also glad to help you create custom reports or to answer questions on how to do it. Please visit our web site for contact information at www.planographics.com.

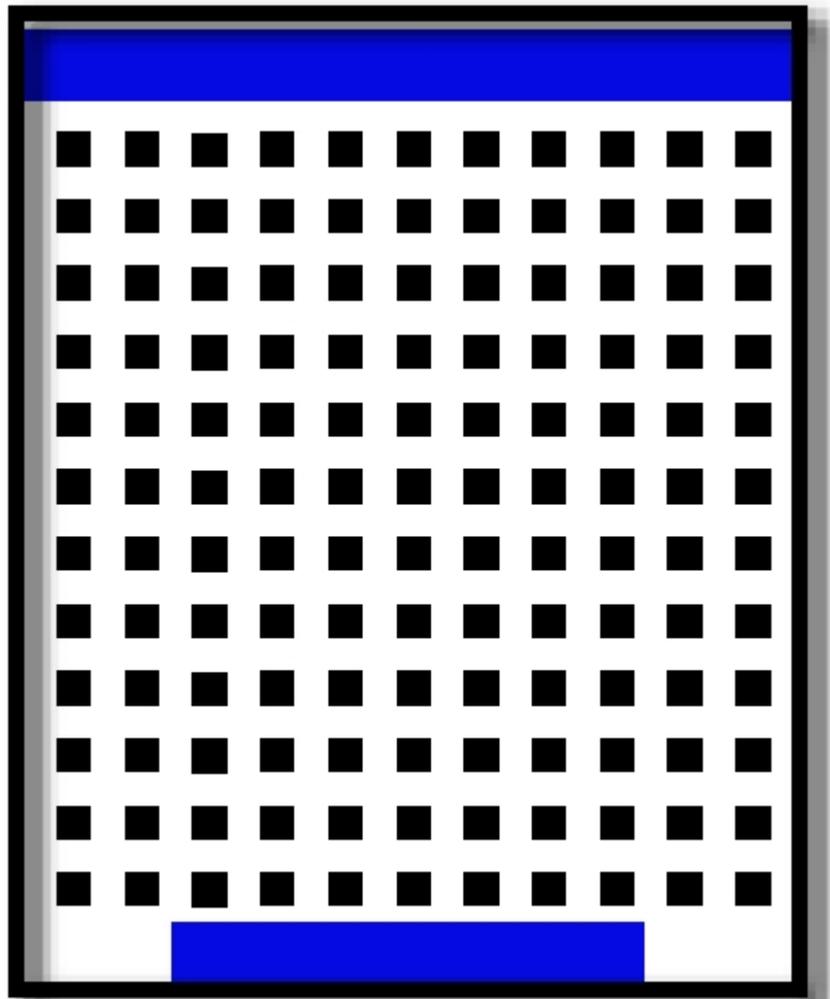
6.3 Reporting Low Inventory Levels

To get a report on low inventory levels turn on the Reorder Alarm by clicking on REPORTS >> REORDER ALARM. When the inventory level for an item has reached the minimum order level you define in your product database a REORDER Tag becomes visible on the item in your planogram.

This feature is especially useful when your planogram uses a direct data link to your ordering, invoicing or inventory system's database, giving you an immediate visual indication of low inventory levels.

In order to use this feature you must have an inventory level column in your database and a minimum inventory level column in your database and then match these columns to the Inventory and Low Inventory Amount data types under the Data Field Assignment Options in the Catalog Manager.

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Part

VII

Publishing Planograms

7 Publishing Planograms

7.1 Overview

To share your planogram with others you can export your planogram to a variety of picture file formats, you can print your planogram, or you can have PlanoGraphics build a complete web site based on your display.

7.2 Exporting

You can export your planogram to a variety of picture file formats. Exporting to a picture file format more or less makes a "snap shot" of your planogram. You can view an exact copy of your planogram but it can not be changed or edited. Supported file formats include HTML, BMP, TIFF, Targa and JPEG. In addition you can also choose if you want a high resolution or low resolution version of your exported planogram. In most cases the low-resolution version will be adequate quality. If however you plan to use the exported file for offset professional printing for catalogs and brochures you will want to use the high-resolution setting.

7.3 Making Adobe Acrobat PDF files

Adobe® Portable Document Format (PDF) is the open de facto standard for electronic document distribution worldwide. Adobe PDF is a universal file format that preserves all the fonts, formatting, graphics, and color of any source document, regardless of the application and platform used to create it. Adobe PDF files are compact and can be shared, viewed, navigated, and printed exactly as intended by anyone with free [Adobe Acrobat® Reader®](#) software.

