



Inventory Management AMS Planograms

Creating and Using Planograms

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Introduction to Planograms

Planograms are visual aids, depicting the physical layouts of your market inventory. You can use planograms to ensure that products are placed in your markets where they will sell the best. To learn more about merchandising and maximizing product placement within your market, consult the Executive Professional, *Analyzing Market Demographics & Merchandising* module in Avanti Institute.

In this module you will learn how to create planograms using AMS. You can add and remove rows/shelves and columns/slots to customize each planogram to match your market equipment. You can then drag and drop products into your planogram.



Currently, each planogram is for a single display/storage unit, being one cooler, freezer, or snack rack. You will create multiple planograms for a single market.

Once in your market, the driver can use the kiosk's **Administrative Menu**, and select the **View Inventory or Planogram** option to prepare each rack, cooler, or freezer at that location.

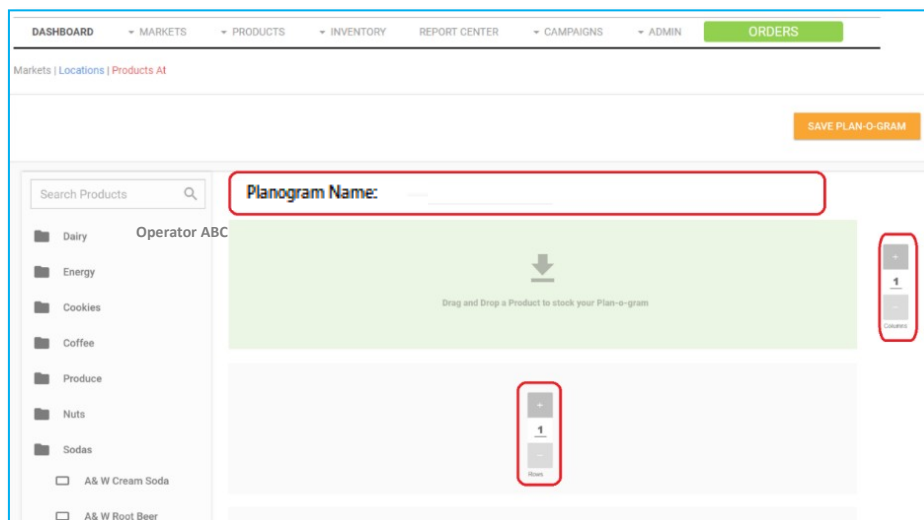
How to create a planogram in AMS

1. On the AMS DASHBOARD, click **MARKETS**, and then select **LOCATIONS**.
2. Click a **location** in the list to open it.
3. Click the **Planograms** tab, and then click **NEW PLANOGRAM**.
4. Enter a **name** (see the following recommendation), and then click the **+ -** to add/remove **row** (shelves/racks) and **columns** (shelf-slots) to your planogram, and then click **SAVE PLANOGRAM**. Be sure to match the number of shelves and slots that are present in the market's equipment for which you are making this planogram.

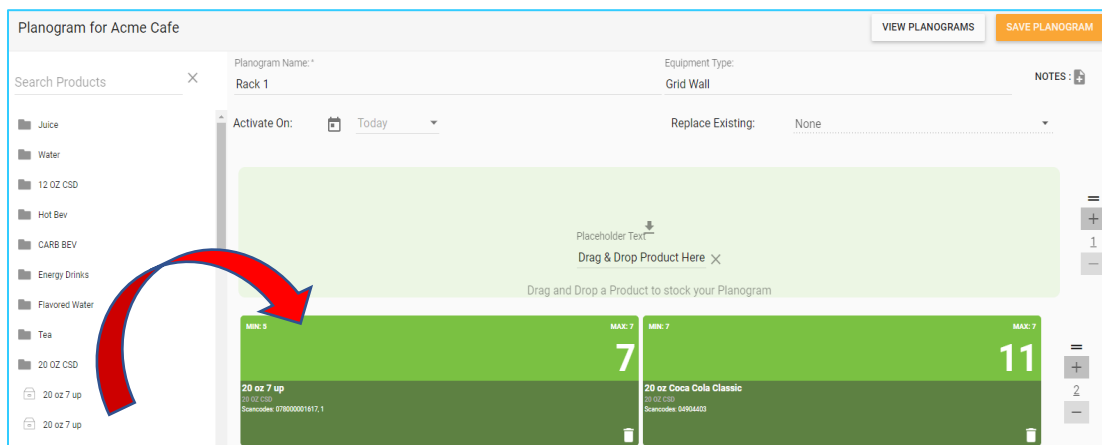


RECOMMENDED NAMING CONVENTION: Manufacturer/Equipment Type/Model, Number of Unit (for example, 1 of 6, 2 of 6, and so forth). For example:

