

PlanogramBuilder - User Guide



Version 48 - January 2024

What is new in version 48

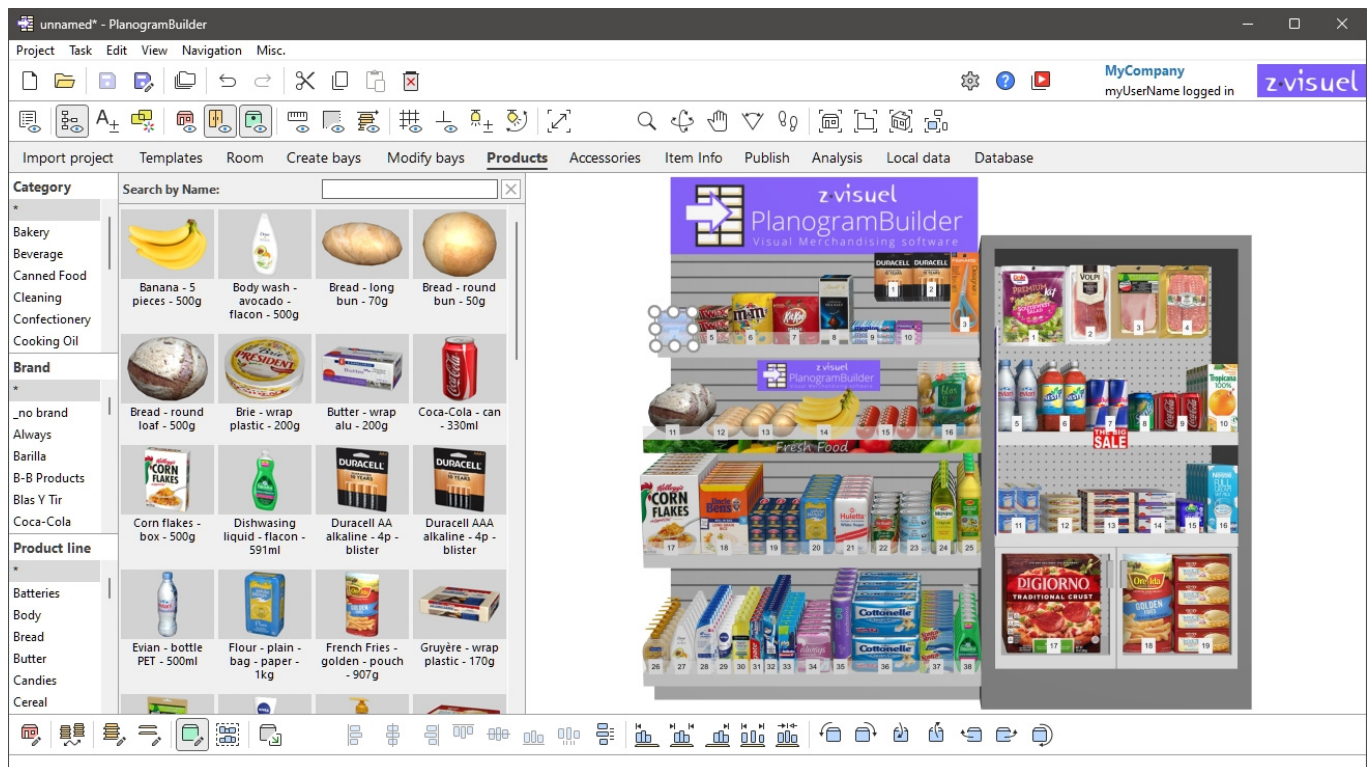
Attention: all users must update PlanogramBuilder before February 12, 2024.

Instructions and download link: [Install PlanogramBuilder](#)

News for the user interface

A major refresh of the user interface is brought with this update.

There are new toolbars and clearer icons for all the tools, commands and toggles of the application. This provides one-click access to features that were previously only available from the menu, for example [Tools and commands \(View\)](#) and [Tools and commands \(Products\)](#). The updated interface is described in [Screen Layout](#) and [Toolbars](#).



- Buttons can display optional 2-line captions and more descriptive tooltips with the corresponding keyboard shortcut. Please read more in [Toolbar buttons](#).
- The tabs for tasks have adopted a more modern look, as shown above.
- Some terms of the user interface have been revised for clarity and consistency. Here are some examples of changes:
 - The names of each tool, command or toggle is now the same in the menus and toolbars, for better consistency.
 - The *Display* Menu has been renamed to [View](#) (applies to English only), as in most Windows applications.
 - Commands named *Add* have been renamed: [Insert \(project\)](#), [Insert the bay](#), [Insert generic product](#).
 - Commands to rotate products by 90° have been renamed with clearer words. Refer to [Rotate products](#).
 - Commands to import projects have been renamed for clarity: [Import as new project](#), [Import into current project](#).
- New keyboard shortcuts have been introduced, for example *Shift+A* for [Fit all](#), *Shift+S* for [Fit selected](#) and *Ctrl+A* for [Select all products](#). Please find the complete list in [Mouse & keyboard shortcuts](#).

News for database management

- It is now possible to establish a direct connection between your PlanogramBuilder database and external data through our new API. It enables updating and reading from your database programmatically. Consult the section about [Database API](#).
- The database list lets you display columns for any item property and re-order them as you wish. This also enables searching for items by text for any property, for example a custom property. More information in [Content choice \(Database item list\)](#).
- There are now 12 custom properties available instead of 6. Please refer to [Item custom properties \[1 – 12\]](#).
- Import and Export of the database is now much faster, especially for images. The bandwidth speed is shown in the confirmation dialog box.

News for editing planograms

- New commands have been added to cut, copy and paste products and accessories, even between different projects. Refer to [General edit commands](#).
- For the following features, you can now insert objects in your planogram at the desired position (as with [Insert generic product](#)):
 - [Insert \(project\)](#)
 - [Inserting templates into a planogram](#)
 - [Insert the bay](#)
- Highlighting disabled items is no longer a dedicated toggle. It is now accomplished from *Project item list*, as explained in [Highlight by](#) and illustrated in [Highlight by Enabled](#).
- After activating the task named *Modify bays*, [Edit bays](#) is automatically activated instead of [Edit bay components](#). You must then click on *Edit bay components* to edit the bay parts.
- [Full screen](#) now displays viewing and editing toolbars to facilitate full screen planogram manipulation.
- Two new alignment commands have been introduced: [Center horizontally \(products and accessories\)](#) and [Center vertically \(products and accessories\)](#).

News for Project item list and Reports

- New properties can be listed as columns: *Shape* and *Image (1 – 6)*. These properties are available under the new group named [Appearance](#) in Content choice (Project item list).

Overview

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

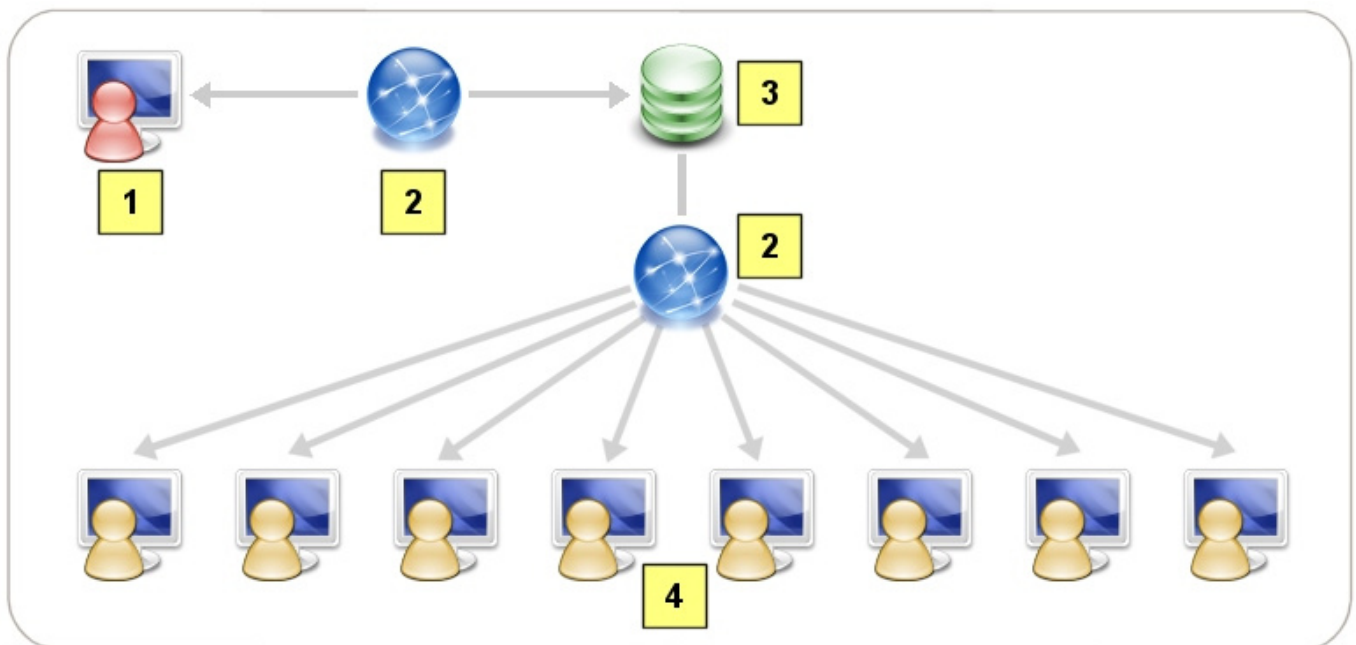
PlanogramBuilder is a web-connected Windows application. Your company can have any number of users accessing the application from anywhere with a web-capable PC.

This system is very flexible as it can suit a single person or large companies with hundreds of users doing planograms across the world.

The solution includes a centralized database to hold all your product line. This means that all your users will have access to the same set of products, and you don't need any database knowledge to set up PlanogramBuilder.

Typically, one or a few designated power user(s) in your company (*PlanogramBuilder Administrators*) manage(s) the product database. The other users (*Standard Users*) can only create, edit and publish planograms. See the differences in [User Roles](#).

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



Schematic representation of the PlanogramBuilder solution

1. PlanogramBuilder administrator(s)
2. Internet
3. Product database
4. PlanogramBuilder standard users

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

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

Learning and support

This section explains how to learn PlanogramBuilder and get assistance.

Learning material

The following material will help you learn to use PlanogramBuilder.

Help

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

- Keyboard shortcut: **F1**

Its sections are organized to reflect the main tasks and panes of the user interface.

It also contains step-by-step instructions and illustrations when necessary.

The user guide includes chapters on all the features available in the application, so it is our most complete source of information.

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

Each section can also be printed out individually should you want to keep a paper reference for more complex features (**Print current topic**).

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

Tutorials

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

There are also **video tutorials** on PlanogramBuilder YouTube channel:

<https://www.youtube.com/user/zVisuel>. These video tutorials can also be opened directly from within the application by clicking on **Tutorials**.

Tip: the video tutorials are in English, but you can activate the YouTube closed captions and auto-translations to see the voice overlay in your language.

Tooltips

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

FAQ

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

User support

If you are stuck with using some feature or have a question, we will gladly assist you.

If you purchased through a reseller providing support, please contact him directly for assistance in your language. You can check in [our reseller list](#) if your reseller provides support.

If you purchased through zVisuel or if your reseller doesn't provide support, you can contact us directly in English or in French.

Email

Email support is free, and we usually reply to your messages within the next business day.

planogrambuilder@zvisuel.com

Phone

Phone support is available at standard rates on weekdays between 9 h – 12 h and 14 h-17 h, GMT+1 (Switzerland).

+41 (0)21 311-52-53

Remote session

zVisuel can connect to your computer to assist you through a real time support session. Please first call or email us to if you think you need remote assistance.

[Download the remote support client application](#) only if you are asked to do so by our support team.

Installation and launch

This section explains system requirements, user roles, installation and launching PlanogramBuilder.

System Requirements

Microsoft Windows

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

Mac OS x or other operating systems

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

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

for Intel chips:

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

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

for Apple M1 / M2 chips:

If your Mac has a newer non-intel CPU (M series), there are fewer solutions and there are limitations (see [Program Compatibility Troubleshooter on Arm | Microsoft Learn](#)):

- *UTM* (<https://mac.getutm.app/>). Free license.
- *Parallels Desktop* (<https://www.parallels.com/>).
- *VMware Fusion* (<https://www.vmware.com/products/fusion.html>).

You can see a comparison of the 3 above solutions here for example: [Windows 11 ARM on Mac? Parallels vs VMware vs UTM - YouTube](#)

Parallels is the officially supported method, but is not free.

If you want to try UTM, there is an install video tutorial here for example: [Install x86 x64 Windows 10 on an M1 or M2 Mac - YouTube](#)

Note: the requirements for the Operating System and the display are the same as listed for [Microsoft Windows](#).

User Roles

PlanogramBuilder allows choosing between two distinct roles to assign to each user, each role with different access rights to the application features.

Notes:

- If your company has purchased a license for one user only, there is no choice of user role, so you don't need to read this section further. (the user is automatically a *PlanogramBuilder Administrator*.)
- If your company has purchased a license for more than one user, you will be asked by email which user role to assign per user. You can also write at any time to planogrambuilder@zvisuel.com to request changing the role of one or more users.

Please see below a description of each user role:

Standard User

You should assign this role to users who don't manage the product database and don't need to manage planogram projects created by other users.

Standard users have access to standard planogramming features:

- [Launch PlanogramBuilder](#)
- Create planograms: [New \(Projects\)](#)
- [Create bays](#), [Modify bays](#) (if allowed by an administrator)
- Place their [Products](#) on shelves
- Place their [Accessories](#) on shelves
- [Save](#) their planograms
- [Publish](#) their planograms
- [Inserting templates into a planogram](#)
- Open their colleagues' planograms (if allowed by an administrator in [Shared projects](#))
- Set various preferences in [Settings affecting the current user only](#)

PlanogramBuilder Administrator

You should only assign this role to one or a few managing users in your company.

PlanogramBuilder Administrators can manage the database, the planograms of all users and company-wide settings:

- Manage the database
 - [Clear DB](#)
 - [New item](#)
 - [Item properties](#)

- Delete (database item)
 - Import list + images
 - Export list + images
- Manage all projects
 - Create Template
 - Backup all projects
 - Restore all projects
- Settings affecting all users
 - Interface customization
 - Database configuration
 - User rights settings

For example:

When a *PlanogramBuilder Administrator* adds a product to your PlanogramBuilder database, this product instantly becomes available to all users of your company for planogramming.

When a *PlanogramBuilder Administrator* changes the logo of your company in PlanogramBuilder, it applies to all other users.

Install PlanogramBuilder

This section explains how to download and install PlanogramBuilder latest release.

Normal installation

Video tutorial on this topic: [1: Installing PlanogramBuilder](#)

This is the suggested and standard setup method for most users.

1. **Close PlanogramBuilder** if you already have a version opened. If you are updating PlanogramBuilder, you don't need to uninstall the old version: simply follow the next steps; you will also retain all your data.
2. **Download the installer:** click on the following link or paste the link in your web browser address field: <https://planogrambuilder.zvisuel.com/downloads/PlanogramBuilderSetup.exe>
3. **Run the installer** after it has been downloaded.
4. Different options will be presented to you depending on the following:
 - If you install PlanogramBuilder for the first time, you must choose an installation mode:
 - **Install for all users:** this installs the application for all Windows users on the computer. This choice requires Windows administrator privileges. If you are a standard Windows user, you must ask your IT to enter a Windows administrator password.
 - **Install for me only:** this installs the application for the current Windows user only. This installation normally doesn't require Windows administrator privileges. Your organization may however prevent you from installing applications, in which case you will have to ask your IT to perform the installation.
 - If you are updating PlanogramBuilder from an older version, the installation mode is determined automatically based on the mode in which the previous version was

installed. As a standard Windows user, you may have to ask your IT to enter a Windows administrator password. You may also be prompted to uninstall the previous version of PlanogramBuilder as a Windows administrator and re-launch the installation to proceed with the update.

5. Then, follow the on-screen instructions until installation is completed.

Notes:

- You will retain all your planograms and settings after reinstalling PlanogramBuilder.
- If you are updating PlanogramBuilder from a previous version, you may be prompted to uninstall the previous version and re-launch the installation to proceed with the update.

Unattended installation

This setup method is convenient for IT managers who must install PlanogramBuilder remotely.

1. **Close PlanogramBuilder** if you already have a version opened. If you are updating PlanogramBuilder, you don't need to uninstall the old version: simply follow the next steps; you will also retain all your data.
2. **Download the installer and save it to your hard drive:** click on the following link or paste the link in your web browser address field:
<https://planogrambuilder.zvisuel.com/downloads/PlanogramBuilderSetup.exe>
3. **Run the installer** with the following choices of command line parameters:
 - In all cases, you must use either one of these arguments:
 - **/SILENT**: the wizard and the background window are not displayed. The installation progress window and any error messages during installation are displayed. Example: *PlanogramBuilderSetup.exe /SILENT*
 - **/VERYSILENT**: the wizard, the background window and the progress window are not displayed. Error messages during installation are displayed. Example: *PlanogramBuilderSetup.exe /VERYSILENT*
 - For the first installation only, you must use one of the following arguments to avoid displaying the interactive dialog to Select the install mode:
 - **/ALLUSERS**: this installs the application for all Windows users on the computer.
 - **/CURRENTUSER**: this installs the application for the current Windows user only.
 - In all cases but optionally, you can use **/ACCOUNTID** for the installer. This lets you enter your account ID at installation, so the users won't need to enter it when they run PlanogramBuilder. Use the PlanogramBuilder accountID which you received by email after registering a trial version or ordering a commercial version. Format: */ACCOUNTID=[your accountid]*

Example:

PlanogramBuilderSetup.exe /VERYSILENT /ALLUSERS /ACCOUNTID=goodcompany_ihrpz437

Notes:

- The parameters are not case sensitive.
- If the target session has no Windows administrator rights, the main installer will have to escalate the privilege to administrator before this call to avoid the dialog asking for administrator credentials.
- You will retain all your planograms and settings after reinstalling PlanogramBuilder.

- If you are updating PlanogramBuilder from a previous version, you may be prompted to uninstall the previous version and re-launch the installation to proceed with the update.

Update PlanogramBuilder

PlanogramBuilder is updated on a regular basis to bring improvements. You can see the list of improvements in [What is new in version 48](#).

When an update is required, you will be notified when launching PlanogramBuilder. You must then proceed to install the update as instructed in [Install PlanogramBuilder](#).

Note: you will retain all your planograms and settings after reinstalling PlanogramBuilder.

Launch PlanogramBuilder

Once installation is complete, you can run PlanogramBuilder:

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



2. **Enter your account ID, user name and password** as provided to you by email after purchase or registration.

A screenshot of the PlanogramBuilder application window. The window has a title bar with the text 'PlanogramBuilder' and standard Windows window controls (minimize, maximize, close). The main area contains three input fields: 'Account ID:' with the value '12354647hj', 'User Name:' with the value 'myUserName', and 'Password:' with masked characters (dots). Below these fields is a 'Log In' button.

3. Click on **Log In**.

Notes:

- You need to be connected to the Internet when using PlanogramBuilder since the database is online and most functions work with dynamic content.
- Please refer to [Connection error](#) if you see such a message.
- By default, your login credentials are automatically remembered for subsequent use of PlanogramBuilder. If you prefer entering your login information every time you launch the application, consult [Save user & password](#).

Command line parameters

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

Video tutorial on this topic: [3: Startup settings](#)

accountID

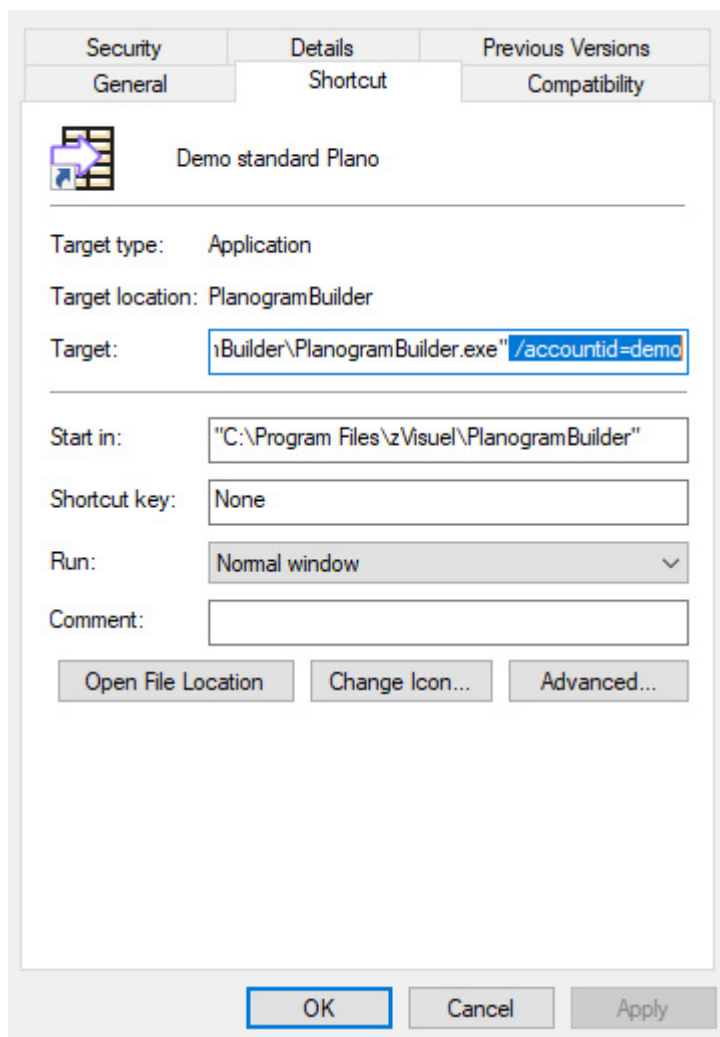
This parameter lets you predefine an accountID to use when launching PlanogramBuilder. This option is useful mostly if you use several distinct PlanogramBuilder accountIDs. You can create several copies of PlanogramBuilder shortcut and assign a different accountID to each shortcut, so you will be able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

- Supported values: any valid accountID can be used as value for this parameter.
- Format: `/accountID=value`
- Example: `PlanogramBuilder.exe /accountID=goodcompany_ihrpz437`

Note: This parameter is not case sensitive.

Instructions:

1. *Right-click* on the **PlanogramBuilder shortcut**.
2. In the *context menu*, click **Properties**.
3. In *Properties > Shortcut > Target*, type the parameter after the application path.



4. *Click* **OK** to save your changes.
5. Now *click* on the **shortcut icon** to start PlanogramBuilder using your parameter.