PlanoGraphics allows you to output your planograms and any of the built-in reports directly to a single PDF file without the need for post processing or the need for Adobe Acrobat or Adobe Distiller. In addition you can encrypt and compress PDF files created with PlanoGraphics for secure and easy transmission over the Internet.

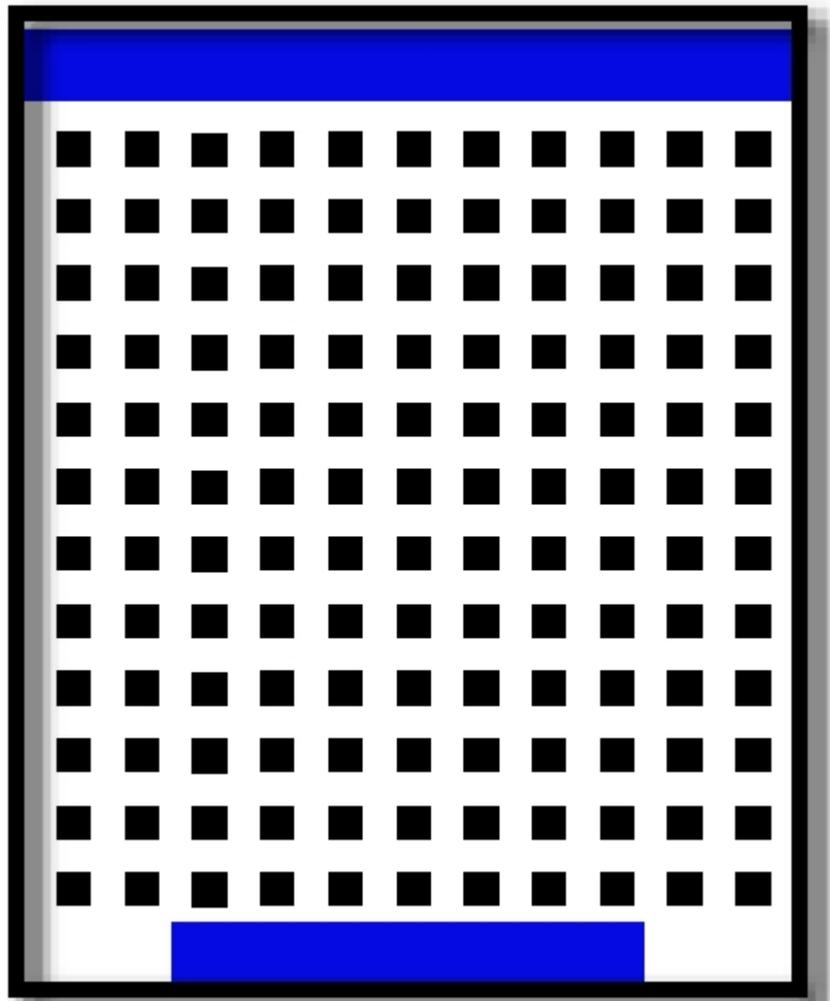
To create a PDF file click on FILE >> MAKE PDF

In the PDF options dialog box select the planogram and report contents and the compression and password options and click on OK.

7.4 Printing

You can print to any printer supported by Windows. Select FILE>>PRINT. PlanoGraphics will automatically calculate the paper orientation and scaling to maximize usage of the printable area of the paper. For example if you select an A4 / Letter paper size or an A3 / Legal paper size and PlanoGraphics will scale the print image to fill out the whole page.

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Part

VIII

Program Options

8 Program Options

8.1 Selecting Unit of Measurement

You can change the unit of measurement that PlanoGraphics uses to display a product's position and for reports and making web sites by selecting EDIT>>OPTIONS.

Units of measurement options include:

Centimeters

Inches

8.2 Tips

Tips-turns on and off tips that appear when you place the mouse cursor next to a button or other part of the program.

8.3 Welcome Window

Welcomes you with planogram wizard when you first start the program. This option can be switched off in EDIT >>OPTIONS or by deselecting the Show At Start option on the planogram wizard dialog box.

8.4 Align to Peg Holes

Aligns products to Peg Holes that have an X position and Y position column defined in your product database or catalog.

8.5 Time Date Stamp on Planogram

Adds the current date and time to all printouts image exports and PDF exports

8.6 Show Loading Data dialog box

Use this setting to show or hide the status of loading products a catalog for larger catalog files when a planogram is opened or a new planogram is created.

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