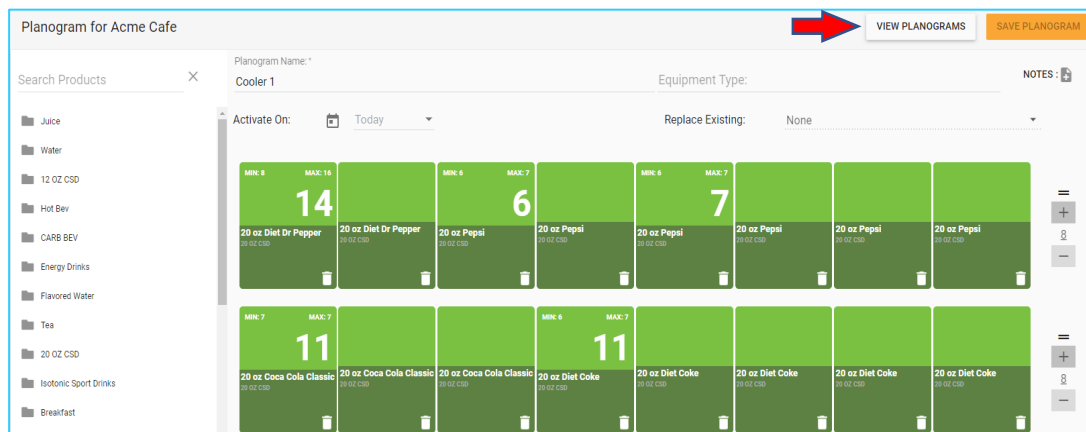
Avanti GDS-47-HC Drink Cooler 1 of 3, or Pepsi Beverage Cooler 2 of 2, or Snack Rack 1 of 2.



5. Navigate the **Product List** on the left-side, and then drag and drop products into its proper place on the planogram. Each product will create tiles in your planogram.



6. Repeat for all products you want stored in this display unit, and then click **SAVE PLANOGRAM**.

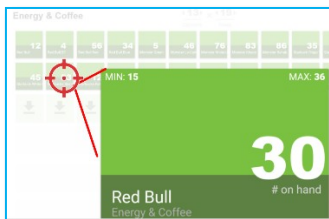


7. Repeat these steps for all display units in this market location, creating a separate planogram for each display unit.

How to Adjust Attributes of a Product in a Planogram

1. To edit your planogram, do the following:
2. Click a tile to view the **product name**, **Min/Max** levels, and **On Hand** values. Some larger tiles will display product group/category and scan code.

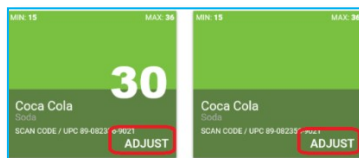
NOTE: You will only see the number of units on hand for the first instance of a product in that planogram.



3. Click **REMOVE** in any product tiles to remove it from the planogram.



4. To replace a product in the planogram, drag and drop a new product from the left-side list over an existing tile in the planogram.
5. Click **ADJUST** in any of the product tiles to adjust inventory levels.



Once your AMS syncs with your market's kiosk, the planogram will appear in the market's kiosk ADMINISTRATIVE MENU, in the View Inventory & Planograms option.

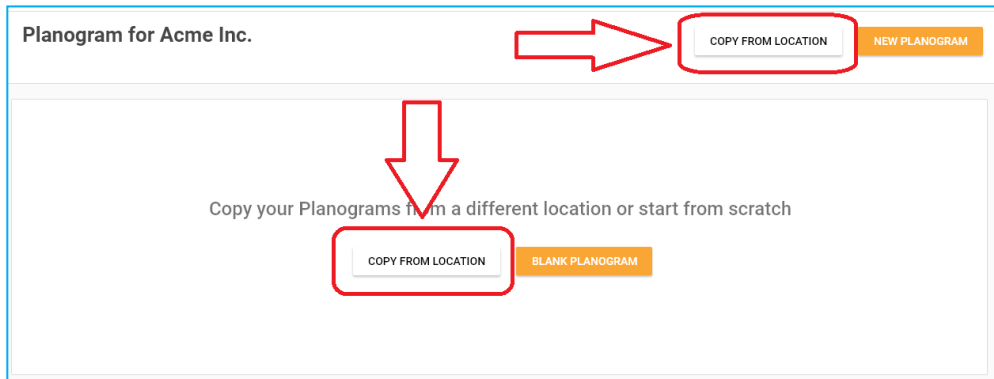
How to View all Planograms

1. To view all the planograms for a location, click the **PLANOGRAMS** button when viewing a location.
2. A list of planograms for that location appear in the left-side pane. You can enter a planogram name in the search bar or scroll the list to find the planogram, and then click the **name** in the list to open.