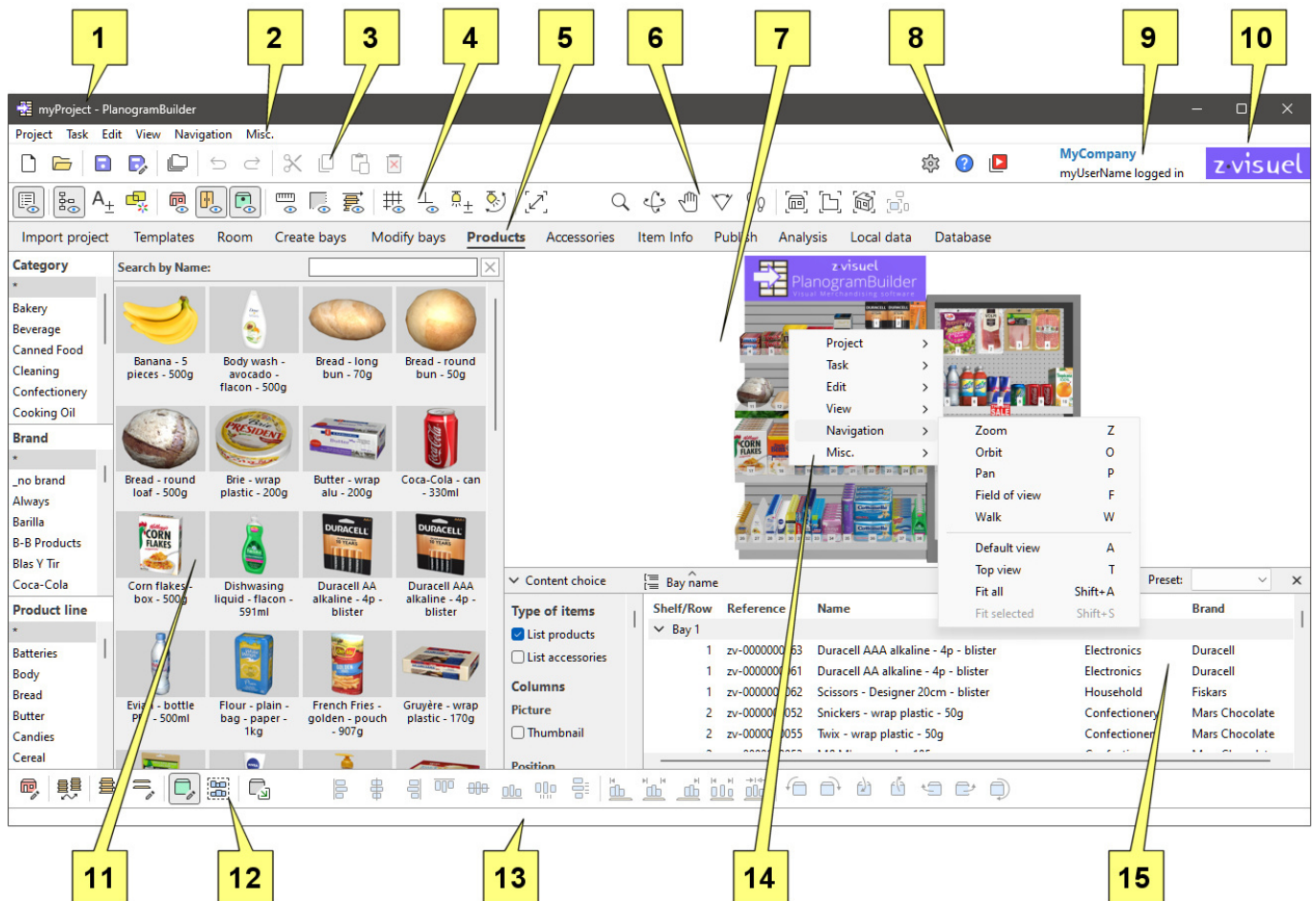
Getting started

This is an introduction to using PlanogramBuilder.

It is very recommended to read this whole section.

Screen Layout

Here is an overview of the PlanogramBuilder user interface:



1. The name of the opened project. Consult [Name \(Project properties\)](#).
2. [Top Menu](#): the Main Menu accessed from the top menu bar.
3. Toolbar with [Project commands \(main window\)](#) and [General edit commands](#).
4. Toolbar to set planogram display modes. Consult [View](#).
5. Tabs to select [Tasks](#) for planogramming.
6. Toolbar to navigate in Visualization area. Consult [Tools and commands \(Navigation\)](#).
7. [Visualization area](#): the visual representation of your planogram
8. Toolbar to access [Settings](#), [Help](#) and [Tutorials](#).
9. [Application title](#) and username.
10. [Application logo](#).

11. [Pane of current task](#): task-specific parameters and information
12. Toolbar to edit the various types of objects in the opened planogram: [Room](#), [Create bays](#), [Modify bays](#), [Products](#) and [Accessories](#).
13. Status bar: typically showing progress of an operation such as uploading.
14. [Context menu \(visualization area\)](#): the Main Menu accessed from a right-click.
15. [Project item list](#): the list of items in your opened planogram project.

The main elements of the application interface are described below:

Visualization area

The visualization area is where you see the planogram visual representation.

Note that you can also view the contents of your project as a list in [Project item list](#).

Tip: this area can be resized by grabbing and dragging its borders with the mouse.

Tasks

The application is organized in several tasks, accessible from the task tabs. Each task has its own content related to a specific planogramming task, for example working with shelving or managing your product database.

Pane of current task

The pane for the current task is located on the left of the screen.

It includes task-related parameters and information which vary depending on the current task and the selected elements.

Some task panes also include a specific toolbar related to the task at hand.

Tip: most panes can be resized by grabbing and dragging their borders with the mouse.

Toolbars

There are several toolbars on the work screen. Most toolbars are displayed in all tasks so you can always edit your planogram. Each toolbar contains buttons for tools, commands and/or toggles to work on Planograms.

Toolbar buttons

Each button is shown as:

- an icon illustrating its purpose
- an optional text caption under the icon (consult [Display icon captions](#))

Note: If you have a low-resolution screen or if you have set a high display scale in Windows, displaying the captions may prevent all the buttons to fit on your screen. In such case, some toolbars become scrollable to give access to the hidden buttons, but we rather advise turning off captions for ideal comfort.

Tip: Hover your mouse cursor over any button to display a tooltip with:

- its name
- its description

- its keyboard shortcut when applicable

Main Menu

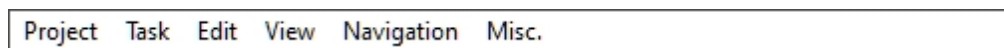
The main menu gives access to tools and commands organized by theme.

The content of the menu reflects the content of the toolbars.

You can access the main menu with two methods, both with the exact same menu items:

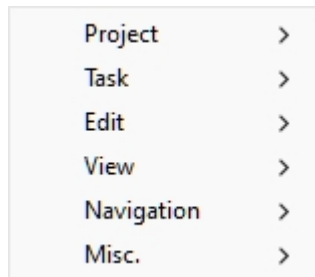
Top Menu

This menu is located on the top of the application window and displayed as a menu bar with its first-level sections always visible.



Context menu (visualization area)

This menu is displayed by right-clicking within the visualization area. It contains exactly the same submenus and entries as Top Menu.



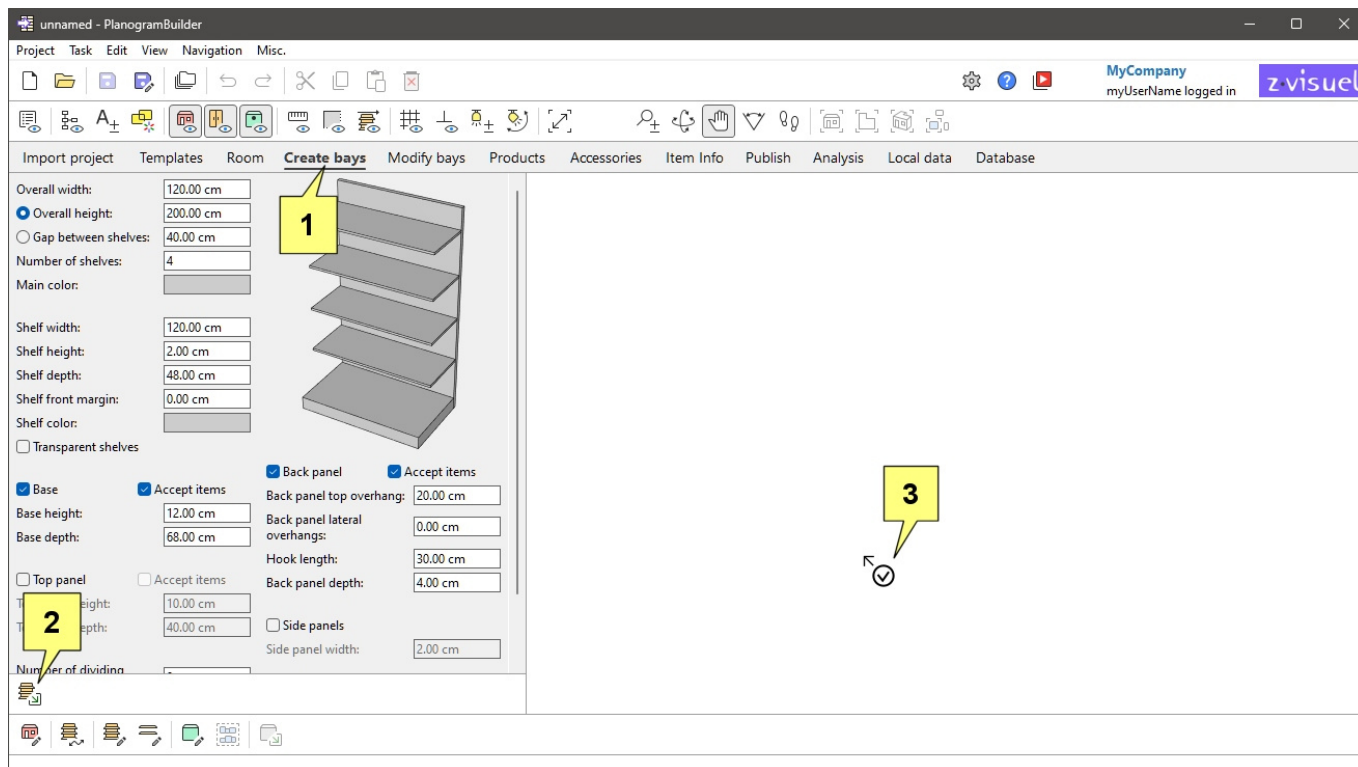
Note: there are some other context menus which you can access in some tasks and panels. These are described in their corresponding chapters.

Place Your First Product

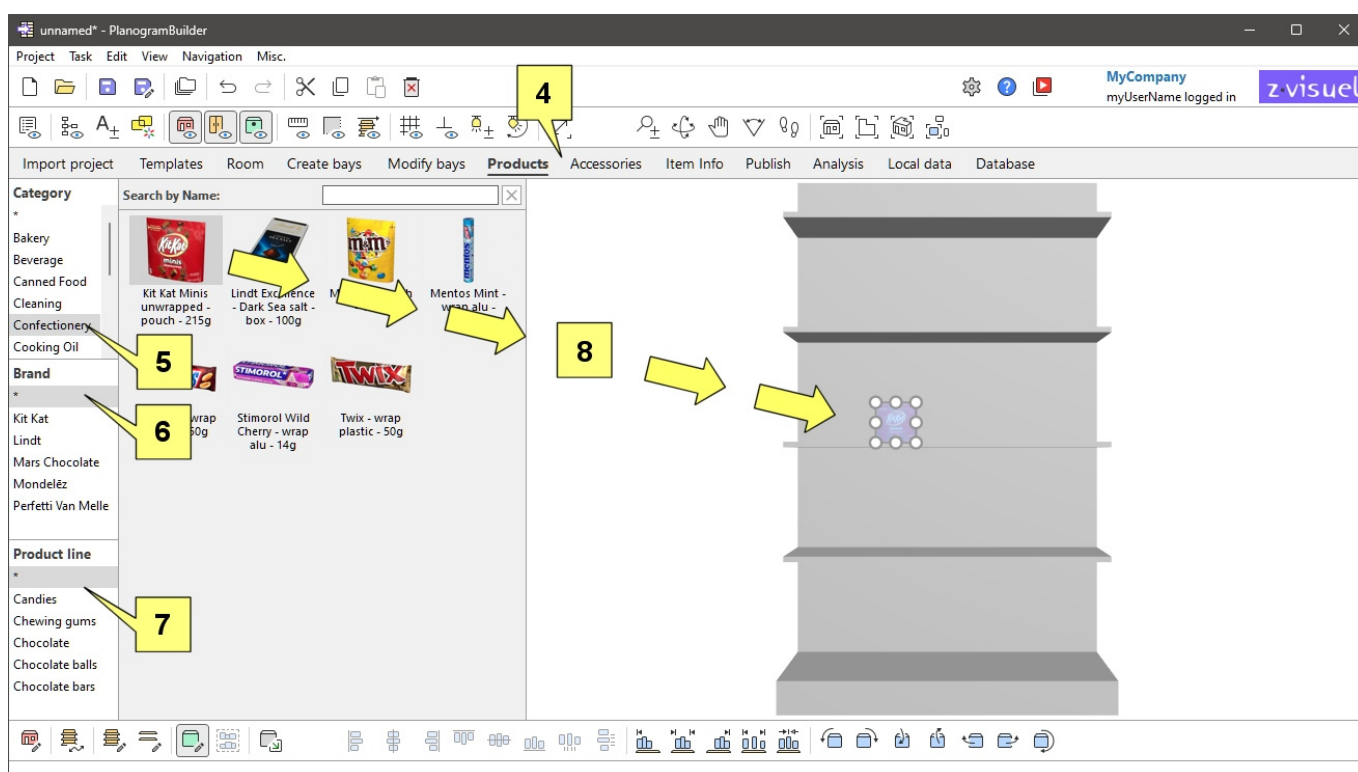
A set of sample products and accessories is provided with PlanogramBuilder. This lets you test the application without having to add your own products.

To create your first planogram:

1. After logging-in, click on the task named **Create bays**.
2. Click on **Insert the bay** to place the new shelf unit in your planogram. (You will learn later how to customize shelving.)
3. Place your mouse cursor (shown as a specific insertion cursor) in the visualization area where you want to add the cabinet. Click the left mouse button to confirm and create the cabinet.



4. After the shelf unit has appeared, click on the task named **Products**.
5. On the left of the screen in the hierarchical list, under **Category**, click on **Confectionery**.
6. Under **Brand**, click on **asterisk (*)** to display all of them.
7. Under **Product line**, click on **asterisk (*)** to display all of them.
8. Press and hold your mouse cursor over a product thumbnail in the catalogue, then **Drag & drop** the product onto a shelf in the visualization area. (You will learn later how to use your own products.)



9. You can now try to add more products and rearrange them on the shelves with the mouse.

Experiment with a sample planogram

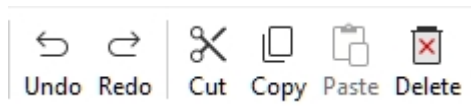
A project example is also provided with PlanogramBuilder for further testing:

1. Click on **Open** in the upper toolbar.
2. Select the project named ***sample planogram***.
3. Click on **Open** in the lower toolbar.
4. This project is now opened.
5. Use the tools of Navigation:
 - o [Zoom](#)
 - o [Pan](#)
 - o Etc.
6. Try to modify the planogram by moving, adding and removing shelves, products and accessories.

Learn basic commands

General edit commands

This toolbar includes standard editing commands applicable to various objects in a planogram:



These are also available in [Main Menu](#) > **Edit**:

Undo	Ctrl+Z
Redo	Ctrl+Y
Cut	Ctrl+X
Copy	Ctrl+C
Paste	Ctrl+V
Delete	Delete
Edit room elements	R
Free bay placement	
Edit bays	B
Edit bay components	S
Edit products and accessories	I
Select all products	Ctrl+A
Align and space	>
Rotate products	>
Insert generic product	N
Fit width to bay	

Undo (Edit)

Reverse one or several of your previous actions.

PlanogramBuilder supports multiple undo of planogram editing operations.

You can also undo text typed in text boxes when the mouse cursor is within the text box.

- Keyboard shortcut: **Ctrl + Z**

Redo (Edit)

Re-apply operations that were canceled by [Undo \(Edit\)](#).

PlanogramBuilder supports multiple redo actions of planogram editing operations.

You can also redo text typed in text boxes when the mouse cursor is within the text box.

- Keyboard shortcut: **Ctrl + Y**

Cut (Edit)

Remove the selected items and put them on the Clipboard.

- Keyboard shortcut: **Ctrl + X**

Note: This command only applies to products and accessories.

Tip: You can cut items from the current project, then open another project and paste the items there.

Copy (Edit)

Put a copy of the selected items on the Clipboard.

- Keyboard shortcut: **Ctrl + C**

Note: This command only applies to products and accessories.

Tip: You can copy items from the current project, then open another project and paste the items there.

Paste (Edit)

Insert items from the Clipboard in your project.

- Keyboard shortcut: **Ctrl + V**

Instructions:

1. Click on this command.
2. Place your mouse cursor in the visualization area. Move your mouse over the shelf or the back panel where you want to paste the items. The cursor changes to indicate that you can paste here.
3. Click on the exact desired location to paste the item.

Note: This command only applies to products and accessories.

Tip: You can copy items from the current project, then open another project and paste the items there.

Delete (Edit)

Delete the selected objects in the current project.

- Keyboard shortcut: **Delete** key

Note: Deleting shelving also deletes products and accessories which are placed thereon.

Delete the sample data

Once you have finished testing and learning, you probably won't need the sample project and items any more. To remove them from your account before adding your own products, proceed as follows.

Delete the sample projects

Proceed as follows to remove all sample projects from the database:

1. Log into PlanogramBuilder with a username who is [PlanogramBuilder Administrator](#).
2. Click on [Settings](#).
3. Set [Shared projects](#) to the value: **Administrators only**.
4. Close **Settings**.
5. Click [Manage](#) in the upper toolbar.
6. Click on [Backup](#) in the lower toolbar to backup all projects in case you want to recover the sample projects later. Choose where to save the backup file.
7. Select the project named **sample planogram**.
8. Uncheck the checkbox [Locked \(Project properties\)](#).
9. Click on [Apply \(Project properties\)](#).
10. Click on [Delete \(project\)](#) in the lower toolbar to delete this project.
11. Repeat steps 7 to 10 for the project named **sample empty bay**.

12. You can now reset [Shared projects](#) to **Disabled** if you wish.

Delete the sample items

Proceed as follows to remove all sample items from the database:

1. Log into PlanogramBuilder with a username who is [PlanogramBuilder Administrator](#).
2. **Important:** back-up the sample database with [Export list + images](#).
3. Empty the database with [Clear DB](#).

If you had previously added some of your own products to the database, additionally perform these steps to recover your own products only:

4. Make a copy of the exported Excel file created at step 1 (to keep as a backup).
5. Open the exported Excel file created at step 1.
6. Delete all the rows which correspond to zVisuel sample items (all items with ZV prefix in the reference column).
7. Save the Excel file.
8. Import the Excel file with [Import list + images](#).

Next learning steps

Once you have tested PlanogramBuilder with our sample items, you can start working with your own products and fixtures.

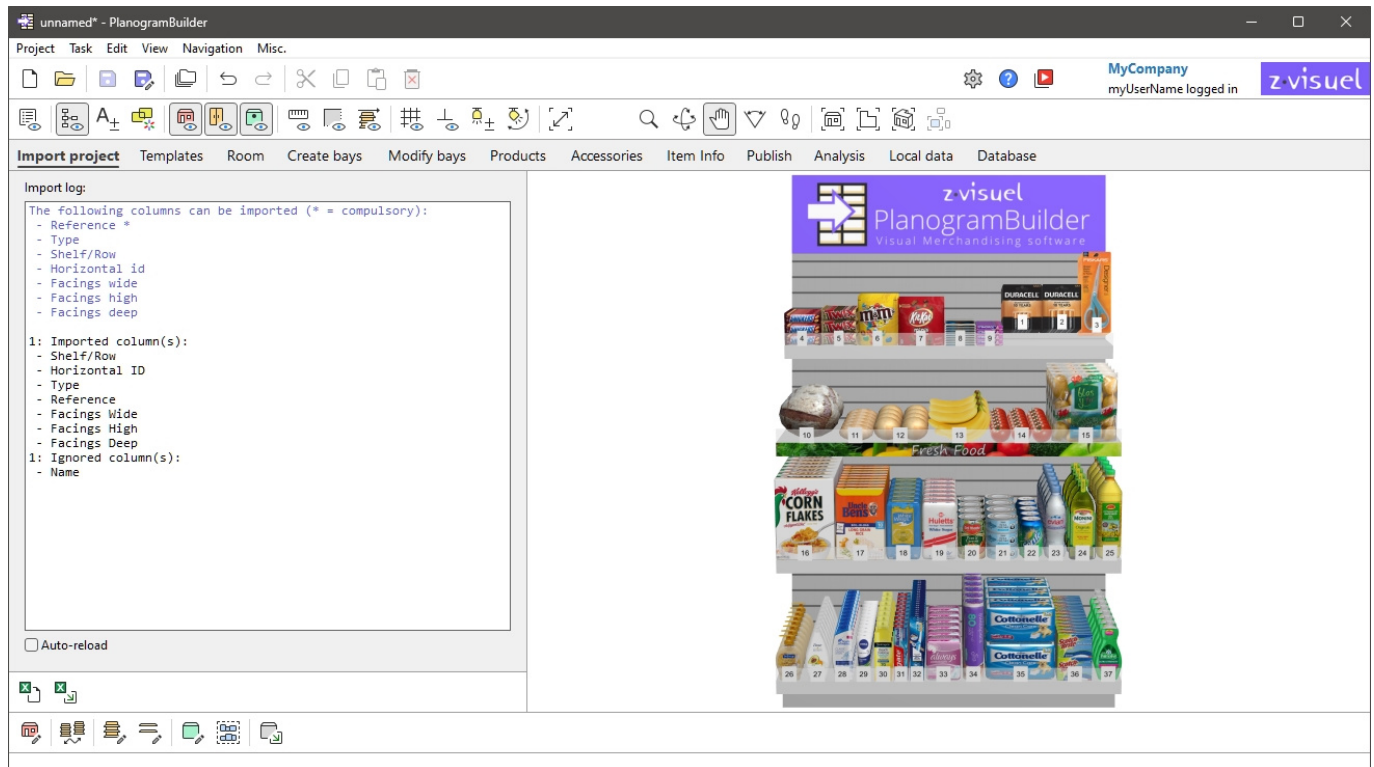
We advise you to proceed in the following order:

1. Set regional parameters for the application if not already done ([Language](#), [Measurement unit](#)).
2. Personalize the application look ([Application title](#), [Application logo](#)).
3. Configure your database ([Item classification properties](#), [Item custom properties \(Settings\)](#)).
4. Learn how to add your own products and accessories ([Database](#)).
5. Work with shelving ([Create bays](#), [Modify bays](#))
6. Navigate in the planogram viewing area ([Navigation](#)).
7. Place items on shelves ([Products](#), [Accessories](#), [Item Info](#)).
8. See your planogram content as text ([Project item list](#)).
9. Control the look and the content of your planograms displayed on screen ([View](#)).
10. Manage planograms ([Projects](#)).
11. Output your planograms as PDF, Excel, etc. ([Publish](#)).
12. Finally, explore more advanced features, such as:
 - o [Templates](#)
 - o [Room](#)
 - o [Analysis](#)
 - o [Import project](#)

Import project

This task lets you generate a visual planogram automatically from a listing of products and accessories defined in a spreadsheet application such as Microsoft Excel.