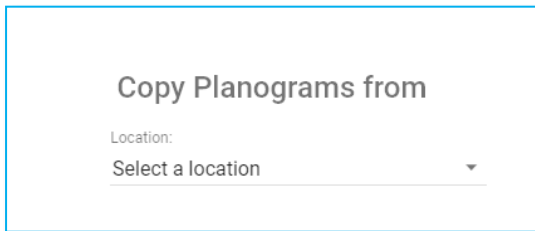
How to Copy Existing Planograms From Another Location

Once you have created at least one Planogram at a location you will see the **COPY FROM LOCATION** button when you attempt to create a planogram at a location.

1. Once you have done so, go to a Markets > Locations > Location Name > Planograms
2. To copy a planogram from a different location click **COPY FROM LOCATION**



3. Use the dropdown to select the location you would like to copy planograms from.



4. Choose the planograms you want to copy by clicking the checkbox on the right, then click **COPY**.
5. *Note:* you can select all planograms at the location by clicking the checkbox in the top right of the table.

PLANOGRAM NAME	# OF UNIQUE PRODUCTS	
1st - 2ft Section	20	<input checked="" type="checkbox"/>
3rd - 2ft Section	30	<input type="checkbox"/>
4th - 2ft Section	25	<input type="checkbox"/>
5th - 2ft Section	32	<input checked="" type="checkbox"/>
CSD	10	<input type="checkbox"/>
Energy & Coffee	15	<input type="checkbox"/>
Food Cooler	15	<input checked="" type="checkbox"/>
Non Carb	10	<input type="checkbox"/>
Water Cooler	20	<input type="checkbox"/>

- If there are products in the planogram that are not at the new location you are copying the planogram to, you will see a list of these products once you choose to copy the planogram.

Missing Products at Portland Location 2		CONTINUE
PRODUCT NAME	PLANOGRAM NAME(S)	
Red Bull	1st - 2ft Section	
Red Bull	3rd - 2ft Section	
Red Bull SF	4th - 2ft Section	

- Take note of these products as they will not show in the new planogram.
Note: You will also be notified which planograms the missing products are a part of.
- Click **CONTINUE** and notice all the planograms that were selected to copy to your new location are now visible to edit/duplicate/remove.

Missing Products at Portland Location 2		CONTINUE
PRODUCT NAME	PLANOGRAM NAME(S)	
Red Bull	1st - 2ft Section	

- For each planogram add or edit products as needed to modify the planogram to correctly represent all the products that should be in the planogram at that location.

How to Edit/Delete Planograms

- To edit a planogram, in the left-side menu, click a planogram name in the list, and then click .
- To delete the selected planogram, click , and then click **Yes** to confirm.

Planogram for Acme Inc. COPY FROM LOCATION NEW PLANOGRAM



Search Planograms

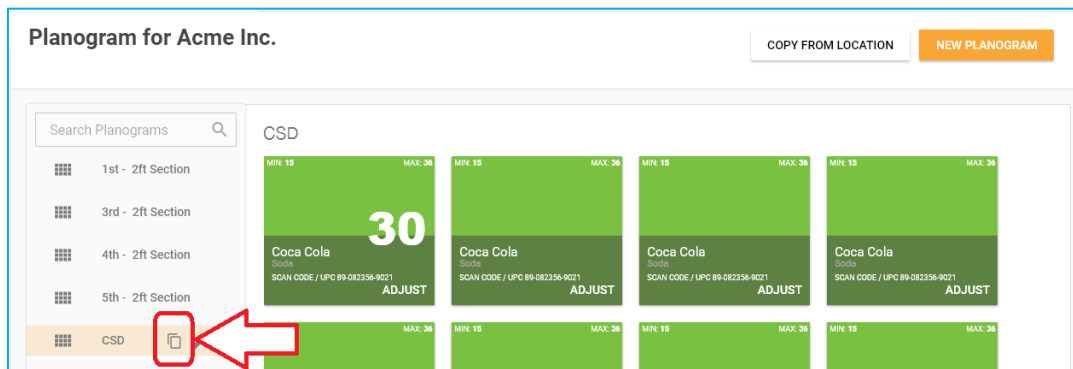
- 1st - 2ft Section
- 3rd - 2ft Section
- 4th - 2ft Section
- 5th - 2ft Section
- CSD