Tip: This is an advanced feature which we advise to try only after being familiar with other PlanogramBuilder tasks, starting with [Getting started](#), then [Next learning steps](#).



This feature provides two basic methods to place the products and accessories listed in the Excel file:

Place the items onto a predefined bay (an empty bay previously saved as a project).

Let PlanogramBuilder automatically create a suitable bay to place the items.

Note that each Excel file can only contain a list of products and accessories to place in a single bay. You can however load multiple files successively to fill multiple bays in the same planogram.

Here is a typical workflow to import a project from a spreadsheet into PlanogramBuilder.

1. If you wish to use a predefined bay, create an empty bay with the desired dimensions in PlanogramBuilder. Save the empty bay as a project.
2. Open your spreadsheet application and create a new sheet referencing all the items you want to import. Save the file in *.x/s or *.x/sx format.
3. In PlanogramBuilder task: Import project, import the list of items with [Tools and commands \(Import project\)](#).
4. Verify that your imported data is correct in [Import log \(Import project\)](#).

Source file (Import project)

A file with the list of products and accessories to place in the project.

The list can contain all or a subset of the products in your database, each listed by [Reference](#). Products not found in your database are disregarded.

Supported file formats: Microsoft Excel (*.xls or *.xlsx)

Example file: you can download an example of a valid file containing a list of the sample products in PlanogramBuilder: [sample_files/import_project/import_project_sample_source_file.xlsx](#)

Shelf/Row	Horizontal ID	Type	Reference	Name	Facings Wide	Facings High	Facings Deep
		project	sample empty bay for project import				
		placement	fill width				
		spacing					
		shelf tool	zv-0000000065	PlanogramBuilder Header - board - 100cm			
1	1		zv-0000000052	Snickers - wrap plastic -	1	3	auto
1	2		zv-0000000055	Twix - wrap plastic - 50g	1	3	auto
1	3		zv-0000000053	M&M's - pouch - 185g	1	1	auto
1	4		zv-0000000064	Kit Kat Minis unwrapped -	1	1	auto
1	5		zv-0000000056	Lindt Excellence - Dark S	1	13	auto
1	6		zv-0000000060	Stimorol Wild Cherry - wr	1	5	auto
1	7		zv-0000000061	Duracell AA alkaline - 4p	1	1	auto
1	8		zv-0000000063	Duracell AAA alkaline - 4p	1	1	auto
1	9		zv-0000000062	Scissors - Designer 20cm	1	1	auto
2	1	shelf tool	zv-0000000067	Shelf strip - Fresh Food - card strip - 100cm			
2	2		zv-0000000005	Bread - round loaf - 500g	1	1	auto
2	3		zv-0000000006	Bread - long bun - 70g	1	1	auto
2	4		zv-0000000007	Bread - round bun - 50g	2	1	auto
2	5		zv-0000000009	Banana - 5 pieces - 500g	1	1	auto
2	6		zv-0000000010	Tomato - 1 piece - 100g	3	1	auto
2	7		zv-0000000011	Patato - pouch - 2kg	1	1	auto
3	1		zv-0000000041	Corn flakes - box - 500g	1	1	auto
3	2		zv-0000000042	Rice - long grain - box - 1	1	1	auto
3	3		zv-0000000039	Flour - plain - bag - paper	1	1	auto
3	4		zv-0000000038	Sugar - white - bag - pap	1	1	auto
3	5		zv-0000000044	Peas and carrots - can -	1	1	auto
3	6		zv-0000000043	Tuna chunks in water - c	1	3	auto
3	7		zv-0000000001	Coca-Cola - can - 330ml	1	1	auto
3	8		zv-0000000004	Evian - bottle PET - 500ml	1	1	auto
3	9		zv-0000000020	Oil - olive - bottle - 1l	1	1	auto
3	10		zv-0000000019	Oil - rapeseed - bottle PET	1	1	auto
4	1		zv-0000000035	hand soap - liquid - flacor	1	1	auto
4	2		zv-0000000031	Body wash - avocado - f	1	1	auto
4	3		zv-0000000047	Shampoo - Classic clean	1	1	auto
4	4		zv-0000000048	Hand cream - Soothing ca	1	1	auto
4	5		zv-0000000050	Sunscreen - Beach Defen	1	1	auto
4	6		zv-0000000032	Toothpaste - MaxFresh -	1	1	auto
4	7		zv-0000000049	Toothbrush - Pro-Flex so	1	1	auto
4	9		zv-0000000034	Sanitary napkins - box - 3	1	1	auto
4	10		zv-0000000046	Make-up pads - bag - 80	1	1	auto
4	11		zv-0000000037	Toilet paper - Cottonelle -	1	2	auto
4	12		zv-0000000045	Sponge - non-scratch - v	1	2	auto
4	13		zv-0000000033	Dishwashing liquid - flacor	1	1	auto

Example of a spreadsheet to import

Import Project Syntax

Notes:

Only the first sheet of your spreadsheet is considered for import.

All the parameters listed below are case insensitive.

Blank lines (empty reference cell) in input files are ignored.

General format (Import project)

Rows

In your spreadsheet, each row below the column headers corresponds to one element to import or to specify.

Columns

Your Excel sheet can contain various columns to specify the import parameters and values.

Compulsory columns:

- **Type:** Under this column header, each cell specifies the type of element on its row. A description of each type of supported element is available in [Supported elements \(Import project\)](#) for:
 - [project \(Import project\)](#)
 - [placement](#)
 - [spacing](#)
 - [Product \(Import project\)](#)
 - [Accessory \(Import project\)](#)
 - [space](#)
 - [section](#)
 - [section start](#)
- **Reference:** Under this column header, the cell for each row specifies the value of the item, for example the actual bay or product to import.

Optional columns:

Other columns can be added for some types of elements to further define the way they are imported. These are described below for applicable element types.

Supported elements (Import project)

project (Import project)

Optionally, create a row with this value under the column named *Type* to specify a saved project with an empty bay onto which the products and shelf tools will be placed upon import. This lets you place the products onto your own predefined bays.

Supported columns and values:

- Column: **Type**
 - Value: *project*
- Column: **Reference**

- Supported values: the name of the project spelled exactly as listed in [List of projects](#) > [Name \(Project properties\)](#).

Example:

Type	Reference
<i>project</i>	<i>sample empty bay</i>

Notes:

If you don't specify a project line in the Excel file or if the referenced project doesn't exist, the importer creates a generic bay automatically with dimensions fitting all the products and accessories listed in your spreadsheet.

Only one project can be referenced in each Excel file to import.

If several saved projects exist with the specified name, the imported uses the most recently saved project amongst those.

placement

Optionally, create a row with this value under the column named *Type* to specify the way products are distributed on shelves.

Supported columns and values:

- Column: **Type**
 - Value: *placement*
- Column: **Reference**
 - Supported values:
 - *center*: upon import, all items are placed as close to each other (also taking into account [spacing](#)) and centered laterally on the shelf.
 - *fill width*: upon import, all items are distributed with equal lateral spacing so as to fill the whole width of the shelf.
 - *left*: upon import, all items are placed as close to each other (also taking into account [spacing](#)) and pushed against the left edge of the shelf.
 - *right*: upon import, all items are placed as close to each other (also taking into account [spacing](#)) and pushed against the right edge of the shelf.
 - *empty*: leaving the cell value empty defaults to *center*.

Example:

Type	Reference
<i>placement</i>	<i>fill width</i>

Notes:

This parameter is only effective on shelves that contain only products. For shelves which also include accessories, the items are placed as if the value *left* was specified.

Only one row with the value of *placement* in the column named *Type* can be referenced in each Excel file to import.

When [spacing](#) is higher than the calculated space for *placement*, items are placed according to *spacing*. In this case if there is not enough room on the bay referenced in the project, some items may not be placed in the planogram.

spacing

Optionally, create a row with this value under the column named *Type* to specify the desired lateral gap between imported items.

Supported columns and values:

- Column: **Type**
 - Value: *spacing*
- Column: **Reference**
 - Supported values: positive number [0-9 and decimal point]. Enter the desired distance for spacing (according to [Measurement unit](#)). Enter 0 if you want your products adjacent.

Example:

Type	Reference
<i>spacing</i>	2.4

Notes:

Only one row with a value of *spacing* in the column named *Type* can be referenced in each Excel file to import.

You can also disregard this setting and automatically spread products on the shelf width with automatically spread on the shelf width using [placement](#) = *fill width*.

Product (Import project)

Create a row with this value under the column named *Type* to specify a product to import. (this is the default value if no type is specified on the row).

Supported columns and values:

- Column: **Type**
 - Value: *Product*
- Column: **Reference**
 - Supported values: [Reference](#) of a product existing in your database, spelled exactly as in [Item properties](#).
- Optional column: **Shelf/Row**
 - Supported values: positive number [1-9] specifying on which shelf or row of the bay to place the product. Notes:
 - Numbering starts from the top and ends at the lowest row or shelf of the bay.
 - Products with empty values are placed on shelves based on their row order in the Excel sheet, starting at the first (top) shelf and ending at the last (lowest) shelf, based on the available space on each shelf.
- Optional column: **Horizontal id**
 - Supported values: Positive number [1-9] specifying the order of the product from left to right on its shelf or row. Notes:
 - Each block of multiple same products counts as 1 Horizontal id.
 - For products with empty values, the horizontal order is determined by the respective order of their rows in the Excel sheet.
- Optional column: **Facings wide**

- Supported values: Positive number [1-9] specifying how many instances of the same product must be placed adjacent in width on shelf. A missing column or empty value defaults to 1.
- Optional column: **Facings high**
 - Supported values: Positive number [1-9] specifying how many instances of the same product must be stacked adjacent in height on shelf. A missing column or empty value defaults to 1.
- Optional column: **Facings deep**
 - Supported values:
 - positive numeric value [1-9] specifying how many instances of the same product must be placed adjacent in depth on shelf.
 - *auto*: with this value, the number of products in depth is automatically determined by the depth available on the shelf or peg.
 - Empty: a missing column or empty value defaults to *auto*.

Example:

Type	Reference	Shelf/Row	Horizontal id	Facings wide	Facings high	Facings deep
<i>Product</i>	<i>zv-0000000030</i>	<i>2</i>	<i>5</i>	<i>1</i>	<i>12</i>	

Note: Pegged products can be imported, but they require a physical shelf on the bay referenced in [project \(Import project\)](#). If there is no referenced project in your Excel file, shelves are automatically created for pegged products. Please note that you should delete these extra shelves after import. This won't remove the pegged products.

Accessory (Import project)

Create a row with this value under the column named *Type* to specify an accessory to import.

Supported columns and values:

- Column: **Type**
 - Value: *Accessory*
- Column: **Reference**
 - Supported values: [Reference](#) of an accessory existing in your database, spelled exactly as in [Item properties](#).
- Optional column: **Shelf/Row**
 - Supported values: positive number [1-9] specifying on which shelf or row of the bay to place the accessory. **Notes:**
 - Numbering starts from the top and ends at the lowest row or shelf of the bay.
 - Accessories with empty values are placed on the bay based on their row order in the Excel sheet, starting at the first (top) shelf and ending at the last (lowest) shelf, based on the available space on each shelf.
- Optional column: **Horizontal id**
 - Supported values: positive numeric value [1-9] specifying the order of the accessory from left to right on its shelf / row. **Note:** For accessories with empty values, the horizontal order is determined by the respective order of their rows in the Excel sheet.

Example:

Type	Reference	Shelf/Row	Horizontal id
Accessory	zv-0000000067	3	2

space

Create a row with this value under the column named *Type* to specify an empty gap between two items. This type of item doesn't need any value under the column named **Reference**. **space** is only taken into account by the importer if another line with **Type** = *placement* and **Reference** = *fill width* is present.

Supported columns and values:

- Column: **Type**
 - Value: *space*

Example:

Type
<i>space</i>

section

Create a row with this value under the column named *Type* to place a group of items defined within the same spreadsheet by *section start*. Typically, you can use sections to place groups of items which always belong together on the shelves.

Supported columns and values:

- Column: **Type**
 - Value: *section*
- Column: **Reference**
 - Supported values: text string referencing the name of the section to place. The name of the section must be defined in *section start*.
- Optional column: *Facings wide*
 - Supported values: positive number [1-9] specifying how many times **the entire section** will be placed adjacent laterally on shelf. A missing column or empty value defaults to 1.
- Optional column: **Facings deep**. This parameter only applies to **individual products** in the referenced section for which no *Facings deep* have been specified at the product level.
 - Supported values:
 - positive numeric value [1-9] specifying how many instances of the same product must be placed adjacent in depth on shelf.
 - auto*: with this value, the number of products in depth is automatically determined by the depth available on the shelf or peg.
 - Empty: a missing column or empty value defaults to *auto*.

Example:

Type	Reference	Facings wide	Facings deep
-------------	------------------	---------------------	---------------------

<i>section</i>	<i>Section1</i>	<i>1</i>	<i>5</i>
----------------	-----------------	----------	----------

Note: Horizontal id must be incremented for all items, including those defined within the section. This means that an item placed to the right of a section should have a value for *Horizontal id* which accounts for the number of products contained in the section. Remember however that *Horizontal id* is optional, so it is usually simpler to leave it blank and have items automatically be placed from left to right according to the Excel line order.

section start

Create a row with this value under the column named *Type* to define the content of a section (a group of items).

All items listed in the lines below *section start* become part of the group.

The end of the section group is defined by the line above the next *section start*, or by the end of the file if there is no *section start* below. This means you should always place *section start* definitions at the end of your file, below all other items that are not part of a section.

Supported columns and values:

- Column: **Type**
 - Value: *section start*
- Column: **Reference**
 - Supported values: text string defining the name of the section.

Example:

Type	Reference
<i>section start</i>	<i>Section1</i>

Here is an example of a file using a section:

Shelf/Row	Horizontal ID	Type	Reference	Name	Facings Wide	Facings High	Facings Deep
3			z.01.03.02.11	MaxiBot mean cyan	1	2	
3		section	section1		1		1
3			z.01.03.02.07	MaxiBot mean black	1	1	
		section start	section1				
			z.01.02.02.08	MidiBot mean white	1	3	
			z.01.02.02.09	MidiBot mean orange	2	4	2
			z.01.02.02.02	MidiBot mean blue	1	3	

In the above example:

- Section1* is **defined** at the end of the file with *section start* and 3 products listed below. The second product in the section will be placed twice in width.
- Section1* is **placed** on the bay with *section start* on shelf 3 at *Horizontal id* 2, in between z.01.03.02.11 and z.01.03.02.07.

Note: Horizontal id is incremented for all items including those defined within the section. In this case this means that the item to the right of the section should have a value of 5 for *Horizontal id* to account for the 3 IDs contained in the section. Remember however that *Horizontal id* is optional, so you can also leave it blank and have items automatically be placed from left to right according to the Excel line order.

Import log (Import project)

This area shows the following information:

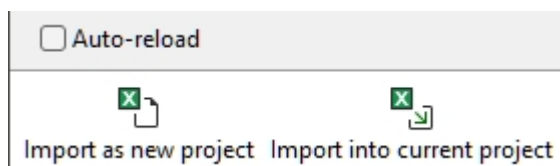
- In **blue** text, to help you prepare your input spreadsheet: list of supported columns
- In **black** text, once you've imported a file: list of imported and ignored columns.
- In **red** text, once you've imported a file: list of errors

```
Import log:
The following columns can be imported (* = compulsory):
- Reference *
- Type
- Shelf/Row
- Horizontal id
- Facings wide
- Facings high
- Facings deep

1: Imported column(s):
- Shelf/Row
- Horizontal ID
- Type
- Reference
- Facings Wide
- Facings High
- Facings Deep
1: Ignored column(s):
- Name
```

Tools and commands (Import project)

This toolbar includes tools and commands to import projects.



The importer provides three import modes suitable for various use cases, as described below.

Import as new project

Imports an Excel file one time as a new project.

Import into current project

Imports an Excel file one time and inserts the listed items in the current project. Use this command if you want to fill several bays in the same project.

Auto-reload

Toggles the automatic reloading of the source Excel file.

- Supported values:
 - *Checked*: PlanogramBuilder imports your Excel file as a new project every time you save the Excel file. This lets you edit your planogram in real-time in your spreadsheet application. PlanogramBuilder updates the visual result automatically. In this mode, [Import as new project](#) and [Import into current project](#) are disabled. Instead, a file selection box appears above [Import log \(Import project\)](#), where you can select the file to load which will persist.
 - *Not checked*: PlanogramBuilder doesn't reload the Excel file until the next time you click on Import as new project or Import into current project.
- Default value: *Not checked*

Tutorial (Import project)

In this section you will find instructions to test importing a project.

Note: this tutorial is designed to work with the sample projects, products and shelf tools delivered with PlanogramBuilder. If you have already deleted these sample items, you will need to modify the sample import file to use your own shelving and products.

Part 1

You will do a simple import from Excel to PlanogramBuilder.

1. Download the following file and save it on your desktop:
2. [sample_files/import_project/import_project_sample_source_file.xlsx](#)
3. Launch PlanogramBuilder.
4. Click on [Manage](#) to open the list of projects.
5. Verify in the list that you see a project named **sample empty bay**. If it's missing:
 - a. Download the following file and save it on your desktop:
[../common/sample_files/sample_empty_bay/sample_empty_bay.xlsx](#)
 - b. In PlanogramBuilder, under the project list, click [Restore](#).
 - c. Click **Ok** at the warning.
 - d. **Select** the downloaded file and click **Open**.
6. Click on the tab named [Import project](#) to access this task.
7. Click on [Import as new project](#) on the bottom toolbar to open the file dialog.
8. **Select** and **Open** the file you downloaded at step 1 (*project import sample input file.xls*)
9. Click **Yes** in the warning box if you need to save your current project, otherwise click **No**.
10. Wait for the import to take place and see the results in the visual area.

Part 2

Now you will modify the Excel file to import and see the resulting changes in real-time. You must complete [Part 1](#) of this tutorial before following this part.

1. In PlanogramBuilder, [Import project](#), check **Auto-reload**.
2. Click **No** in the warning box: you don't need to save the project imported at Part 1.
3. Click on **Browse, select** and **open** the file named *project import sample input file.xlsx*. You can already see the result of the import process in the visualization area.
4. Now launch your **spreadsheet application** and **open** the input file (*project import sample input file.xlsx*). *Tip*: Try to place PlanogramBuilder and your Spreadsheet application side-by-side on your screen or on two screens if you can. This will let you better see the results of changes you will bring.
5. In the spreadsheet, on line 3 ([placement](#)), change the value of **Reference** from **fill width** to **left**.
6. **Save** the Excel file. This will automatically update the placement of your items in PlanogramBuilder. You can see that all products are pushed to the left and there is some remaining space on the right of the shelves.
7. On line 21 (*zv-0000000010*), change the value of **Facings high** from **1** to **3** to stack more tomatoes.
8. Save the Excel file. This automatically updates the planogram layout in PlanogramBuilder according to the last changes made in *Excel*.
9. You can continue to test various changes in your spreadsheet, such as removing the line with **project** referencing **sample empty bay** to have a bay automatically generated instead.

Projects

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

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

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

Project commands (main window)

The toolbar on the main application window contains often used commands for projects. It is always visible in PlanogramBuilder:



These commands are also available in [Main Menu](#) > Project:

New	Ctrl+N
Open...	Ctrl+O
Save	Ctrl+S
Save as...	
Manage...	
Exit	Alt+F4

New (Projects)

This command creates and opens a new empty project.

- Keyboard shortcut: **Ctrl + N**

Use this command:

- When you want to start a new planogram project.
- To close an opened planogram project without exiting the application.

Note:

After creating a new project, PlanogramBuilder automatically activates a task typically used when starting a planogram:

- If you have not previously saved any [Templates](#) or if [Create bays](#) is already active, this task will be activated so that you can start adding new shelving.
- Otherwise, the task for [Templates](#) will be automatically activated, so that you can start dragging these to your new project.

Open

Opens the pane of [Project management](#) showing the list of projects available to open.

- Keyboard shortcut: **Ctrl + O**

You can close the pane with the **Cancel** button (or with **Esc** key, but only before using your mouse on any user interface element of the pane).

Save

Saves the opened project under its original name.

- Keyboard shortcut: **Ctrl + S**

Use this command to save your latest changes to an existing planogram project.

Note: This command is not available when saving a new project for the first time. In that case you must first use [Save as](#) to save and assign a name to your new project.

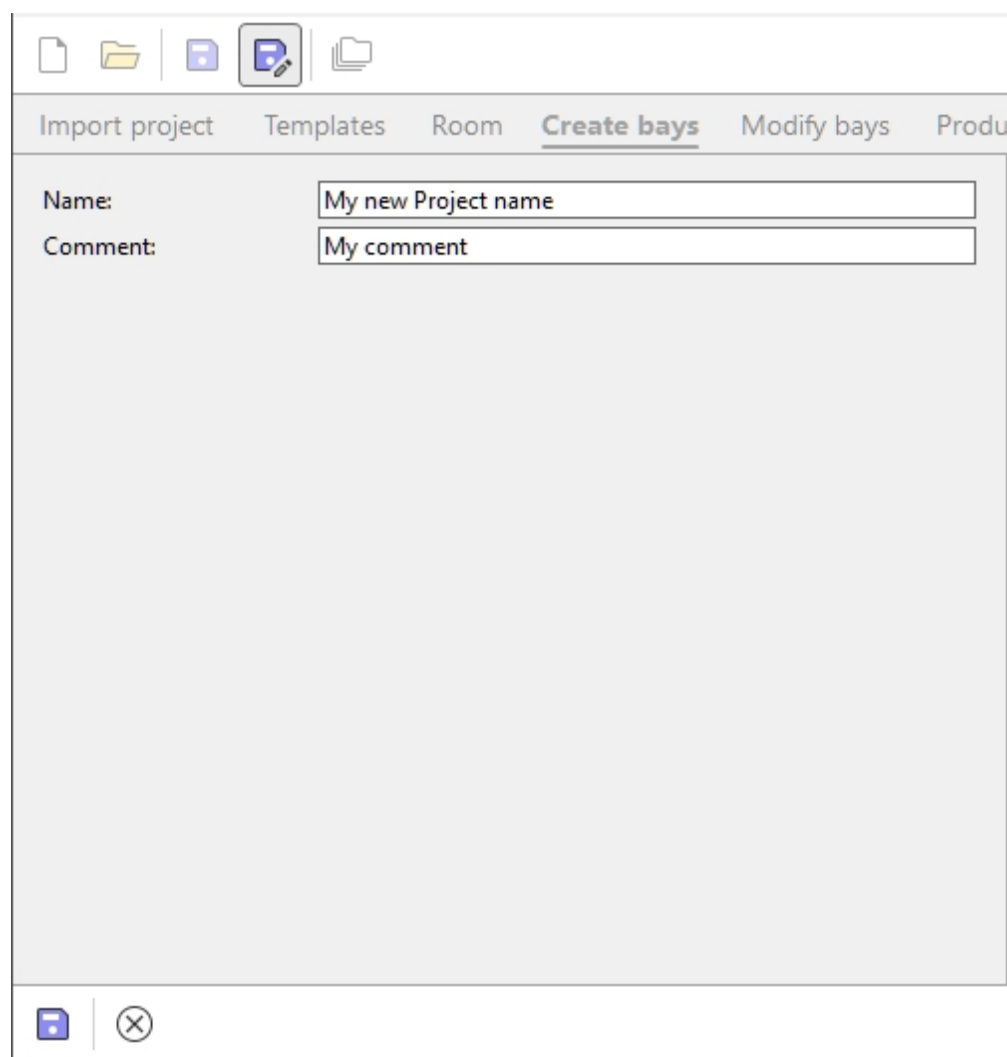
Tip: You can see if your current project has been modified since it was last saved by the asterisk (*) symbol appended to the project name in the upper toolbar (consult the image of [Screen Layout](#)).

Save as

Saves the opened project under a new name.

Use this command:

- To save and name a new (not yet named) planogram project.
- To save a copy of an existing project under a different name.



Instructions:

1. Open a project or create a new one.
2. Click on **Save as**.
3. Type a name for the project and optionally a comment (such as your client's name) in **Comment**.
4. Click on **Save** in the bottom toolbar or press **Enter** on your keyboard.
5. When the operation is complete, you will see a confirmation message in the bottom toolbar. The project automatically becomes available in the list of projects.
6. Once the current project has been saved, its new name appears at the top of the work screen.

You can close the pane with the **Cancel** button (or with **Esc** key, but only before using your mouse on any user interface element of the pane).

Manage

Opens the pane of [Project management](#) showing the list of projects available to manage.

Use this command to manage your existing projects (rename, delete, etc.).

Exit

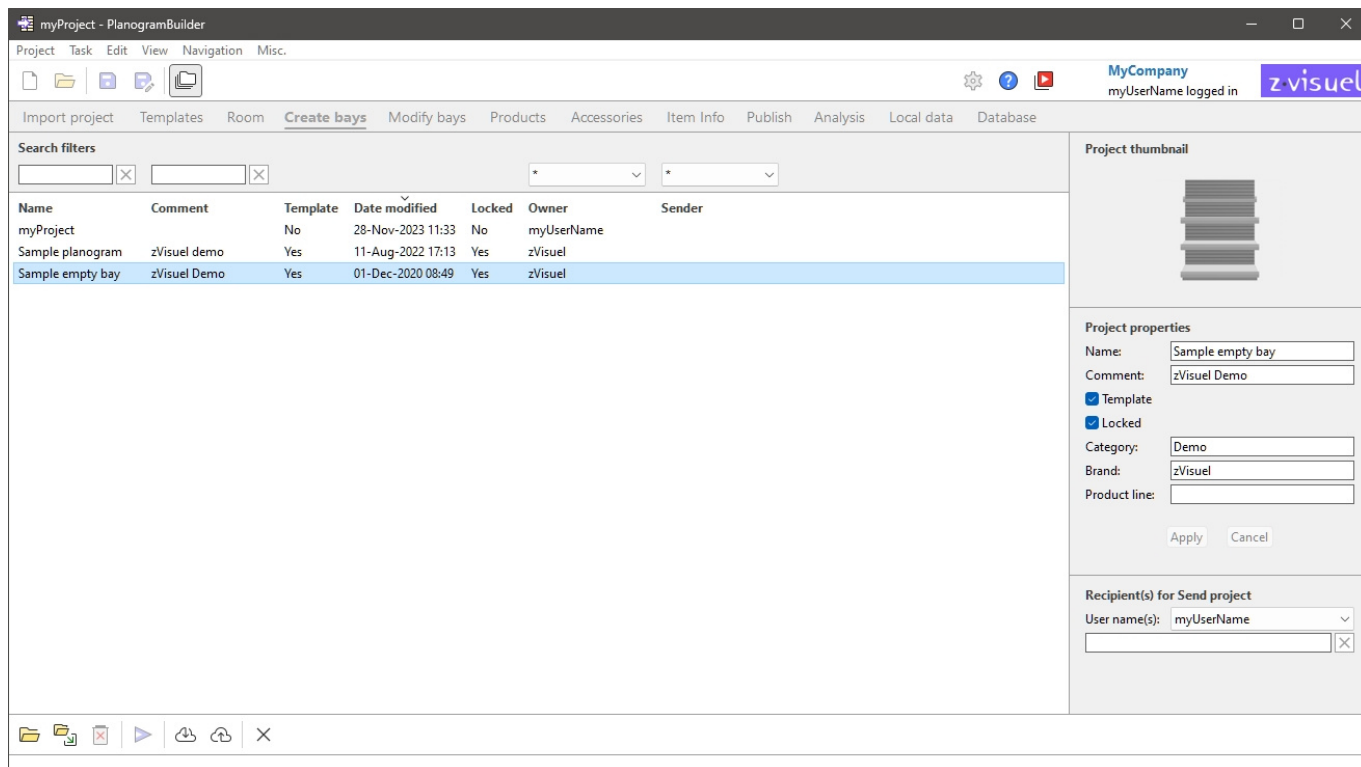
Closes PlanogramBuilder.

- Keyboard shortcut: **Alt + F4**

You can also close the application with the standard cross at the upper left corner of the window.

Project management

The project pane lets you access and manage all your saved projects.



There are 2 ways to open the pane of project management:

- Click on [Manage](#) in [Project commands \(main window\)](#) to open the project pane with all its management features enabled.
- Click on [Open](#) in [Project commands \(main window\)](#) to open the project pane with features limited to the following:
 - [List of projects](#)
 - Some commands for projects: [Open](#), [Insert \(project\)](#)
 - [Project thumbnail](#)

The Project pane features are described below.

List of projects

The list of projects displays all your projects.

Name	Comment	Template	Date modified	Locked	Owner	Sender
myProject		No	28-Nov-2023 11:33	No	myUserName	
Sample planogram	zVisuel demo	Yes	11-Aug-2022 17:13	Yes	zVisuel	
Sample empty bay	zVisuel Demo	Yes	01-Dec-2020 08:49	Yes	zVisuel	

There is one line per project and several columns showing various attributes of the projects:

- [Name \(Project properties\)](#)
- [Comment](#)
- [Template](#)
- **Date modified**: the date and time the project was last saved
- [Locked \(Project properties\)](#)
- **Owner** : the user who last saved the project
- **Sender** : the user who last sent the project to you. Consult [Send](#) for details on sending projects to the users.

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

- Display a specific page: click on one of the 10 visible page numbers.
- Display the previous or next page: click on the left or right arrows (shortcut keys: *Left / Right arrows*).
- Display the previous or next set of 10 pages: click on the left or right 3 dots.

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

Search filters

You can type keywords in the filter text fields to display only projects matching specific criteria. The text filters accept single or multiple keywords following these rules:

- Keywords are not case sensitive.
- Multiple keywords must be separated by spaces.
- Multiple keywords search for values containing all the keywords.
- The order of keywords doesn't matter.

There are also filters with drop-down lists which let you filter projects by owner and by Sender.

Example: type **Special campaign** in **Name** filter box to display all the projects containing special AND campaign in their name.

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

Note: The **Owner** column and filter are only visible when [Shared projects](#) is activated.

Project sorting

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

For example:

- To order the list by project names, click on **Name**.
- To order it by most recent modification dates, click on **Date modified**.

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

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

Project selection

You can select one or several projects in the list for further processing or to modify its / their properties.

To select 1 project:

1. Click on the desired project to select it in the list. It becomes highlighted.

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

To select multiple projects, there 2 methods:

- Method 1:
 - a. Click on a project in the list to select it.
 - b. Hold the **Ctrl** key and click on another project to select it.
 - c. Repeat the above step to select additional projects.
- Method 2:
 - a. Click on the first desired project in the list.
 - b. Hold the **Shift** key and click on the last desired project in the list.
 - c. All the projects listed from the first to the last one selected are also selected.
 - d. You can select additional projects using method 2.

To deselect projects:

1. Use the above methods to click again on the selected project(s) that you want to deselect.

Project thumbnail

When a single project is selected, a small preview of displayed to help you identify the project.



Project properties

The right side of the project management pane lets you view and edit the properties of the selected project(s).

Note: standard users (consult [Standard User](#)) can only change the properties of their own projects (those displaying your user name under **Owner** in [List of projects](#)). They can read the properties of all the listed projects. Administrators (consult [PlanogramBuilder Administrator](#)) can change the properties of properties even if they are not the owners.

Tip: If you have selected multiple projects, you can assign them the same values for any property. It is however not recommended to assign the same **name** to several projects.

A screenshot of the 'Project properties' dialog box. It has a title bar 'Project properties'. Inside, there are several input fields and checkboxes. The 'Name' field contains 'Sample planogram'. The 'Comment' field contains 'zVisuel demo'. There are two checked checkboxes: 'Template' and 'Locked'. The 'Category' field contains 'Demo'. The 'Brand' field contains 'zVisuel'. The 'Product line' field is empty. At the bottom, there are 'Apply' and 'Cancel' buttons.

Name (Project properties)

Sets the name of the selected project(s).

- Supported values: text, including Unicode characters for non-Latin text values
- Default value: the name you assigned when you saved the project with [Save](#) or [Save as](#).
- Example: *my best planogram*

Instructions:

1. Select one of your own projects in the list.
2. Enter or edit the value.
3. Click on [Apply \(Project properties\)](#) to apply your changes.

Note: standard users can only change the name of their own projects. They can still read the name of all the listed projects. PlanogramBuilder Administrators can rename projects even if they are not the owners.

Comment

Sets a comment about the selected project(s) (e.g., client name, internal version, etc.).

- Supported values: text, including Unicode characters for non-Latin text values
- Default value: none
- Example: *special Promo display*

Instructions:

1. Select one or several of your own projects in the list.
2. Enter or edit the value.
3. Click on [Apply \(Project properties\)](#) to apply your changes.

Note: standard users can only change the comment of their own projects. They can still read the comment of all the listed projects. PlanogramBuilder Administrators can edit the comment of any project even if they are not the owners.

Template

Toggles the selected project(s) as template.

Templates are a special type of projects which can be re-used as a basis for new projects or to combine into other planograms. They are especially useful for often-used empty rooms, empty shelving or guideline planograms. Template projects are accessible to all users in your company in [List of projects](#) and in [Template catalog](#) for easy drag and drop into any Planogram.

- Supported values:
 - Yes (checkmarked in the GUI): the project is a template.
 - No (not checkmarked in the GUI): the project is not a template.
- Default value: No (not checkmarked in the GUI)

Instructions:

1. Log in as **PlanogramBuilder Administrator**.
2. Select one or several of your own projects in the list.
3. Checkmark or uncheck **Template**.
4. Press [Apply \(Project properties\)](#) to apply your changes.

Notes:

- Only [PlanogramBuilder Administrator](#) can assign projects as templates.
- Only the template owner can modify and save an existing template project content. Non-owners can open templates belonging to another user, but they must save them under another project name ([Save as](#)). This prevents users from inadvertently changing the original template.

Locked (Project properties)

Toggles the selected project(s) as locked.

- Supported values:
 - **Yes** (checkmarked in the GUI): the project is locked. Use this to prevent modifying the project, for example once it has been finalized. Once locked:
 - **Save** is disabled for this project. It can still be opened, edited, and saved as a copy, but modifications cannot be saved over the existing project.
 - Nobody can [Delete \(project\)](#).
 - **No** (not checkmarked in the GUI): the project is not locked. It can be saved and deleted.
- Default value: *No* (not checkmarked in the GUI)

Instructions:

1. Select one or several of your own projects.
2. Checkmark or uncheck **Locked (Project properties)**.
3. Press [Apply \(Project properties\)](#) on the toolbar to apply your changes.

Notes:

- Standard users can normally only lock and unlock their own projects. PlanogramBuilder Administrators can lock and unlock any project even if they are not the owners.
- When [Shared projects](#) is activated, only [PlanogramBuilder Administrator](#) can unlock a project. Other users can't unlock it, even the original user who set the project as locked.

Project Classification Properties

Three fields let you optionally classify your projects.

Assigning classification values to Templates is useful to help users find them in [Template catalog](#) which reflects this classification.

Instructions:

1. Select one or several of your own projects.
2. Enter or edit the value.
3. Click on [Apply \(Project properties\)](#) to apply your changes.

Notes:

- The three available project classification properties are the same as for products. To change the default classification scheme, consult *Settings*, [Item classification properties](#).
- *Note:* standard users can only change these values for their own projects. PlanogramBuilder Administrators can change the values of any project even if they are not the owners.

Apply (Project properties)

Applies the changes made to the selected project in [Project properties](#).

You must press this button after you have made one or more modifications to project properties.

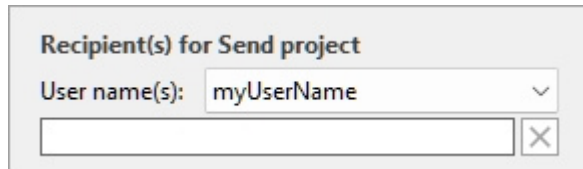
Note: updated values are only applied to projects and properties which the user has the right to change (consult [Project properties](#)). Other projects and values are left unchanged.

Cancel (Project properties)

Cancels any change made to Project properties.

Recipient(s) for Send project

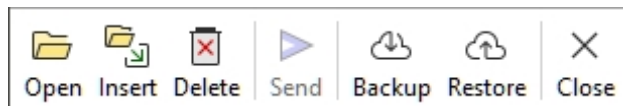
This is where you can choose the recipient(s) to send the selected project(s) to.

A dialog box titled "Recipient(s) for Send project". It contains a label "User name(s):" followed by a text input field containing "myUserName" and a dropdown arrow. Below the input field is an empty text box and a close button (X).

For instructions, consult [Send](#).

Tools and commands (Project management)

The toolbar on the bottom contains various buttons described below.



Open

Opens the selected project for viewing and editing. The newly opened project replaces the previously opened planogram project.

Note: only one project must be selected in the list to be able to open it.

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

Insert (project)

Inserts the project selected in the list into the currently opened project.

This is a simple and powerful feature which lets you combine several planogram projects, for example to create a complete store aisle from smaller sections, or even a complete store.

You can insert as many projects as you wish into your current planogram project.

Instructions:

1. Find the desired project in the list.
2. Click on Insert. The list of projects is closed and a cursor with a plus sign appears.
3. Drag the cursor to the desired insertion location in the visualization area.
4. The content of the selected project is added to your current planogram.
5. Re-position the inserted elements where you want if necessary.
6. Repeat the above steps to insert more projects into your planogram.
7. Save your project (or **save as...** if you don't want to overwrite your initial project).

The way projects are placed depends on the state of [Free bay placement](#):

- With **Free bay placement** not checkmarked:
 - If there is no existing bay in your project: the inserted project is centered on the ground.
 - If there are existing bays in your project:

- The inserted bays are placed adjacent to the existing bays, based on the cursor position: left, right or in-between, pushing other bays to make space in this last case.
- The inserted room elements are placed to maintain their original relative position to the inserted bays.
- With **Free bay placement** checkmarked: inserted project is placed at the cursor position on the ground. If there are other objects at this position, they may overlap.

Notes:

- Only one project must be selected in the list to use this command. You can however repeat the command to insert several projects sequentially.
- When [Free bay placement](#) is not checkmarked for your current project and you add a Free bay placement project, Free bay placement will automatically be activated for the current project to maintain the positioning the merged shelving.
- The project inserted into the current project is placed as an independent copy of the original project retaining no link with it. This means that if you make changes to your current planogram after having inserted another project, your changes only affect your current project, not the original inserted project.

Tip: For projects which you want to often insert into other planograms, turn them into [Template](#) so they will be displayed in the [Template catalog](#) for convenient drag and drop insertion.

Delete (project)

Deletes the project(s) selected in the list.

- Keyboard shortcut: **Del**

A confirmation message box will pop up to confirm deletion.

Note: only the projects which the user has the right to delete are deleted. The currently opened project and projects marked as [Locked \(Project properties\)](#) cannot be deleted either.

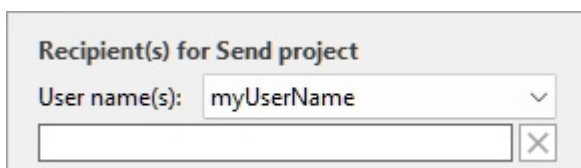
Warning: deleted projects cannot be recovered unless you had previously made a [Backup](#).

Send

Sends an independent copy of the selected project(s) to one or several other PlanogramBuilder user(s) in your company.

Instructions:

1. Select the project(s) to send in the list.
2. On the right of the screen, below **Recipient(s) for Send project**, in the drop-down list next to **User name(s)**, select the destination user(s). To select several recipients, just pick them one by one in the list. They will be added to the text field just below.



Tip: If you or your colleagues don't know your username, you can find it at the upper right of the work screen as shown in the [Screen Layout](#).

3. Click on **Send**.

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

Notes:

- Projects sent to other user(s) are independent copies of the original project, retaining no connection to it. If you wish other users to see the evolution of your project, send the project again after changes, or use other methods to share projects as explained in [Template](#) and [Shared projects](#).
- *Note:* only the projects which the user has the right to delete are deleted. The currently opened project cannot be sent either. Close it with [New \(Projects\)](#) before sending it.

Backup

Note: Only available to [PlanogramBuilder Administrator](#)

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

To back up your planogram projects, follow these steps:

1. Click on **Backup**. This opens a *file save* dialog.
2. Choose a local folder, optionally change the suggested file name and the Excel file format.
3. Click **Save** to create the backup Excel file.

Restore

Note: Only available to [PlanogramBuilder Administrator](#)

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

To restore your planogram projects, follow these steps:

1. Click on **Restore**. This opens a *file open* dialog.
2. Choose the folder, then the Excel file to restore.
3. Click **Open** to restore the projects.

What happens exactly when you restore projects:

- Projects listed in the input file and that don't exist in your project list are added to your project list. This is typically the case with projects that were deleted after your last backup.
- Projects listed in the input file and that already exist in your project list overwrite the respective projects in your project list. Any changes made after the date of the input backup file will be lost.
- Projects that already exist in your project list but not listed in the input file are left in your project list. No project is deleted.

Editing the Excel input file (*advanced users only*):

Restore must always use as a base an input file created with [Backup](#). A backup contains all the previously saved projects, but you can edit the Excel file to update some project information and to remove any project that you don't want to restore. To do such, open the input file in your spreadsheet application and optionally do the following:

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

- Edit values in any of the following column: *Name, Comment, Date Created, Date modified, Template, Locked (Project properties), Owner, Sender, Project Classification Properties*. If you change values in these columns, make sure to use the exact same format as the existing other lines and enter values that make sense. For example, don't enter a non-existing *username* under *Owner*.
- **Important:** Never edit the following columns: *Project #, Data, Checksum*.
- Use **Save As...** (not **Save**) and enter a different name for the edited file to restore, to save your modified file in Excel: this way you will still have the original backup file.

Important tip: Before restoring projects, make sure to create a backup so you can revert in case something goes wrong.

Tip: Before you restore projects, make sure to display the projects of all users in your project list. To do so, enable [Shared projects](#) (if you are an administrator).

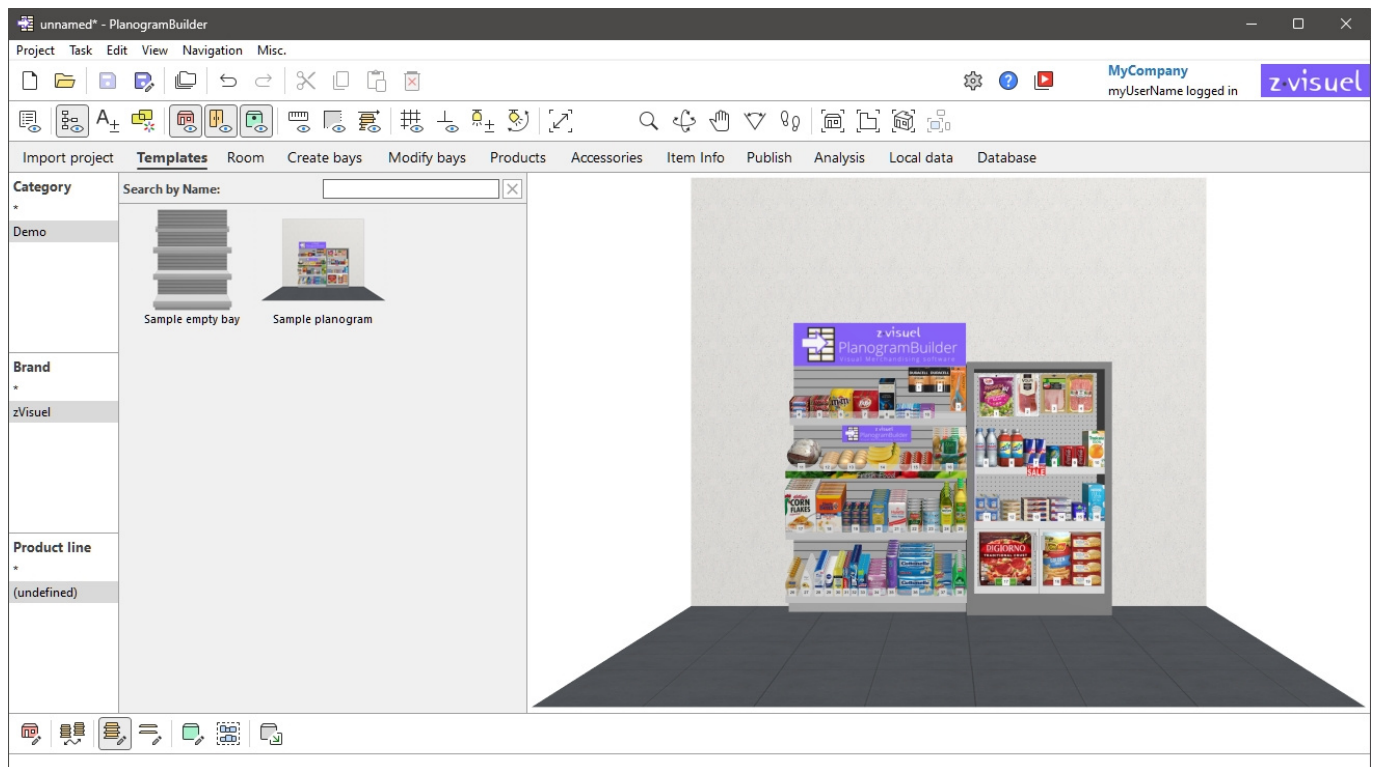
Close

Closes the Project management pane.

- Keyboard shortcut: **Esc** (only works before using your mouse on any user interface element of the pane)

Templates

This task displays all the projects which have been flagged as [Template](#).



Templates can be seen by all users in your company to drag & drop into any planogram.

Typically, you can use them for often-used projects or elements, in particular for empty structures of [Room](#), Bay ([Create bays](#), [Modify bays](#)), and for projects used as guidelines for other planograms.

Note that any project can be turned into **Template** (consult [Template](#) for instructions).