CSD

30	30	30	30
Coca Cola <small>SCAN CODE / UPC 89-082356-9021</small> ADJUST	Coca Cola <small>SCAN CODE / UPC 89-082356-9021</small> ADJUST	Coca Cola <small>SCAN CODE / UPC 89-082356-9021</small> ADJUST	Coca Cola <small>SCAN CODE / UPC 89-082356-9021</small> ADJUST

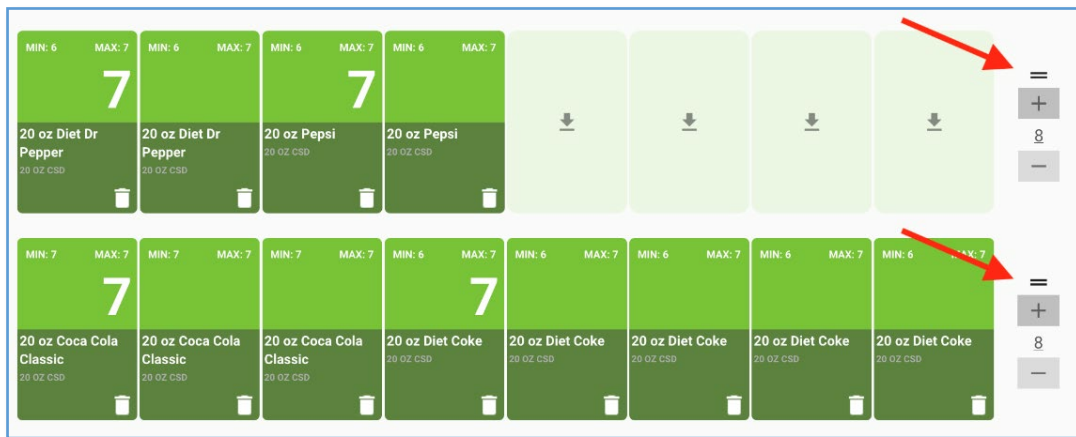
How to Duplicate a Planogram

1. To duplicate a planogram, in the left-side menu, click a planogram name in the list, and then click .
2. This will create an exact copy of the planogram with the same name and append the new planogram name with the text "Copy".
3. To edit the name, click  and modify the name as needed.



How to Reorder Planogram Rows

1. Once in editing mode, select use your mouse to select the two "grab lines" above the cell count.
2. Drag the row up or down to change the location of the row. All cells in that row move with the

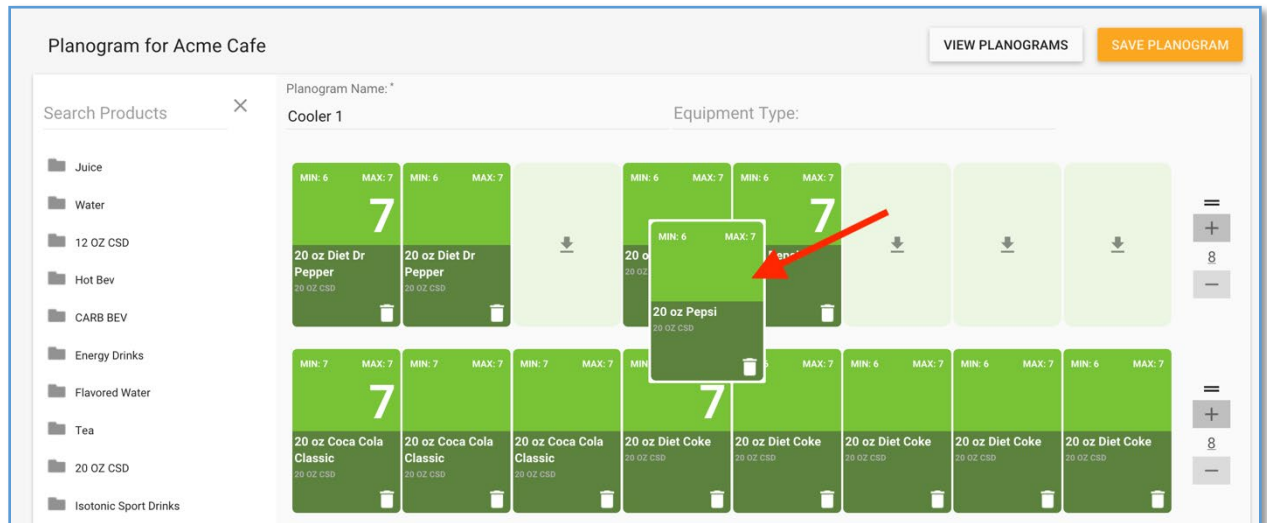


row.

3. Select the **Save Planogram** button when you are done editing to save your changes

How to Reorder Planogram Cells

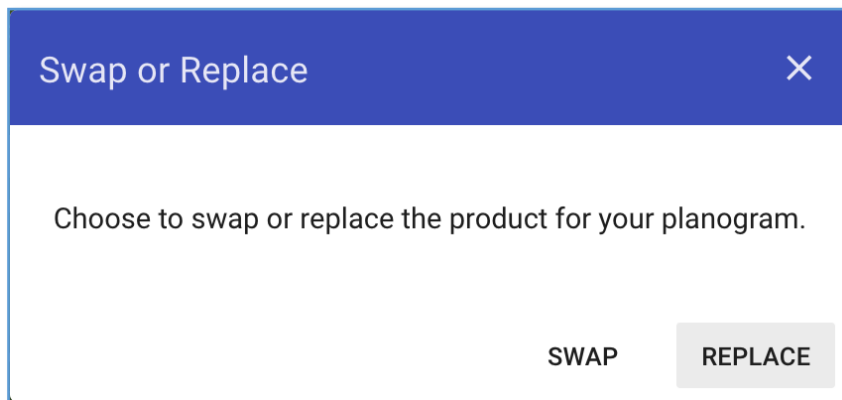
1. While in editing mode, click and hold a cell in your planogram (you can click anywhere in the cell)



2. Drag the cell to an empty slot to move the cell, or drag the cell to an existing cell to see options

How to Swap an Existing Product with a New Product

1. Select and hold a cell so you can drag it. Instead of moving the existing cell to an empty slot, move it to a slot that's filled by a product that you want to swap.



2. A dialog box appears. Choose the option to **SWAP**.
3. The product locations are now reversed. Select save to finalize your changes.

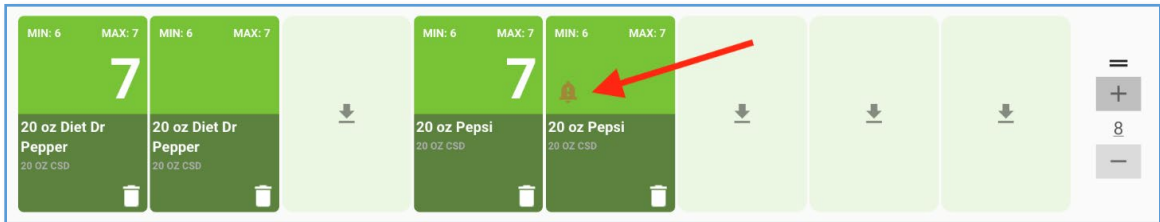
How to Replace an Existing Product with a New Product

1. Select and hold a cell so you can drag it. Instead of moving the existing cell to an empty slot, move it to a slot that's filled by a product that you want to swap.
2. A dialog box appears. Choose the option to **REPLACE**.

3. The product you selected now replaces the product that was in the cell. Select save to finalize your changes.

How to View Changes to a Planogram

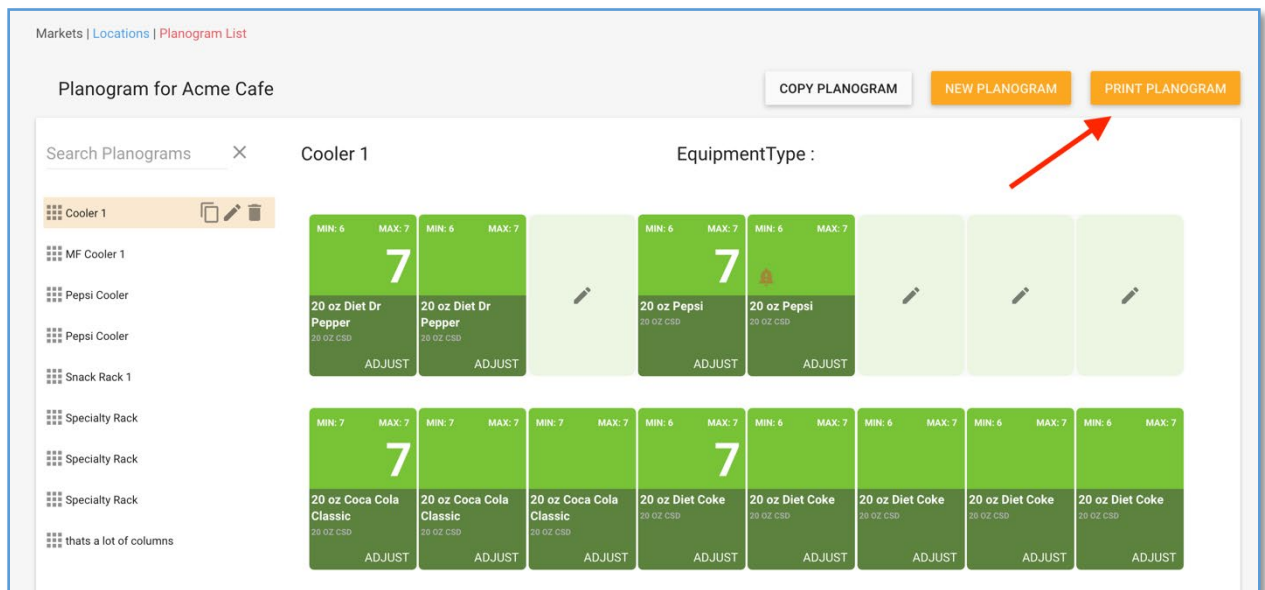
1. Open any planogram
2. If a product has been added, moved or replaced the cell will have a notification icon in it