Template catalog

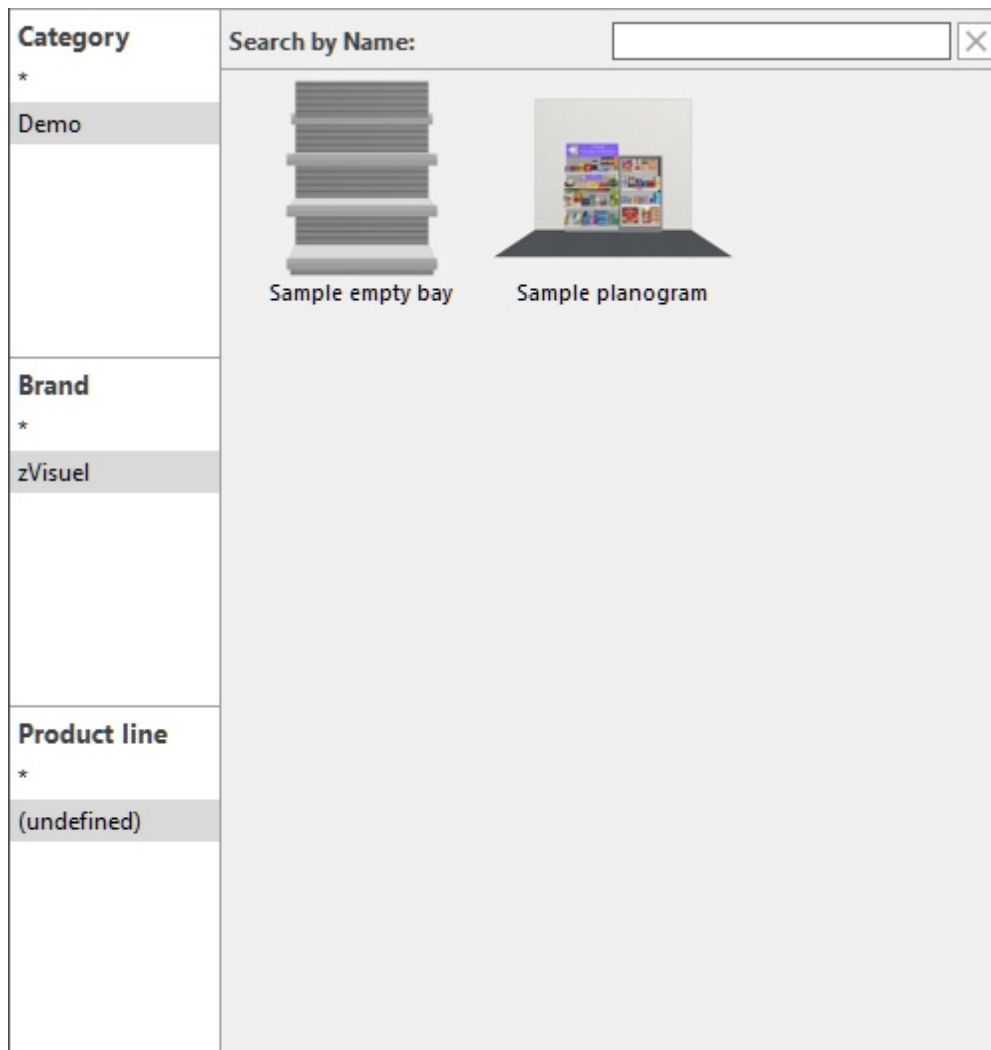
The catalog shows the list of available template projects which you can drag into your current planogram project.

They are sorted by [Project Classification Properties](#) and a search filter is available to help you find the desired template. Consult [Classification hierarchy \(Catalog of products\)](#) and to [Search by text \(Catalog of products\)](#) for help on using these features since the principle is the same for the products catalog.

Catalog template list

The right side of the catalog pane displays the list of templates corresponding to your current [Classification hierarchy \(Catalog of products\)](#) or to your [Search by text \(Catalog of products\)](#).

Each template is represented by its thumbnail and its name.



Inserting templates into a planogram

You can insert as many templates as you wish into your current planogram project:

1. Find the desired template in the catalog using the classification or the text filters.
2. Drag it to the desired insertion location in the visualization area.



3. The content of the template is added to your current planogram.
4. Re-position the inserted elements where you want if necessary.
5. Repeat the above steps to insert more templates into your planogram.
6. Save your project (or **save as...** if you don't want to overwrite your initial project).

The way template are placed depends on the state of [Free bay placement](#):

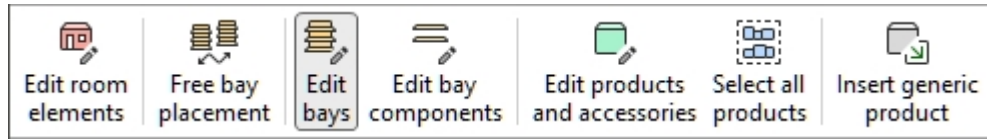
- With **Free bay placement** not checkmarked:
 - If there is no existing bay in your project: the inserted template is centered on the ground.
 - If there are existing bays in your project:
 - The inserted bays are placed on the ground, adjacent to the existing bays, based on the cursor position: left, right or in-between, pushing other bays to make space in this last case.
 - The inserted room elements are placed so as to maintain their original relative position to the inserted bays.
- With **Free bay placement** checkmarked: the inserted template is placed at the cursor position on the ground. If there are other objects at this position, they may overlap.

Notes:

- When [Free bay placement](#) is not checkmarked for your current project and you insert a Free bay placement project, Free bay placement will automatically be activated for the current project to maintain the positioning the merged shelving.
- The templates dragged into the current project are placed as independent copies of the original template project; they retain no link with it. This means that if you make changes to elements in your current planogram after they have been dragged from the template catalog, these changes only affect your current project, not the original template project.

Tools and commands (Templates)

The toolbar of this task includes the basic tools and commands to move and rotate bays. This allows you to quickly position the bays after having dragged them from the catalog.

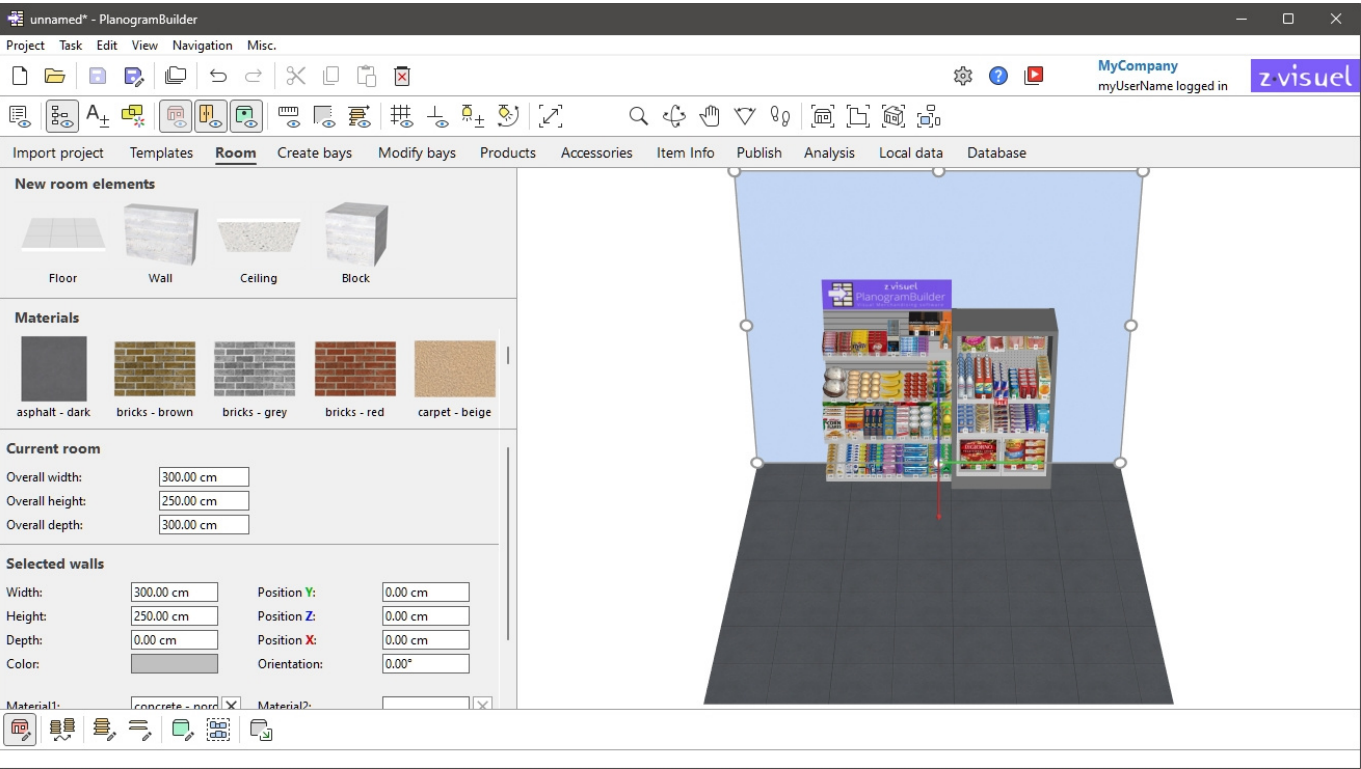


Consult [Tools and commands \(Modify bays\)](#) for descriptions of the above tools and commands.

Room

In this task, you can create and edit your retail space structural elements such as floors, walls, ceilings.

If you don't want to include the retail space in your planograms, you can skip this section altogether and work only with shelving and products.



Note: In this task, unchecking [View the room](#) has no effect: Room is always shown so you can edit it.

New room elements

Parametric structural elements are available to build the retail space in your planogram.



Types of New room elements

The following room elements can be added:

Floor (New room elements)

An element with 1 material on the top surface. By default, floors are 600 × 600 cm (or equivalent), have no bottom surface and no thickness.

Tip: You can combine several floor elements to create non-rectangular sales floors.

Wall (New room elements)

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

Ceiling (New room elements)

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

Block (New room elements)

An element with 1 same material applied to all sides. By default, boxes are 100 × 100 × 100 cm.

Adding New room elements

Instructions:

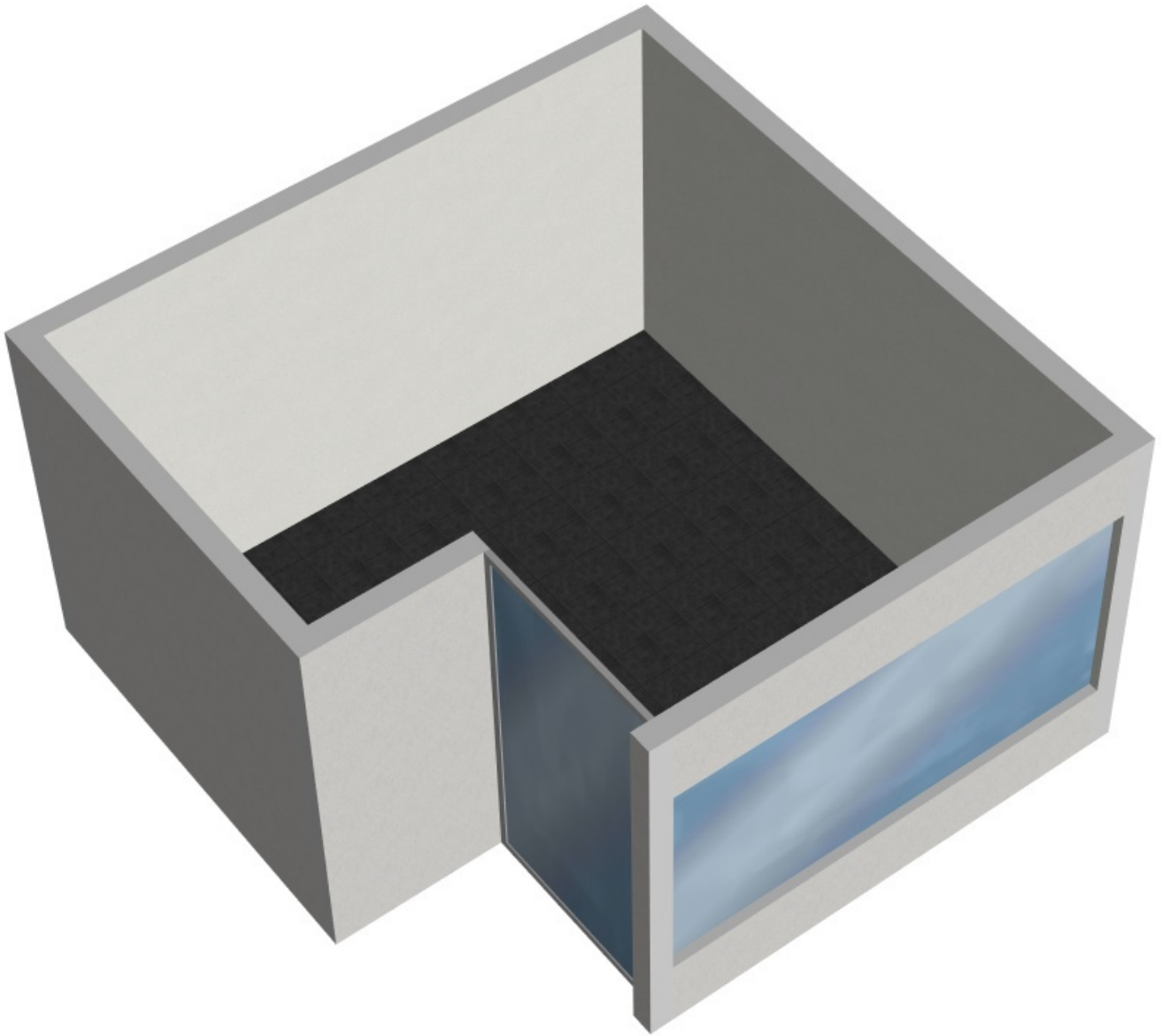
1. Drag the desired new element thumbnail to the visualization area. Typically, start with a floor.
2. Drag additional elements such as walls and ceiling.

To create more complex rooms, you can combine several floors, walls and ceilings and use [Block](#) to create other structural elements such as columns or obstacles.

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

Note: you can resize each room element, including adding thickness. Consult [Resize \(Edit room elements\)](#). The whole retail space can also be resized (consult [Current room](#)).

Tip: If you want to re-use a room in other planograms, save the room as a project and make flag it as [Template](#). You can then drag the room into any other planogram.



Example of Room

Current room

Here you can see and edit the overall parameters of your retail space.

Current room	
Overall width:	<input type="text" value="300.00 cm"/>
Overall height:	<input type="text" value="250.00 cm"/>
Overall depth:	<input type="text" value="350.00 cm"/>

Once you have placed at least one room element, its parameters are displayed.

Parameters (Room)

To change the overall retail space size, edit the dimension values. The room is then rescaled to match your new values. Wall, floor and ceiling original thicknesses are maintained.

Width (Room)

The physical width of the room in the current measurement unit.

- Supported values: positive numeric value [0-9 and decimal point]
- Default value: 600 cm (or equivalent according to [Measurement unit](#))
- Example: 560

Tip: You don't need to type the actual measurement unit (e.g., cm), only the value.

Height (Room)

The physical height of the room in the current measurement unit.

- Supported values: positive numeric value [0-9 and decimal point]
- Default value: 300 cm (or equivalent according to [Measurement unit](#))
- Example: 240

Tip: You don't need to type the actual measurement unit (e.g., cm), only the value.

Depth (Room)

The physical depth of the room in the current measurement unit.

- Supported values: positive numeric value [0-9 and decimal point]
- Default value: 600 cm (or equivalent according to [Measurement unit](#))
- Example: 450

Tip: You don't need to type the actual measurement unit (e.g., cm), only the value.

Selected room elements

If you have selected one or more room elements, this area lets you edit their properties. The listed properties depend on the type of element as illustrated below.

Selected floors

Width:

300.00 cm

Height:

0.00 cm

Depth:

300.00 cm

Color:

Material1:

tiles - textured

X

☒ Tile:

Width:

80.00 cm

Height:

80.00 cm

Position Y:

0.00 cm

Position Z:

0.00 cm

Position X:

150.00 cm

Selected floors

Selected walls			
Width:	<input type="text" value="300.00 cm"/>	Position Y :	<input type="text" value="0.00 cm"/>
Height:	<input type="text" value="250.00 cm"/>	Position Z :	<input type="text" value="0.00 cm"/>
Depth:	<input type="text" value="0.00 cm"/>	Position X :	<input type="text" value="0.00 cm"/>
Color:	<input type="color" value="#808080"/>	Orientation:	<input type="text" value="0.00°"/>
Material1:	<input type="text" value="concrete - porc"/> <input type="button" value="X"/>	Material2:	<input type="text" value=""/> <input type="button" value="X"/>
<input checked="" type="checkbox"/> Tile:	Width: <input type="text" value="40.00 cm"/> Height: <input type="text" value="40.00 cm"/>	<input type="checkbox"/> Tile:	Width: <input type="text" value="100.00 cm"/> Height: <input type="text" value="100.00 cm"/>

Selected walls

Selected ceilings			
Width:	<input type="text" value="300.00 cm"/>	Position Y :	<input type="text" value="0.00 cm"/>
Height:	<input type="text" value="0.00 cm"/>	Position Z :	<input type="text" value="250.00 cm"/>
Depth:	<input type="text" value="300.00 cm"/>	Position X :	<input type="text" value="150.00 cm"/>
Color:	<input type="color" value="#808080"/>		
Material1:	<input type="text" value=""/> <input type="button" value="X"/>		
<input type="checkbox"/> Tile:	Width: <input type="text" value="100.00 cm"/> Height: <input type="text" value="100.00 cm"/>		

Selected ceilings

Selected blocks			
Width:	<input type="text" value="100.00 cm"/>	Position Y :	<input type="text" value="0.00 cm"/>
Height:	<input type="text" value="100.00 cm"/>	Position Z :	<input type="text" value="0.00 cm"/>
Depth:	<input type="text" value="100.00 cm"/>	Position X :	<input type="text" value="300.00 cm"/>
Color:	<input type="color" value="#808080"/>	Orientation:	<input type="text" value="0.00°"/>
Material1:	<input type="text" value=""/> <input type="button" value="X"/>		
<input type="checkbox"/> Tile:	Width: <input type="text" value="100.00 cm"/> Height: <input type="text" value="100.00 cm"/>		

Selected blocks

Selected room elements

Width:

Height:

Depth:

Color:

Material1:

X

Tile:

Width:

Height:

Position Y:

0.00 cm

Position Z:

0.00 cm

Position X:

Selected room elements

Parameters (Selected room elements)

Width (Selected room elements)

The physical width of the room element in the current measurement unit.

- Supported values: positive numeric value [0-9 and decimal point]
- Default values:
 - Floor, Wall, Ceiling:** 600 cm (or equivalent according to [Measurement unit](#))
 - Block:** 100 cm (or equivalent)
- Example: 240

Tip: You don't need to type the actual measurement unit (e.g., cm), only the value.

Tip: The width can also be defined with the mouse. Consult [Resize](#) .

Height (Selected room elements)

The physical height of the room element in the current measurement unit.

- Supported values: positive numeric value [0-9 and decimal point]
- Default values:
 - Floor, Ceiling:** 0 cm
 - Wall:** 300 cm (or equivalent according to [Measurement unit](#))
 - Block:** 100 cm (or equivalent)
- Example: 10.2

Note: You can add thickness to floors and ceiling by changing their height.

Tip: You don't need to type the actual measurement unit (e.g., cm), only the value.

Tip: The height can also be defined with the mouse. Consult [Resize](#) .

Depth (Selected room elements)

The physical depth of the room element in the current measurement unit.

- Supported values: positive numeric value [0-9 and decimal point]
- Default values:
 - **Floor, Ceiling:** 600 cm (or equivalent according to [Measurement unit](#))
 - **Wall:** 0 cm
 - **Block:** 100 cm (or equivalent)
- Example: 7.14

Note: You can add thickness to walls if desired by changing their depth.

Tip: You don't need to type the actual measurement unit (e.g., cm), only the value.

Tip: The depth can also be defined with the mouse. Consult [Resize](#) .

Position **Y** (Selected room elements)

The position of the selected elements base point(s) on the Y axis in the current measurement unit.

- Supported values: positive/negative numeric value [+0-9 and decimal point]
- Default values: none (the initial position depends on where the element was dragged)
- Example: 0

Note: The tripod with colored axes is also shown in the visualization area, indicating the space origin point (0, 0, 0) and the direction of each axis.

Tip: The position can also be defined with the mouse. Consult [Move \(Edit room elements\)](#).

Position **Z** (Selected room elements)

The position of the selected elements base point(s) on the Y axis in the current measurement unit.

- Supported values: positive/negative numeric value [+0-9 and decimal point]
- Default values: none (the initial position depends on where the element was dragged)
- Example: 420

Note: The tripod with colored axes is also shown in the visualization area, indicating the space origin point (0, 0, 0) and the direction of each axis.

Tip: The position can also be defined with the mouse. Consult [Move \(Edit room elements\)](#).

Position **X** (Selected room elements)

The position of the selected elements base point(s) on the Y axis in the current measurement unit.

- Supported values: positive/negative numeric value [+0-9 and decimal point]
- Default values: none (the initial position depends on where the element was dragged)
- Example: -200

Note: The tripod with colored axes is also shown in the visualization area, indicating the space origin point (0, 0, 0) and the direction of each axis.

Tip: The position can also be defined with the mouse. Consult [Move \(Edit room elements\)](#).

Orientation (Selected room elements)

Only applicable to the following elements: [Wall](#), [Block](#)

The angle of rotation of the selected elements in degrees around their respective vertical axis (**Z**).

- Supported values: positive/negative numeric value [+/-0-9 and decimal point]
- Default values:
 - Wall: none (the initial orientation depends on where the wall was dragged)
 - Block: 0
- Example: -45

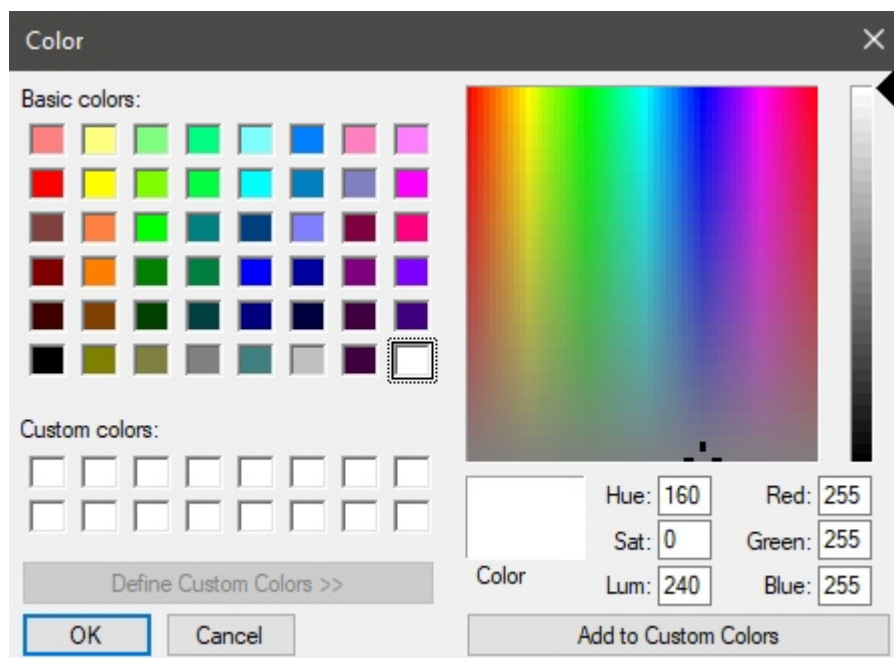
Color (Selected room elements)

This property lets you specify a uniform color for the selected room elements.