Note: The notification icon will be shown on any changed cell for seven days and will disappear automatically after seven days.

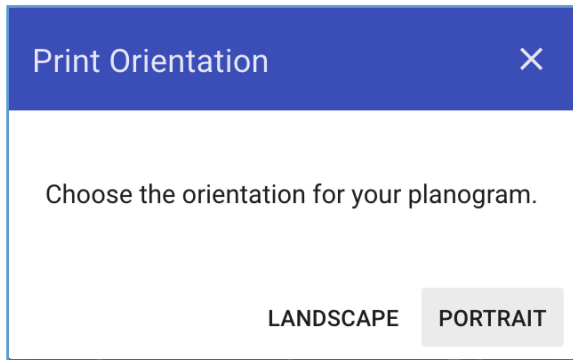
How to Print a Planogram

1. Ensure you are not in edit mode for the planogram
2. There is a **PRINT PLANOGRAM** button



3. Select the **PRINT PLANOGRAM** button.

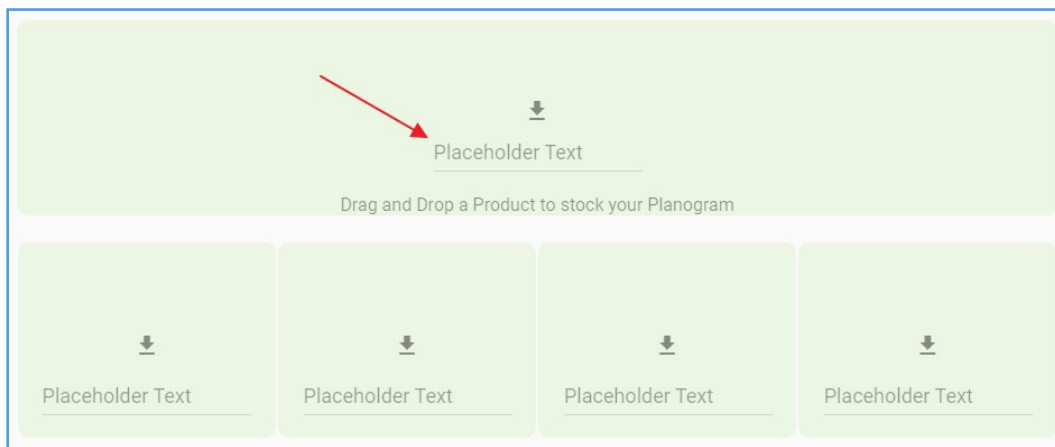
4. You are shown an option to choose Portrait or Landscape format.



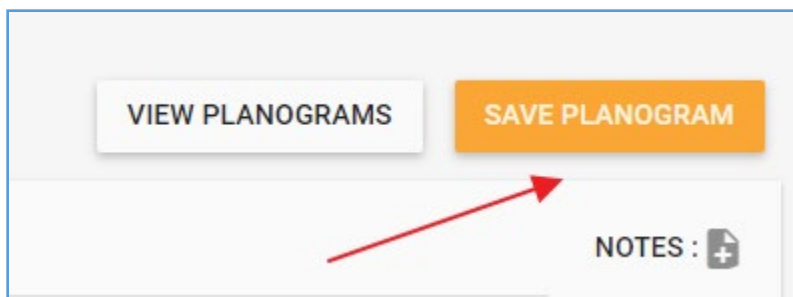
5. A PDF of the planogram will be created. You will see options allowing you to open the PDF or save it. You can open and print the PDF.

How to Add Placeholder Text

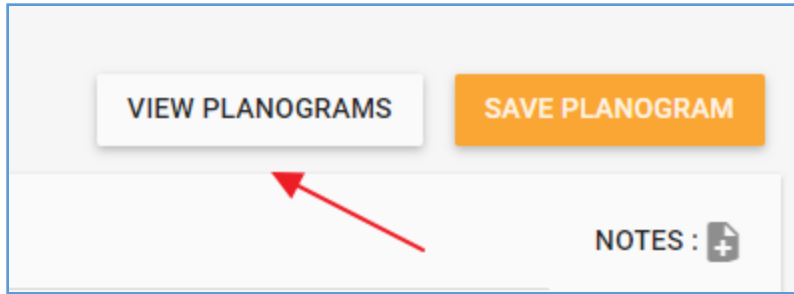
1. In Edit mode, notice each cell has a field called Placeholder.



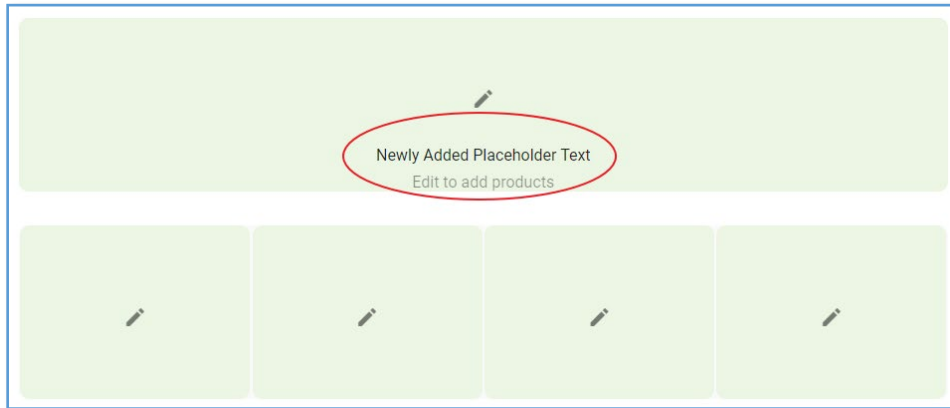
2. In Edit mode, add text that you want to display in an empty cell once the planogram is saved.
3. Click **Save Planogram**.



4. Click **View Planogram**.

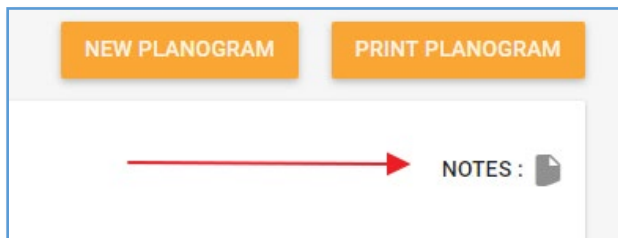


5. Notice the empty cell now has your previously inputted placeholder text.

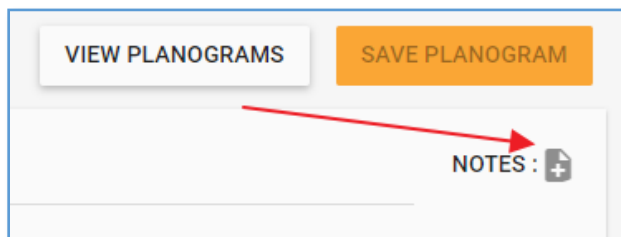


How to View or Add a Note

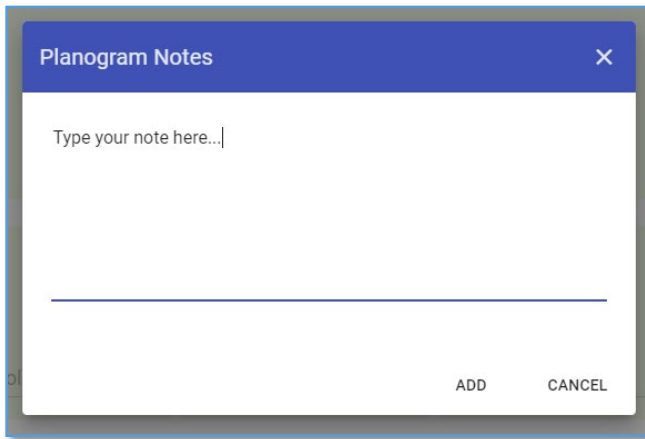
1. In View mode notice the **note label and icon** in the top right corner of the planogram page right under the buttons.