- Supported values: any color picked from the color palette
- Default value: light gray
- Example: blue

Instructions:

1. Click on the color swatch next to Color to display the color palette.
2. Pick any color from the **color palette**.



3. Click **OK** to confirm.

Note: The color is overridden by any material that has been applied (consult [Materials](#)).

Material1, Material2 (Selected room elements)

Material2 only applicable to the following element: [Wall](#)

The first and second materials assigned to the selected elements.

- Supported values: the name of a material available in [Materials](#)
- Default value: empty
- Example: *bricks - red*

To remove an assigned material, click on the small red cross button next to the material name.

To assign materials, consult [Materials](#).

Tile

Consult [Tile](#).

Note: For materials provided with PlanogramBuilder, the initial setting is not defined in the database, but can still be changed for the material assigned to the selected elements.

Width

Consult [Width \(Item properties\) \(for materials\)](#).

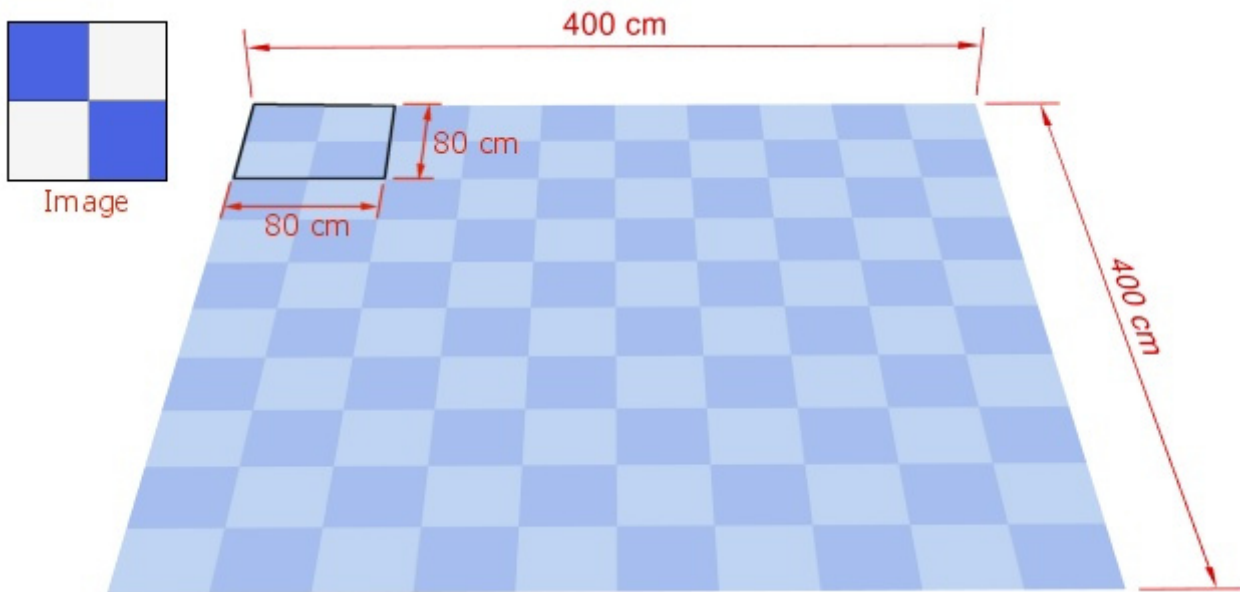
Note: For materials provided with PlanogramBuilder, the initial value is not defined in the database, but can still be changed for the material assigned to the selected elements.

Height

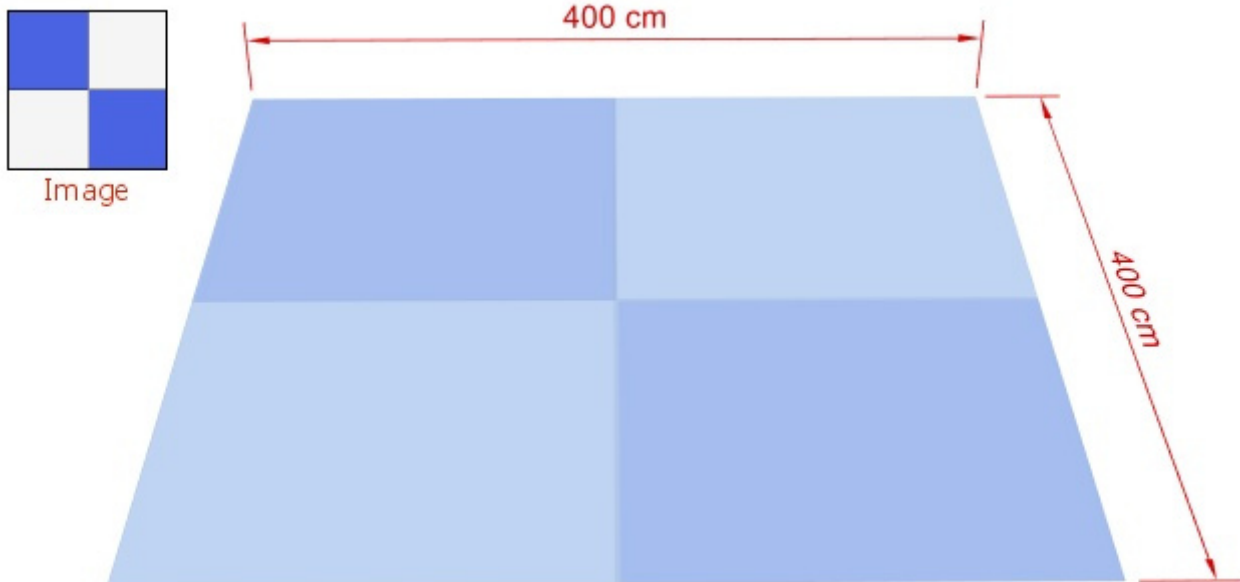
Consult [Height \(Item properties\) \(for materials\)](#).

Note: For materials provided with PlanogramBuilder, the initial value is not defined in the database, but can still be changed for the material assigned to the selected elements.

Examples of materials with and without tiling



Example of a material with Tile, Width 80 cm, Height 80 cm. The image is repeated.



Example of a material without Tile. The image is stretched to fill the element.

Materials

You can apply materials to make room elements look more realistic.

Material catalog

The materials are listed in the catalog as shown below.



PlanogramBuilder comes with a set of predefined commonly used materials. These are always listed in the catalog but cannot be removed or listed in the database.

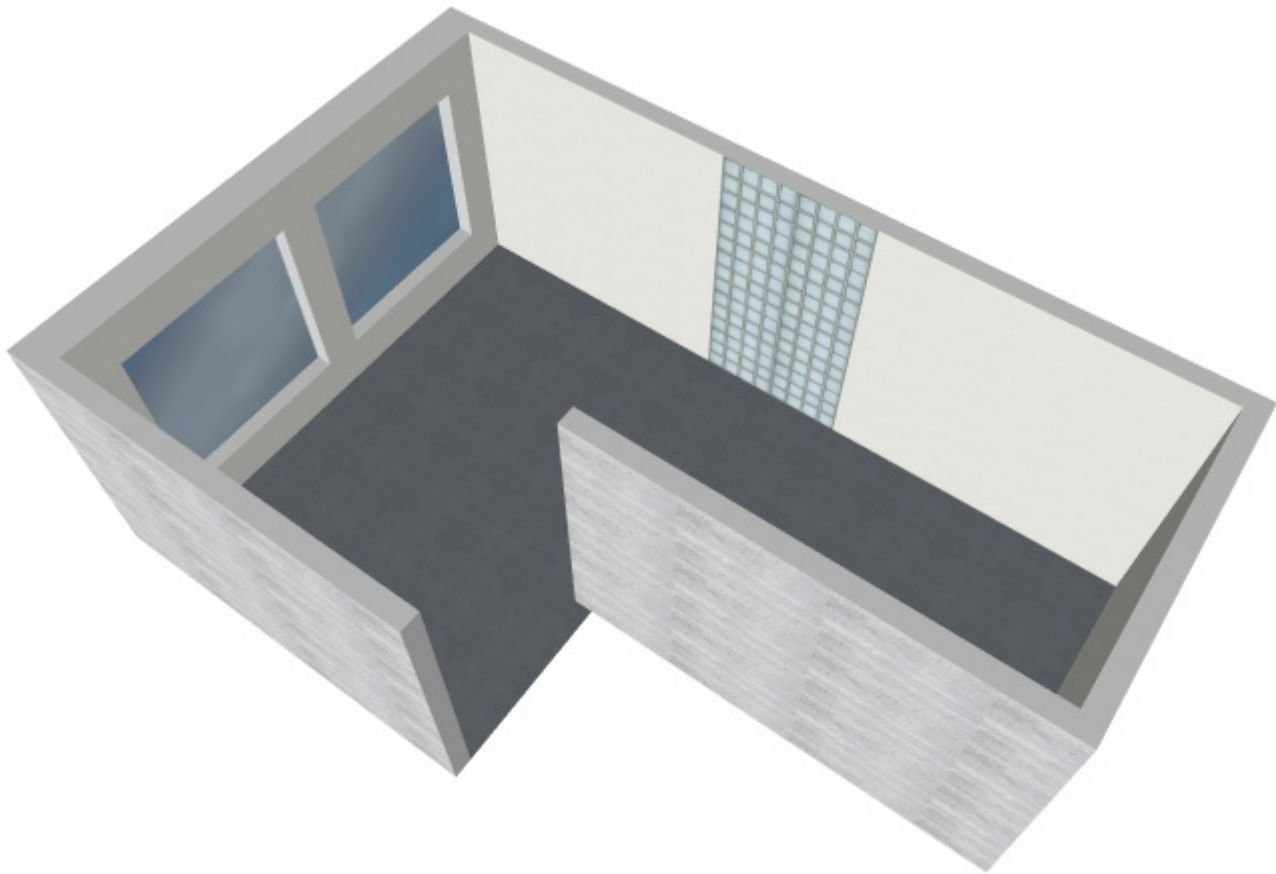
Creating your own materials

You can also create your own materials in the database, and they will be available in the materials catalog. For example, you can import a floor plan image of your sales surface, then apply it to a floor element and use it as a basis to construct your room in 3D. Consult [Database](#).

Applying materials to an element

1. Find the desired material in the catalog.
2. Drag the material thumbnail to the desired room element in your planogram.
3. The material is now applied to the element or to one of its surfaces.

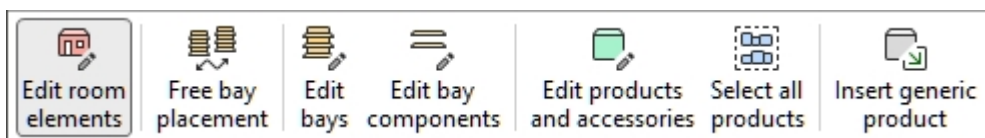
Note: floors, ceilings and boxes have 1 material, while walls can have 2 materials, one for each side of the wall. To apply a material to the desired side of a wall, make sure to orbit the view so that the desired side is visible before dragging the material onto it.



Example of a room with a combination of room elements and materials.

Tools and commands (Room)

The object editing toolbar includes a tool to work on the Room:



Some additional commands that can be used with Room and elements can be found in another toolbar described in [General edit commands](#):

- [Undo \(Edit\)](#)
- [Redo \(Edit\)](#)
- [Delete \(Edit\)](#)

The tools and commands to work with room elements are also available in [Main Menu](#) > **Edit**:

Undo	Ctrl+Z
Redo	Ctrl+Y
Cut	Ctrl+X
Copy	Ctrl+C
Paste	Ctrl+V
Delete	Delete
Edit room elements	R
Free bay placement	
Edit bays	B
Edit bay components	S
Edit products and accessories	I
Select all products	Ctrl+A
Align and space	>
Rotate products	>
Insert generic product	N
Fit width to bay	

The tools and commands which are specific to Room are described below.

Edit room elements

This tool lets you select room elements and perform various operations such as editing the room and its elements properties or moving and copying elements.

- Keyboard shortcut: **R**

Note: This tool is automatically activated when you switch to [Room](#). In contrast, the keyboard shortcut activates the tool so you can select room elements even without switching to **Room**.

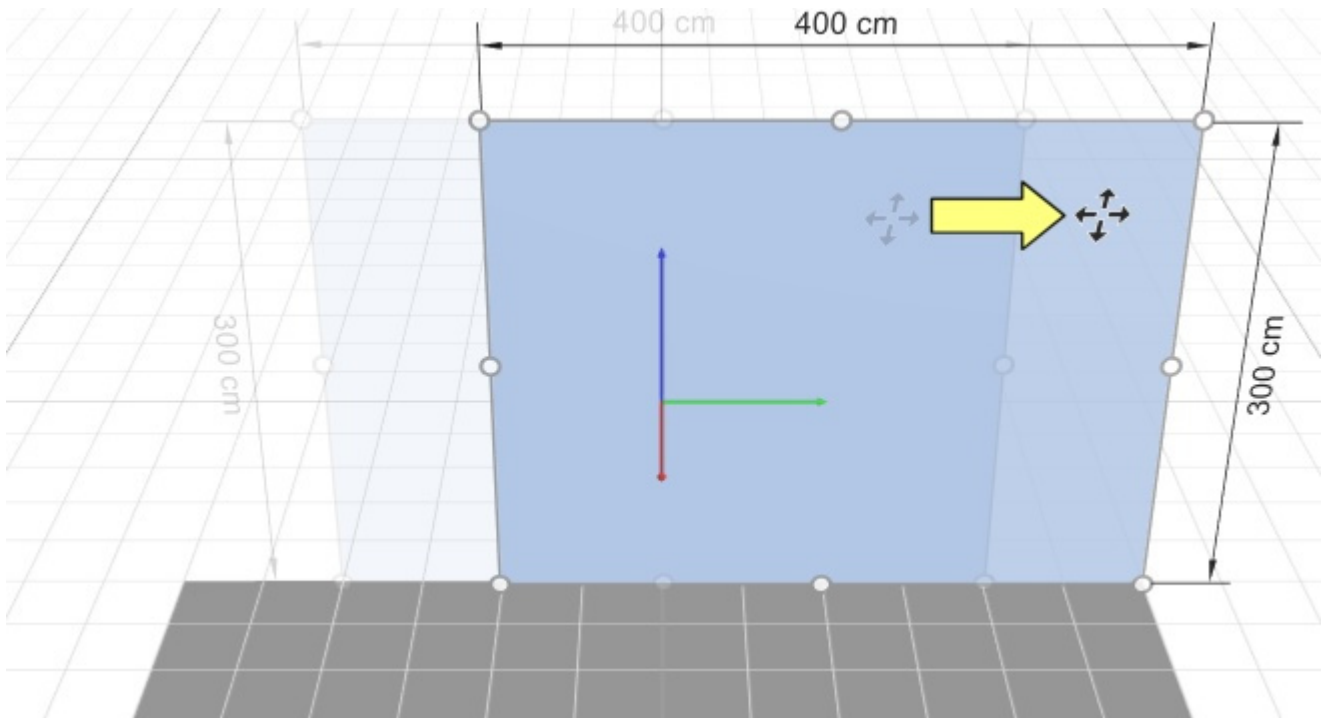
Select (Edit room elements)

1. Click on **Edit room elements**.
2. **Select** the desired room elements:
 - a. To select one element, **click** on the desired element in the visualization area.
 - b. To select multiple elements: Hold the **Ctrl** key while **clicking** on desired elements. Or **draw a rectangle** with your mouse pointer across the desired elements.
3. Selected elements become(s) highlighted in blue so you can perform several tasks with it (them).

To deselect one or more elements, click in an empty area in the visualization area, or **Ctrl** + **click** on the selected elements.

Move (Edit room elements)

1. **Select** elements.
2. **Drag** the selected elements with the left mouse button pressed.
3. **Release** the mouse button.



Notes:

- With [View grid](#), elements are moved to 1 cm (or 0.5") rounded position values.
- Without [View grid](#), elements are snapped to the grid lines.
- To move elements completely freely, you can hold the space bar while moving, producing a slower motion and preventing position rounding.

Tip: The position can also be defined precisely. Consult [Position Y \(Selected room elements\)](#), [Position Z \(Selected room elements\)](#), [Position X \(Selected room elements\)](#).

Copy by moving (Edit room elements)

1. **Select** elements.
2. Press and hold **Ctrl** key down.
3. **Drag** the selected elements with the left mouse button pressed.

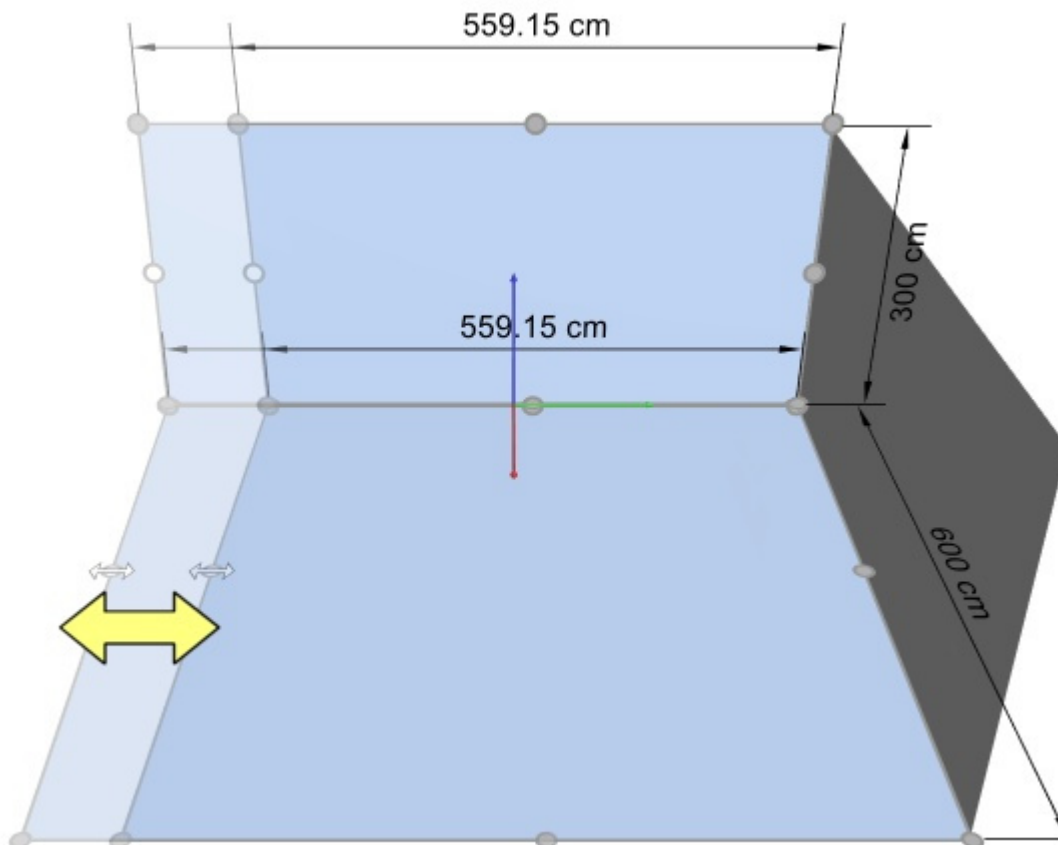
Notes:

- With [View grid](#), elements are copied to 1 cm (or 0.5") rounded position values.
- Without [View grid](#), elements are snapped to the grid lines.
- To copy elements completely freely, you can hold the space bar while copying, producing a slower motion and preventing position rounding.

Resize (Edit room elements)

Elements can be resized by dragging handles on the object(s) with your mouse:

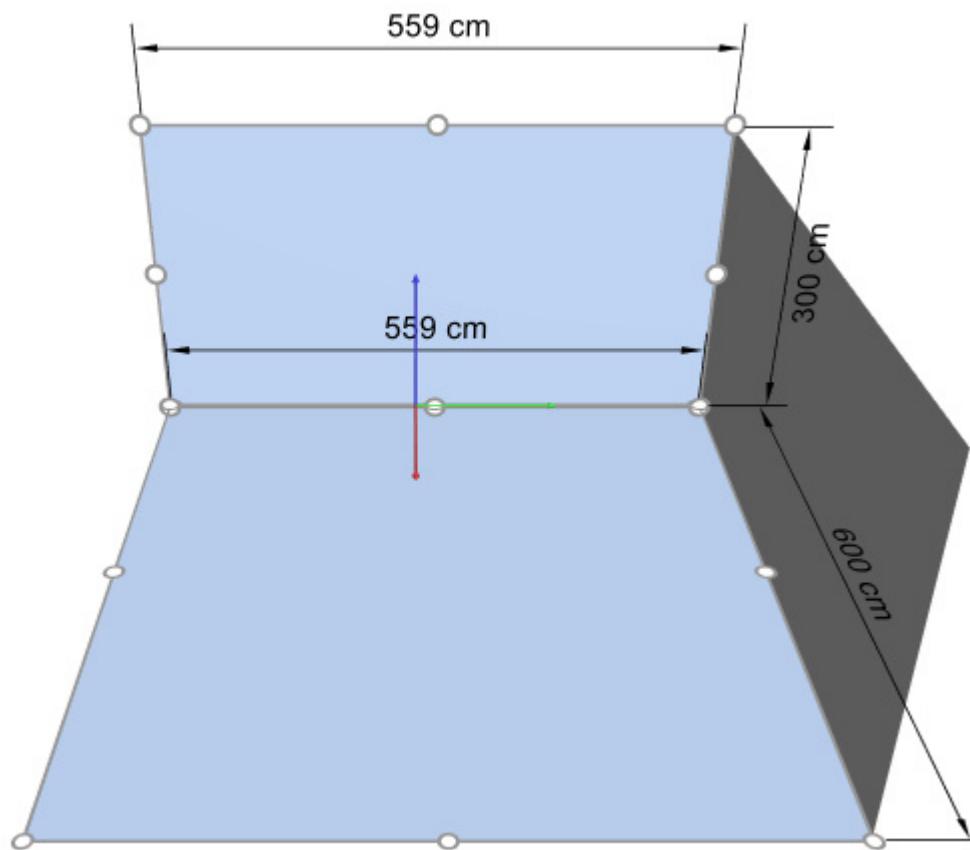
1. **Select** the desired room elements. They (It) become(s) highlighted with round handles around the surfaces most closely facing the screen.
2. If the round handles do not appear on the selected elements, use [Zoom](#) to enlarge them on screen.
3. If the round handles do not appear on the desired surface, use navigation tools such as [Orbit](#) to make the desired surfaces face the screen.
4. Grab a handle with the mouse and drag it until your elements reach the desired size(s). The corner handles let you resize in two directions, while the handles along edges let you constrain resizing to one direction.
5. Release the mouse button when you are satisfied with the element dimensions.