2. In View mode click the **note icon** to get a modal window with the note for that planogram
3. In Edit mode notice the note label and icon with a plus in the top right corner of the planogram page right under the buttons.



4. In Edit mode click the **note icon** with the plus to get a modal window where you can add a note.

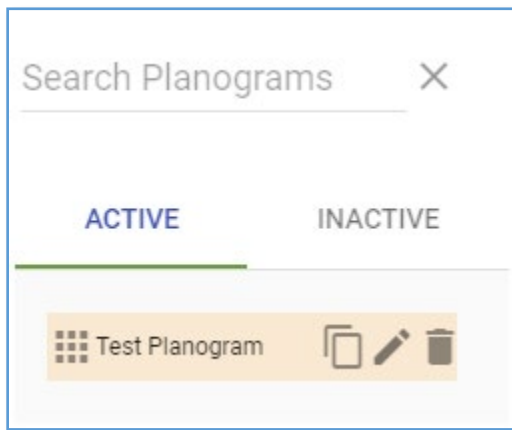


5. Click **ADD** to add the note to the planogram
6. Make sure you save the planogram in order to save the note as part of the planogram

Helpful Hint: Notes are also added to the printable planogram.

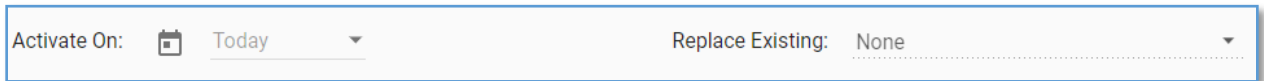
How to Stage a Planogram to replace an existing planogram in the future


1. In View mode you will notice there are two tabs on the left-hand side of the screen. **ACTIVE** and **INACTIVE**



2. Active Planograms are those which are live for the selected location.
3. Inactive Planograms are those which are staged to replace an active planogram at a later time in the future.
4. Click **New Planogram** to create a new planogram.

5. Notice there are two options under the Name of the planogram. These two fields will control when a planogram is replaced and which planogram it replaces.



Activate On:  Today Replace Existing: None

6. Select the date you wish the planogram you are creating to replace an existing planogram
7. Next, choose the planogram from the **Replace Existing** dropdown that you want replaced on the date selected in the previous step.
8. Add products and placeholder text as desired and save the planogram.
9. Notice, the planogram now shows up in the **inactive tab**.
10. The existing active planogram will be replaced on the date selected and be reflected in AMS, on the Kiosk, and INV.

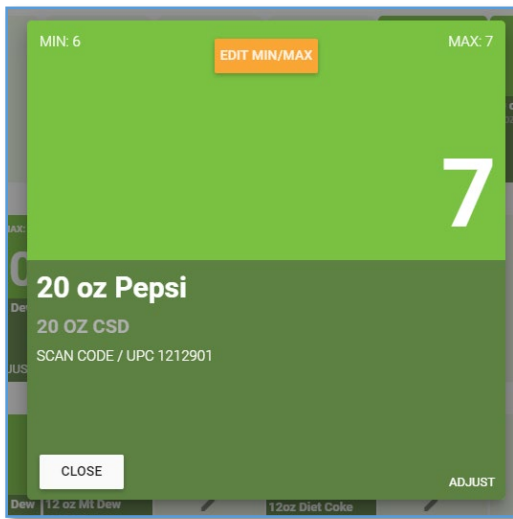
Helpful Hint: You cannot delete an Active planogram that is set to be replaced. In order to delete an active planogram that is set to be replaced, you must first delete the inactive planogram that is set to replace it.

How to Adjust Min/Max from the Planogram Tiles

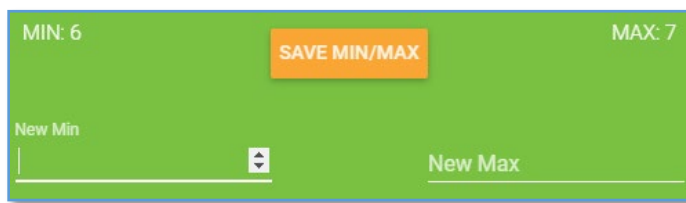
1. In View mode, double click on a tile for a product you want to adjust the min/max on.



2. Notice the **Edit Min/Max** button at the top of the tile



3. Click the **Edit Min/Max** button



4. Enter the new Min/Max values
5. Click **Save Min/Max** button
6. Your updated min/max values are now saved

Document Revision Description	Date
1.0 outline for tasks	02/14/2018
Added Duplicate and Copy Sections	04/16/2018
Added Planogram Enhancements	04/24/2020