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

Tip: The dimensions of the resizing rectangle are displayed while resizing if [View dimensions](#) is ON, as shown in the above picture. This is useful if you know in advance the space to allocate to the room elements.

Tip: The actual dimensions of the selected room elements are displayed when [View dimensions](#) is ON, and while you are not dragging a handle:



Tip: Handles are convenient for quick mouse editing, but you can also specify precise values. Consult [Width \(Selected room elements\)](#), [Height \(Selected room elements\)](#), [Depth \(Selected room elements\)](#).

Create bays

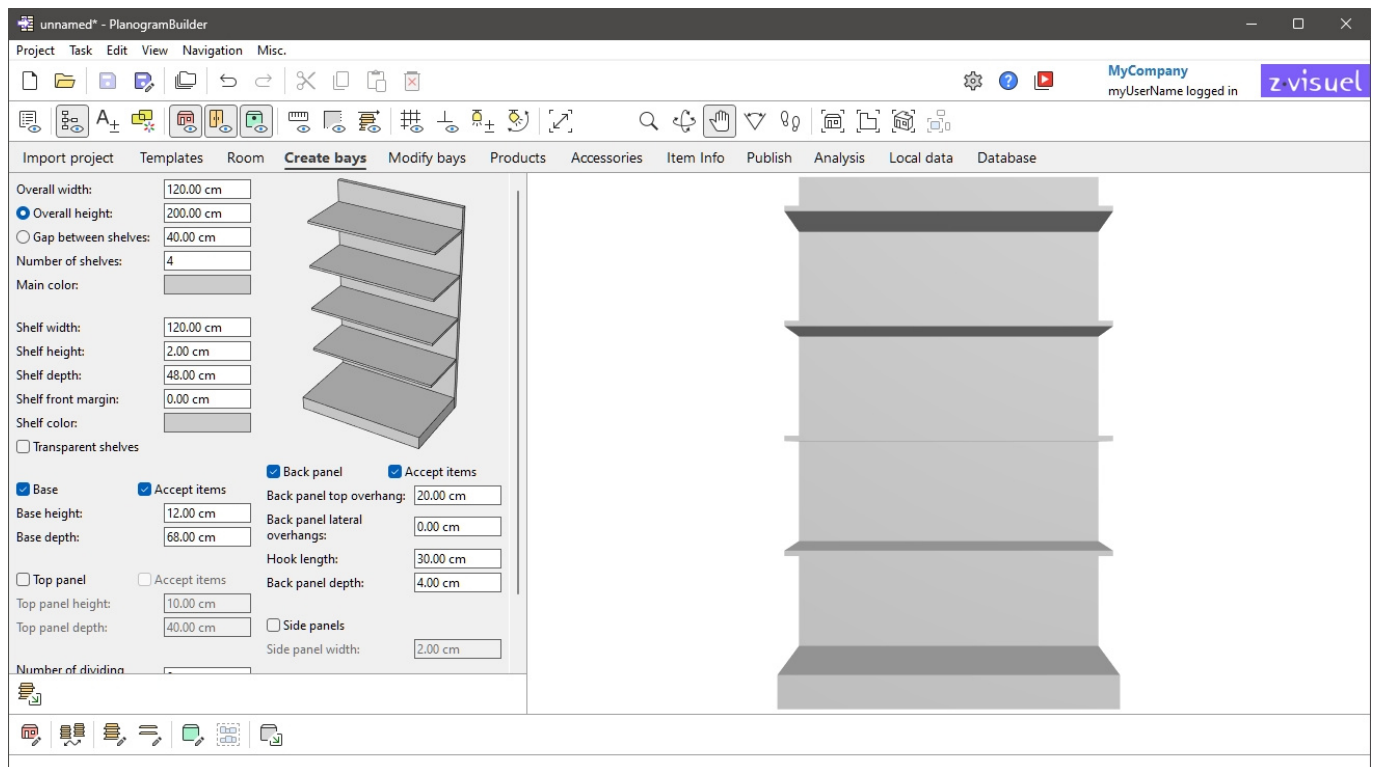
Video tutorial on this topic: [10: Creating and managing gondolas](#)

This task is where you define and add new shelving furniture for your planogram projects.

In PlanogramBuilder user interface, each piece of furniture to place products is called **Bay**. You can create various kinds of furniture such as gondolas, freezers, racks, pegboard displays, tables, etc.

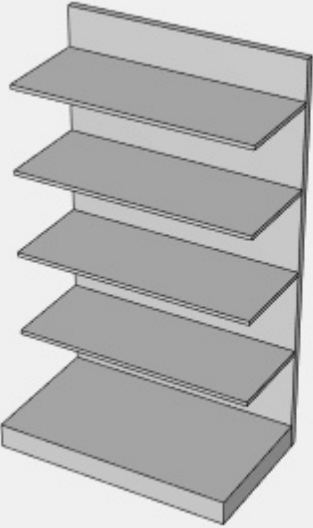
Shelving is created with parametric 3D objects that you can build as per the specifications of real shelving found in your stores.

The basic characteristics of new bays are specified here and will apply to all new bays until you change settings again. After creation, you can modify shelving with [Modify bays](#).



Parameters (Create bays)

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

Overall width:	<input type="text" value="120.00 cm"/>	
<input checked="" type="radio"/> Overall height:	<input type="text" value="200.00 cm"/>	
<input type="radio"/> Gap between shelves:	<input type="text" value="40.00 cm"/>	
Number of shelves:	<input type="text" value="4"/>	
Main color:	<input type="text" value=""/>	
Shelf width:	<input type="text" value="120.00 cm"/>	
Shelf height:	<input type="text" value="2.00 cm"/>	
Shelf depth:	<input type="text" value="48.00 cm"/>	
Shelf front margin:	<input type="text" value="0.00 cm"/>	
Shelf color:	<input type="text" value=""/>	
<input type="checkbox"/> Transparent shelves		
<input checked="" type="checkbox"/> Base	<input checked="" type="checkbox"/> Accept items	<input checked="" type="checkbox"/> Back panel
Base height:	<input type="text" value="12.00 cm"/>	<input checked="" type="checkbox"/> Accept items
Base depth:	<input type="text" value="68.00 cm"/>	Back panel top overhang:
<input type="checkbox"/> Top panel	<input type="checkbox"/> Accept items	Back panel lateral overhangs:
Top panel height:	<input type="text" value="10.00 cm"/>	Hook length:
Top panel depth:	<input type="text" value="40.00 cm"/>	Back panel depth:
Number of dividing panels:	<input type="text" value="0"/>	<input type="checkbox"/> Side panels
Dividing panel width:	<input type="text" value="2.00 cm"/>	Side panel width:
Dividing panel depth:	<input type="text" value="48.00 cm"/>	

Note: the preview is displayed with visible edge lines to make each component clearly distinguishable. You can also turn this mode on in the planogram visualization area if you wish ([View edges](#)).

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

Parameters of the whole bay (Create bays)

These are parameters for the entire bay to create.

Overall width (Create bays)

The physical width of the bay in the current measurement unit.

- Supported values: positive numeric value [0-9 and decimal point]
- Default value: 120 cm (or equivalent according to [Measurement unit](#))
- Example: 240

Tip: You don't need to type the actual measurement unit (e.g., cm), only the value.

Overall height (Create bays)

Radio button

Upon typing a value for this parameter or manually checking the corresponding radio button, Overall height will be constrained to the set value. This way, editing other values such as [Number of shelves](#) won't change Overall height, but will automatically adjust [Gap between shelves](#) instead.

Tip: Choose Overall height and [Number of shelves](#) if you know the bay height.

Value

The physical height of the bay in the current measurement unit.

- Supported values: positive numeric value [0-9 and decimal point]
- Default value: 200 cm (or equivalent according to [Measurement unit](#))
- Example: 180

Tip: You don't need to type the actual measurement unit (e.g., cm), only the value.

Gap between shelves

Radio button

Upon typing a value for this parameter or manually checking the corresponding radio button, Gap between shelves is constrained to the set value. This way, editing other values such as [Number of shelves](#) won't change Gap between shelves, but automatically adjusts [Overall height](#) instead.

Tip: Choose Gap between shelves and [Number of shelves](#) if the space between each shelf is more important than the overall height of the bay.

Value

The vertical empty space between shelves in the current measurement unit. All shelves are evenly spaced.

- Supported values: positive numeric value [0-9 and decimal point]
- Default value: 40 cm (or equivalent according to [Measurement unit](#))
- Example: 37.5

Tip: You don't need to type the actual measurement unit (e.g., cm), only the value.

Number of shelves

The number of shelves on the bay.

- Supported values: positive numeric value [0-9]
- Default value: 4
- Example: 0

Note: Changing the number of shelves influences [Overall height](#) if you checkmarked the radio button next to [Gap between shelves](#). Inversely, changing the number of shelves modifies [Gap between shelves](#) if you checkmarked the radio button next to [Overall height](#).

Note: Number of shelves counts standard shelves only, not including [Base](#) and [Top panel](#).

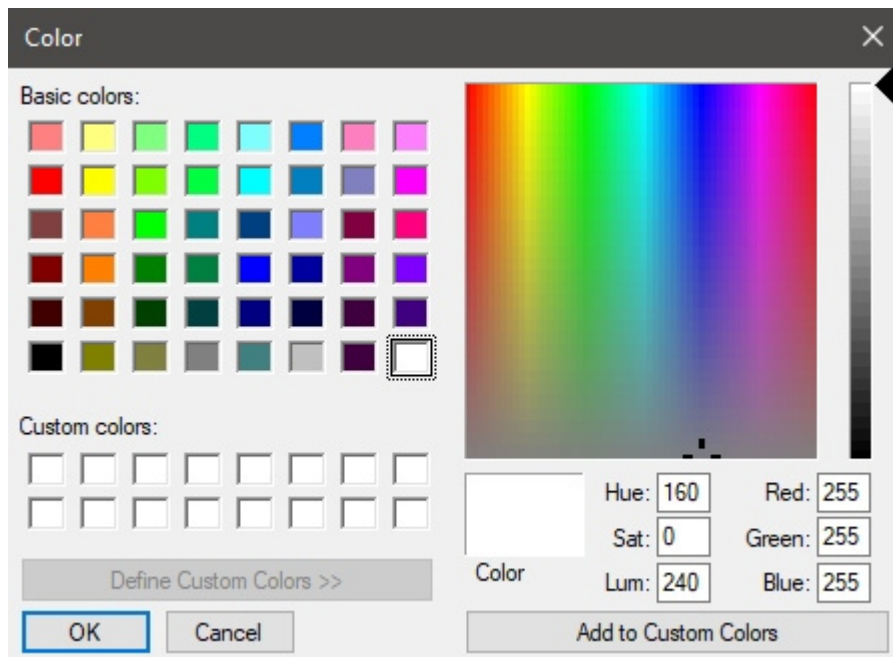
Main color

The color of the structure ([Base](#), [Back panel](#), [Side panels](#), [Top panel](#)).

- Supported values: any color picked from the color palette
- Default value: light gray
- Example: black

Instructions:

1. Click on the color swatch next to **Main color** to display the color palette.
2. Pick any color from the **color palette**.



3. Click **OK** to confirm.

Note: shelves have a separate color parameter, so you can make the shelves a distinct color than the rest of the bay ([Shelf color](#)).

Shelf parameters (Create bays)

The below parameters apply to the shelves of the bay.

Shelf width

The physical width of the shelves in the current measurement unit.

- Supported values: positive numeric value [0-9 and decimal point]
- Default value: 200 cm (or equivalent according to [Measurement unit](#))
- Example: 180

Tip: You don't need to type the actual measurement unit (e.g., cm), only the value.

Shelf height

The physical height (thickness) of the shelves in the current measurement unit.

- Supported values: positive numeric value [0-9 and decimal point]
- Default value: 2 cm (or equivalent according to [Measurement unit](#))
- Example: 2.54

Tip: You don't need to type the actual measurement unit (e.g., cm), only the value.

Shelf depth

The physical depth of the shelves in the current measurement unit.

Supported values: positive numeric value [0-9 and decimal point]

Default value: 48 cm (or equivalent according to [Measurement unit](#))

Example: 30

Tip: You don't need to type the actual measurement unit (e.g., cm), only the value.

Shelf front margin

The distance at which products will be placed from the front edge of shelves.

This is useful if you want to leave some space for other items ([tester](#), [Accessory](#)) at the front of the shelves.

Supported values: positive/negative numeric value [+0-9 and decimal point] (based on [Measurement unit](#))

Default value: 0

Example: 8

Note: negative values allow products to overhang at the front edge of shelves.

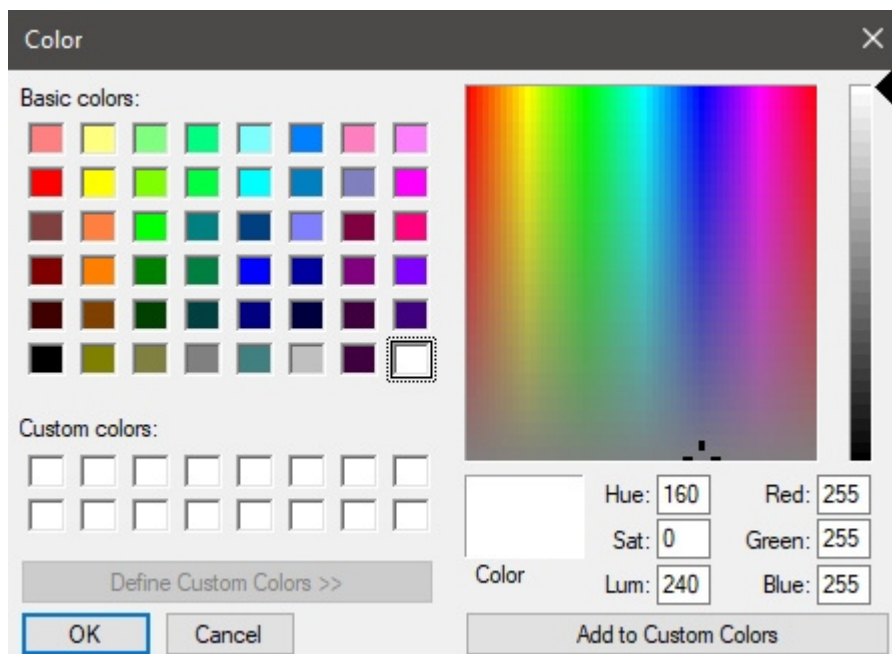
Shelf color

The color of the shelves.

- Supported values: any color picked from the color palette
- Default value: light gray
- Example: white

Instructions:

1. Click on the color swatch next to Shelf color to display the color palette.
2. Pick any color from the **color palette**.



3. Click **OK** to confirm.

Transparent shelves

Specifies whether shelves are translucent or opaque.

- Supported values:
 - *Checked*: shelves are translucent.
 - *Not checked*: shelves are opaque.
- Default value: *Not checked*

Tip: To simulate glass shelves, checkmark this and set Shelf color to white.

Parameters of the base

The below attributes define the base of the bay.

Base (Create bays)

Specifies the presence of a base on the bay.

- Supported values:
 - *Checked*: the bay will have a base.
 - *Not checked*: the bay will not have a base.
- Default value: *Checked*

Accept items (Base (Create bays))

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

- Supported values:
 - *Checked*: items can be placed on the base.
 - *Not checked*: items cannot be placed on the base.
- Default value: *Checked*

Base height

The physical height (thickness) of the base in the current measurement unit.

- Supported values: positive numeric value [0-9 and decimal point]
- Default value: 12 cm (or equivalent according to [Measurement unit](#))
- Example: 18.2

Tip: You don't need to type the actual measurement unit (e.g., cm), only the value.

Base depth

The physical depth of the base in the current measurement unit.

- Supported values: positive numeric value [0-9 and decimal point]
- Default value: 68 cm (or equivalent according to [Measurement unit](#))
- Example: 50

Tip: You don't need to type the actual measurement unit (e.g., cm), only the value.

Top panel parameters

The below attributes define a panel closing the bay at its top.

Top panel

Specifies the presence of a top panel on the bay. Checkmark this if your shelving unit should have a closed top.

- Supported values:
 - *Checked*: the bay will have a top panel.
 - *Not checked*: the bay will not have a top panel.
- Default value: *Not checked*

Note: This component is created as a Shelf. See description in [Shelf \(New bay components\)](#).

Accept items (Top panel)

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

- Supported values:
 - *Checked*: items can be placed on the top panel.
 - *Not checked*: items cannot be placed on the top panel.
- Default value: *Not checked*

Top panel height

The physical height (thickness) of the top panel in the current measurement unit.

- Supported values: positive numeric value [0-9 and decimal point]
- Default value: *10 cm* (or equivalent according to [Measurement unit](#))
- Example: *4*

Tip: You don't need to type the actual measurement unit (e.g., *cm*), only the value.

Top panel depth

The physical depth of the top panel in the current measurement unit.

- Supported values: positive numeric value [0-9 and decimal point]
- Default value: *40 cm* (or equivalent according to [Measurement unit](#))
- Example: *50*

Tip: You don't need to type the actual measurement unit (e.g., *cm*), only the value.

Parameters of Dividing panel (Create bays)

The below parameters apply to the vertical dividing panels of the bay.

Dividing panels let you create pigeon holes bays.

Note: When dividing panels are specified here, each shelf is split into separate shelves between the dividing panels. If you want dividing panels but you prefer to have single shelves across the whole

width, you should rather specify **0** dividing panels here when creating the bay, then add dividing panels to the bay later in Modify bays > [Dividing panel \(New bay components\)](#).

Number of dividing panels

The number of vertical dividing panels in the bay.

- Supported values: positive numeric value [0-9]
- Default value: 0
- Example: 12

Dividing panel width

The physical width of the dividing panels in the current measurement unit.

- Supported values: positive numeric value [0-9 and decimal point]
- Default value: 2 *cm* (or equivalent according to [Measurement unit](#))
- Example: 3.5

Tip: You don't need to type the actual measurement unit (e.g., *cm*), only the value.

Shelf height

The physical height (thickness) of the shelves in the current measurement unit.

- Supported values: positive numeric value [0-9 and decimal point]
- Default value: same value as [Overall height \(Create bays\)](#)
- Example: 2.4

Tip: You don't need to type the actual measurement unit (e.g., *cm*), only the value.

Back panel parameters (Create bays)

The below attributes define the back panel of the bay.

Back panel (Create bays)

Specifies the presence of a rear panel on the bay.

- Supported values:
 - *Checked*: the bay will have a back panel.
 - *Not checked*: the bay will not have a back panel.
- Default value: *Checked*

Accept items (Back panel (Create bays))

- Defines whether you can drag items on the back panel of the bay, typically products that are [pegged](#).

Supported values:

- *Checked*: items can be placed on the back panel.
- *Not checked*: items cannot be placed on the back panel.
- Default value: *Not checked*

Back panel top overhang

The vertical overhang of the back panel from the upmost shelf. This setting also influences [Value](#).

- Supported values: positive numeric value [0-9 and decimal point]
- Default value: 20 cm (or equivalent according to [Measurement unit](#))
- Example: 45

Back panel lateral overhangs

The lateral overhang of the back panel on each side of the shelves. If you set a positive value, this setting also influences [Overall width](#), effectively making the bay wider than the shelves.

- Supported values: positive/negative numeric value [+0-9 and decimal point] (based on [Measurement unit](#))
- Default value: 30 cm (or equivalent according to [Measurement unit](#))
- Example: 15

Tip: You don't need to type the actual measurement unit (e.g., cm), only the value.

Hook length (Back panel (Create bays))

The distance from the back panel to the tip of pegs. The specified length is then used to determine how many times each [pegged](#) product is repeated in depth on the hooks.

- Supported values: positive numeric value [0-9 and decimal point]
- Default value: 4 cm (or equivalent according to [Measurement unit](#))
- Example: 2.5

Notes:

You don't need to type the actual measurement unit (e.g., cm), only the value.

Each actual hook is created and displayed automatically when you place a product on the back panel.

The hooks can also be hidden if you prefer ([View peg hooks](#)).

Back panel depth

The physical depth (thickness) of the back panel in the current measurement unit.

- Supported values: positive numeric value [0-9 and decimal point]
- Default value: 4 cm (or equivalent according to [Measurement unit](#))
- Example: 2.5

Tip: You don't need to type the actual measurement unit (e.g., cm), only the value.

Side panels parameters

The below attributes define the side panels of the bay.

Side panels

Specifies the presence of side panels on the bay.

- Supported values:

- *Checked:* the bay will have a back panel.
 - *Not checked:* the bay will not have a back panel.
- Default value: *Not checked*

Note: each of these components is created as a Dividing panel. See description in [Dividing panel \(New bay components\)](#)

Side panel width

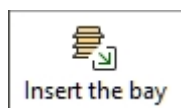
The physical width (thickness) of each side panel in the current measurement unit.

- Supported values: positive numeric value [0-9 and decimal point]
- Default value: 2 *cm* (or equivalent according to [Measurement unit](#))
- Example: 3.6

Tip: You don't need to type the actual measurement unit (e.g., *cm*), only the value.

Tools and commands (Create bays)

The task-specific toolbar includes a tool to create bays. It is described below.



The object editing toolbar and the general editing commands are also available to edit objects in your planogram while in this task.

Insert the bay

This command puts the new bay in the current project with the properties set in [Parameters \(Create bays\)](#).

Instructions:

1. Click on **Insert the bay** the toolbar or in the main **menu > Edit**.
2. Place your mouse cursor (shown as a specific insertion cursor) in the visualization area where you want to add the bay.
3. Click the left mouse button to confirm and create the bay.

The way the bays are placed depends on the state of [Free bay placement](#):

- With **Free bay placement** not checked:
 - If there is no existing bay: the new bay is centered on the ground.
 - If there is one existing bay: the new bay is placed adjacent to the existing bay, left or right, based on the cursor position.
 - If there are several existing bays: the new bay is placed adjacent to the existing bays, based on the cursor position: left, right or in-between, pushing them to make space in this last case.
- With **Free bay placement** checked: the bays are placed at the cursor position on the ground. If there are other bays at this position, they may overlap.

Tips:

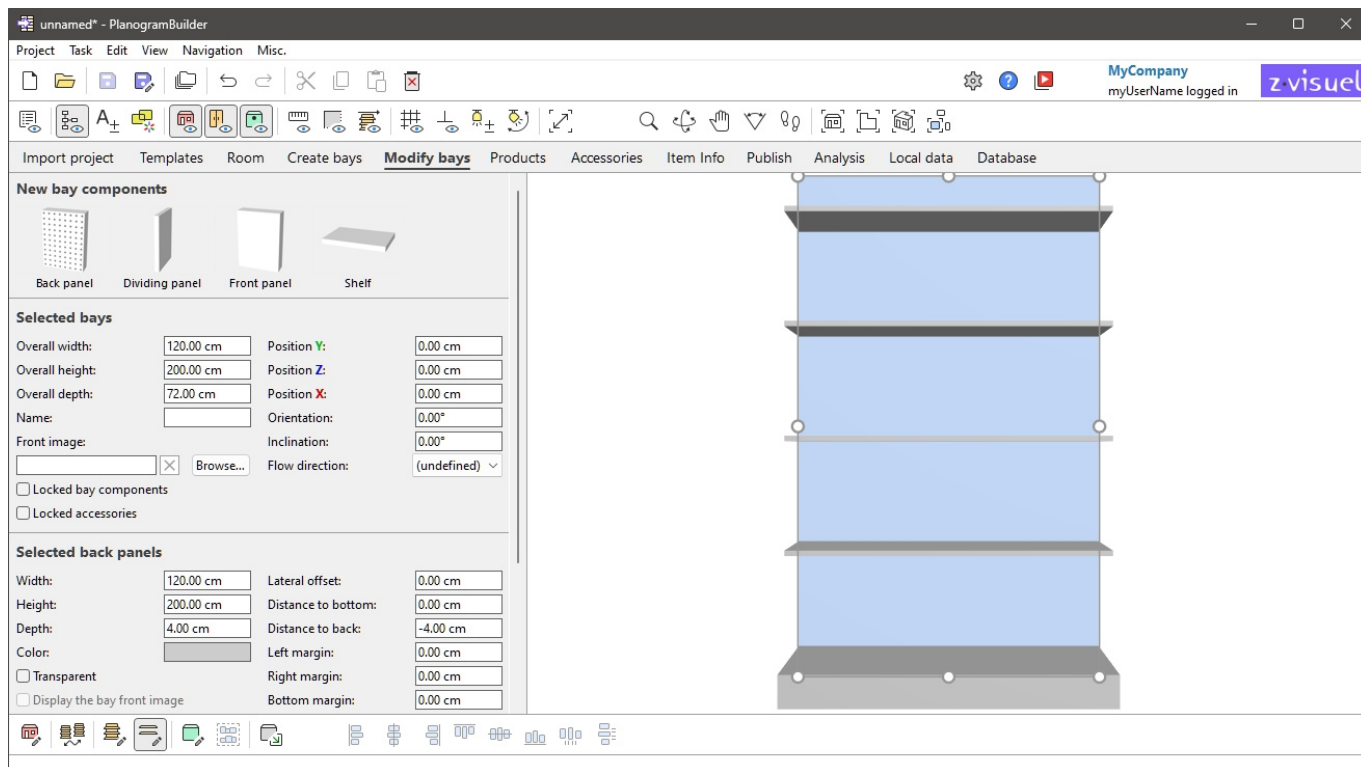
- Use this command several times to create multiple same bays.

- Just after you have defined and placed the desired bay in the planogram, it can be useful to save the project with the empty bay to be re-used as [Templates](#). You can name it for example "Template bay for store X"; then you just need to drag that template from [Template catalog](#) to start a new project with the same bay.
- To create new bays, you can also [Copy by moving \(Edit bays\)](#) from your planogram and then [Modify bays](#) to make the desired adjustments.
- If all parts of your bay have the same color, it may be difficult to distinguish each component. This problem can be solved with [View edges](#) .

Modify bays

Video tutorial on this topic: [11: Editing gondolas](#)

This task is where you can edit existing shelving in your planograms. This step is often necessary to obtain the exact dimensions and properties of the bay after [Create bays](#).



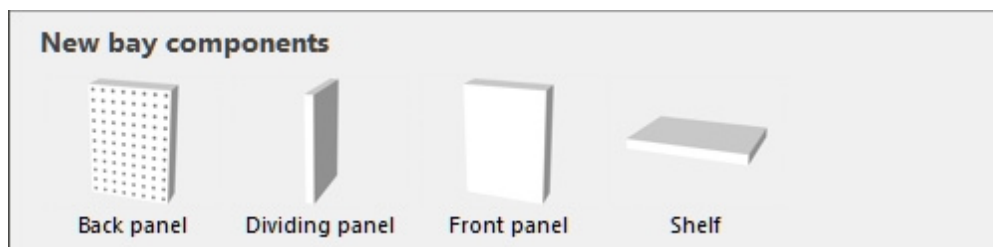
Note: You can disable editing of bays for Standard Users ([Standard users can edit bays](#)).

Tip: If all parts of your bay have the same color, it may be difficult to distinguish each component. This problem can be solved with [View edges](#).

New bay components

Parametric structural components are available to modify existing shelving in your planogram.

Typically, you will add new components to simulate shelving units which cannot be directly built with [Parameters \(Create bays\)](#).



Types of New bay components

The following new bay components are available.

Note: You can have several components of all types on the same bay.

Back panel (New bay components)

A component onto which you can place specific types of products ([pegged](#)) and accessories ([panel](#), [bay header](#)). Use this for pegboards and slat walls.

Dividing panel (New bay components)

A component which can be used as vertical separation to create pigeon holes or side panels.

This type of component is also suitable for any other structural part of furniture which are neither shelves, nor back panels, nor front panels, for example feet and posts.

Note: Products are not allowed to cross this component if [Collisions \(Selected bay components\)](#) is checkmarked for this component.

Front panel (New bay components)

A component best used to represent front doors or other front panels in your shelving units.

You cannot put products or accessories on this type of component, but it can be hidden in case you have products behind it (consult [View front panels](#)).

By default, front panels span the height and width of the bay and are positioned at its front.

Shelf (New bay components)

A component onto which you can place specific products ([standard](#), [stackable](#), [tester](#)) and accessories ([divider](#), [ondisplay](#), [presenter](#), [Shelf badge](#), [Shelf strip](#), [sticker](#), [tag](#)).

Adding New bay components

Instructions:

1. Make sure you have at least one bay in your planogram. Otherwise consult [Create bays](#).
2. Drag each desired new component from the palette onto the desired bay.
3. Change the properties of the new components if needed ([Selected bay components](#)).
4. Save your empty bay as a project if you wish to re-use it later.

Selected bays

This section lets you view and edit the properties of the selected bays.

Selected bays

Overall width:

80.00 cm

Position Y:

0.00 cm

Overall height:

140.00 cm

Position Z:

0.00 cm

Overall depth:

46.00 cm

Position X:

0.00 cm

Name:

Orientation:

0.00°

Front image:

×

Browse...

Inclination:

0.00°

☐ Locked bay components
 ☐ Locked accessories

Flow direction:

(undefined) ▾

Parameters of the whole bay (Selected bays)

These are parameters for the entire selected bay.

Overall width (Selected bays)

The physical width of the selected bays in the current measurement unit.

- Supported values: positive numeric value [0-9 and decimal point]
- Default value: selected bay width
- Example: 240

Changing this value resizes the whole bays in width. Note that the thickness of components is maintained, thereby letting you effectively create width variations of same bay.

Note: If multiple selected bays have different widths, no value is displayed, but you can still assign a common value by typing it in the textbox.

Tips:

- You don't need to type the actual measurement unit (e.g., *cm*), only the value.
- The overall width can also be defined with the mouse. Consult [Resize \(Edit bays\)](#).
- *Tip:* [View dimensions](#) onscreen is helpful when resizing shelving and components.

Overall height (Selected bays)

The physical height of the selected bays in the current measurement unit.

- Supported values: positive numeric value [0-9 and decimal point]
- Default value: selected bay height
- Example: 185

Changing this value resizes the whole bays in height. Note that the thickness of components is maintained, thereby letting you effectively create height variations of same bays.

Note: If multiple selected bays have different heights, no value is displayed, but you can still assign a common value by typing it in the textbox.

Tips:

- You don't need to type the actual measurement unit (e.g., *cm*), only the value.
- The overall height can also be defined with the mouse. Consult [Resize \(Edit bays\)](#).

- *Tip:* [View dimensions](#) onscreen is helpful when resizing shelving and components.

Overall depth (Selected bays)

The physical depth of the selected bays in the current measurement unit.

- Supported values: positive numeric value [0-9 and decimal point]
- Default value: selected bay depth
- Example: 62

Changing this value resizes the whole bays in depth. Note that the thickness of components is maintained, thereby letting you effectively create depth variations of same bay.

Note: If multiple selected bays have different depths, no value is displayed, but you can still assign a common value by typing it in the textbox.

Tips:

- You don't need to type the actual measurement unit (e.g., *cm*), only the value.
- The overall depth can also be defined with the mouse. Consult [Resize \(Edit bays\)](#).
- [View dimensions](#) onscreen is helpful when resizing shelving and components.

Position Y (Selected bays)

The position of the selected bays on the Y axis in the current measurement unit.

- Supported values: positive/negative numeric value [+0-9 and decimal point]
- Default values: none (the initial position depends on where the component was dragged)
- Example: 0



Example of a bay position (placed at 0, 0, -100)

Note: The tripod with colored axes is also shown in the visualization area, indicating the space origin point (0, 0, 0) and the direction of each axis.

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

Tip: The position can also be defined with the mouse. Consult [Move \(Edit bays\)](#).

Position Z (Selected bays)

The position of the selected bays on the Y axis in the current measurement unit.

- Supported values: positive/negative numeric value [+/-9 and decimal point]
- Default values: none (the initial position depends on where the component was dragged)
- Example: 420



Example of a bay position (placed at 0, 0, -100)

Note: The tripod with colored axes is also shown in the visualization area, indicating the space origin point (0, 0, 0) and the direction of each axis.

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

Tip: The position can also be defined with the mouse. Consult [Move \(Edit bays\)](#).

Position X (Selected bays)

The position of the selected bays on the Y axis in the current measurement unit.

- Supported values: positive/negative numeric value [+/-9 and decimal point]
- Default values: none (the initial position depends on where the component was dragged)
- Example: -200



Example of a bay position (placed at 0, 0, -100)

Note: The tripod with colored axes is also shown in the visualization area, indicating the space origin point (0, 0, 0) and the direction of each axis.

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

Tip: The position can also be defined with the mouse. Consult [Move \(Edit bays\)](#).

Orientation

The angle of the bays in degrees around the vertical axis (**Z**). A value of 0 is the default value.

- Supported values: positive/negative numeric value [+0-9 and decimal point]
- Default value: 0 (the bay faces the screen in [Default view](#))
- Example: 90

Note: when you change the orientation value of multiple bays, they are rotated around their respective axis and maintain their original positions.

Tip: if you rather want to reorient several bays as a whole block with a common rotation axis, use [Rotate bays](#) instead.

Inclination (Selected bays)

The angle of the bays in degrees around the horizontal axis (**Y**).

- Supported values: positive/negative numeric value [+0-9 and decimal point]
- Default value: 0 (the bay is vertical)
- Example: 20

Flow direction

Indicates which way people are most likely to travel in the aisle where the selected bays are located.

- Supported values:
 - **(undefined)**: no specific direction.
 - **to right**: people walk from left to right of the bay seen from the front.
 - **to left**: people walk from right to left of the bay seen from the front.
- Default value: **(undefined)**
- Example: **to right**

Note: Consult [View flow direction](#) to learn how to indicate direction follow with arrows on the screen.

Bay name

Descriptive name of the selected bay.

The name can then be displayed [Show label](#) on the bay in [Schematic view](#), as well as in [Project item list](#) and in [Reports](#). This is useful to identify each shelving unit in your planograms.

- Supported values: text, including Unicode characters for non-Latin text values
- Default value: empty (= no name)
- Example: *my drink cooler*

Front image

An image displayed on the front face of the bay for a more realistic look.

- Supported value: image file in supported format (*jpg, png, bmp, gif, tif*)
- Default value: empty (= no image)
- Example: *my_brand_gondola.jpg*



Example with an image applied to the base and the top panel of a bay

Instructions:

1. Click on **Browse**.
2. Select the desired image file on your PC.
3. Click on **Open**.
4. Wait for the image to upload.

To remove the background image, click on the small **red cross** button.

Notes:

- The image is only be displayed on bay components that have [Display the bay front image](#) checkmarked.
- The image is automatically stretched to fit the overall dimensions of the components that have [Display the bay front image](#) checkmarked.

Locked bay components

Toggles the possibility to modify the selected bays.

This is useful to prevent accidental modification of shelving.

- Supported values:
 - *Checkmarked:*
 - The bay and its components can still be selected, but their properties cannot be changed any more, except the parameters Locked bay components and [Locked accessories](#).

- Existing components cannot be moved with the mouse.
- Existing components cannot be deleted from the bay.
- New components cannot be added to the bay.
- *Not checkmarked:* The bay and its components can be modified.

- Default value: *Not checkmarked*

Note: The chosen value is saved with the project for each bay.

Locked accessories

Toggles locking the accessories on the selected bays.

This is useful to prevent accidental changes of the accessories placed on the bay. Let's suppose you have created a bay with several accessories such as [bay header](#), [panel](#) and [Shelf strip](#). Locking accessories will allow you to add and move products on the shelves without risking displacing the accessories at the same time.

- Supported values:
 - *Checkmarked:* Accessories can't be moved, deleted or added on the bay.
 - *Not checkmarked:* Accessories can be moved, deleted and added on the bay.
- Default value: *Not checkmarked*

Note: The chosen value is saved with the project for each bay.

Selected bay components

This section lets you view and edit the properties of the selected bay components.

Some parameters are common to all type of components, while others are specific to their type, as shown below.

Tip: If all parts of your bay have the same color, it may be difficult to distinguish each component. This problem can be solved with [View edges](#) .

Common parameters (Selected bay components)

All types of bay components share the following common properties.

Selected bay components

Width:	<input type="text" value="20.00 cm"/>	Lateral offset:	<input type="text" value="0.00 cm"/>
Height:	<input type="text" value="80.00 cm"/>	Distance to bottom:	<input type="text" value="30.00 cm"/>
Depth:	<input type="text" value="30.00 cm"/>	Distance to back:	<input type="text" value="-2.00 cm"/>
Color:	<input type="color" value="#cccccc"/>		
<input type="checkbox"/> Transparent			
<input type="checkbox"/> Display the bay front image			
<input type="checkbox"/> Collisions			

Width (Selected bay components)

The physical width of the selected components in the current measurement unit.

- Supported values: positive numeric value [0-9 and decimal point]
- Default value: selected component width
- Example: 240

Changing this value resizes the components in width.

Note: If multiple selected components have different widths, no value is displayed, but you can still assign a common value by typing it in the textbox.

Tip: You don't need to type the actual measurement unit (e.g., *cm*), only the value.

Tip: The width can also be defined with the mouse. Consult [Resize \(Edit bay components\)](#).

Height (Selected bay components)

The physical height of the selected components in the current measurement unit.

- Supported values: positive numeric value [0-9 and decimal point]
- Default value: selected component height
- Example: 2.5

Changing this value resizes the components in height.

Note: If multiple selected components have different heights, no value is displayed, but you can still assign a common value by typing it in the textbox.

Tip: You don't need to type the actual measurement unit (e.g., *cm*), only the value.

Tip: The height can also be defined with the mouse. Consult [Resize \(Edit bay components\)](#).

Depth (Selected bay components)

The physical depth of the selected components in the current measurement unit.

- Supported values: positive numeric value [0-9 and decimal point]
- Default value: selected component depth
- Example: 45

Changing this value resizes the components in depth.

Note: If multiple selected components have different depths, no value is displayed, but you can still assign a common value by typing it in the textbox.

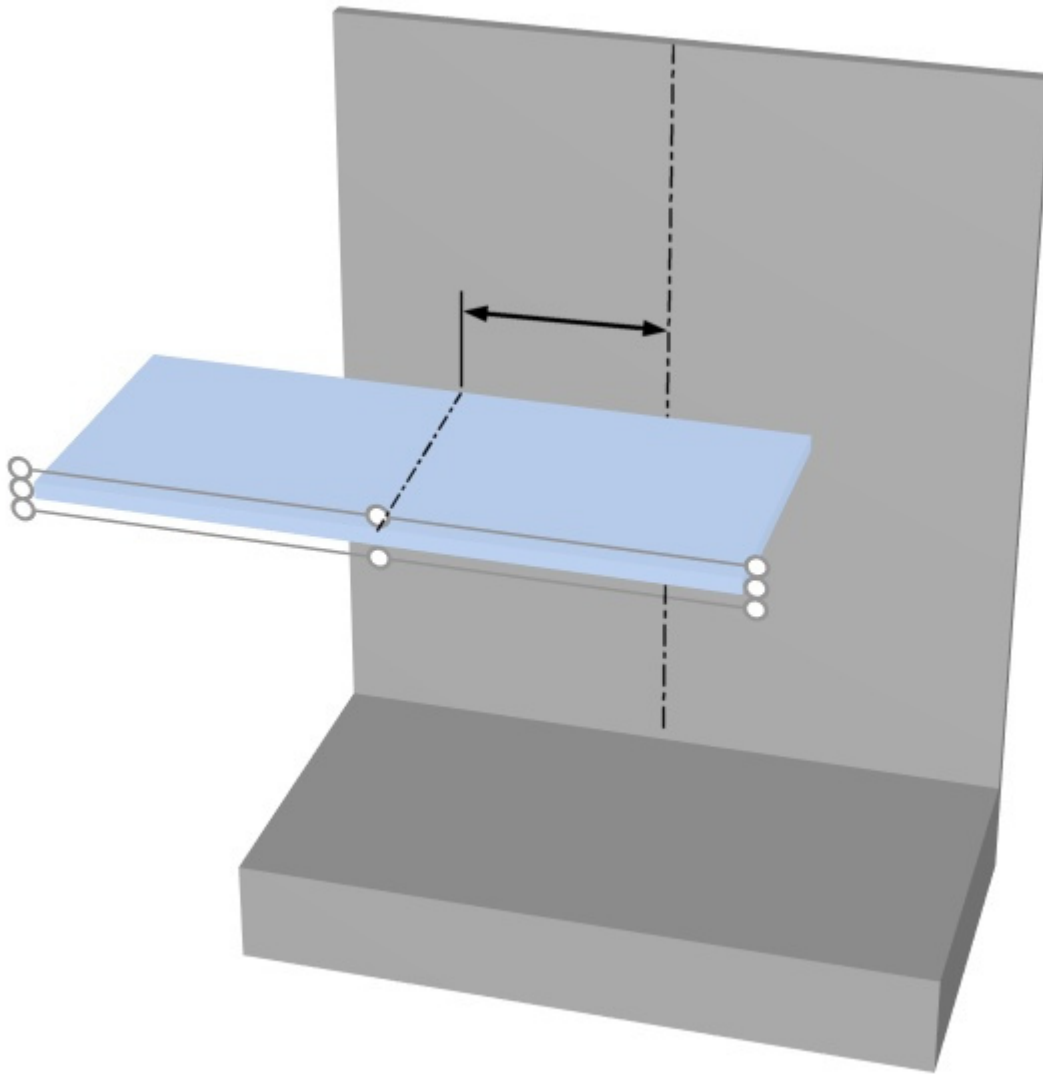
Tip: You don't need to type the actual measurement unit (e.g., *cm*), only the value.

Tip: The depth can also be defined with the mouse. Consult [Resize \(Edit bay components\)](#).

Lateral offset (Selected bay components)

The left or right offset of the selected components relative to the center of the original bay. Negative values move the component to the left, positive values move it to the right.

- Supported values: positive/negative numeric value [+/-0-9 and decimal point]
- Default value: 0
- Example: -24



The arrow represents Lateral offset (Selected bay components)

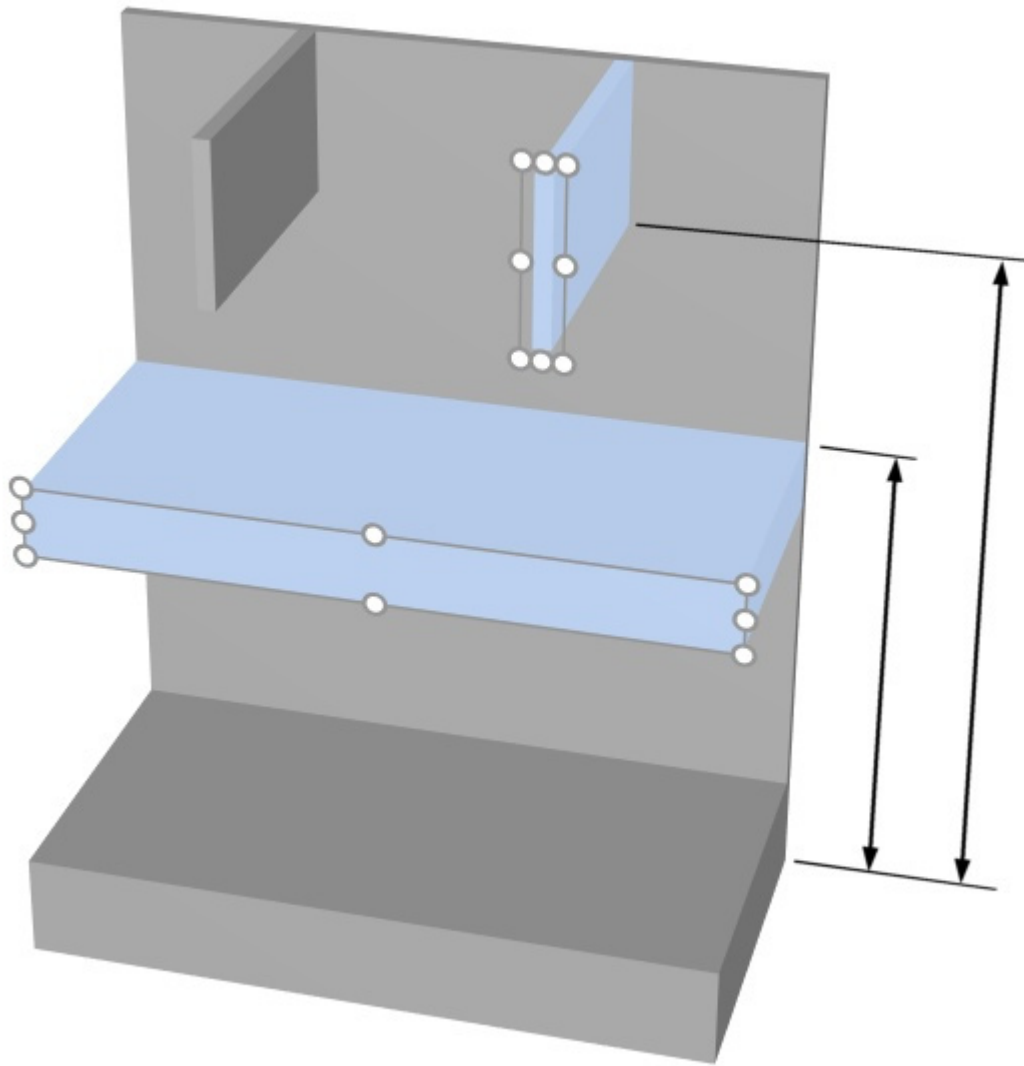
Tip: You can also move the components with the mouse. Consult [Move \(Edit bay components\)](#).

Warning: Do not use this parameter to move an entire bay (by offsetting all its components). Use instead [Position Y \(Selected bays\)](#) for this purpose.

Distance to bottom

The vertical distance from the bottom of the selected components to the bottom of the bay. Shelves are an exception for which the distance is measured from the top of the shelf, making it easier to specify the actual position of the shelf surface relative to the bottom of the bay (typically the floor).

- Supported values: positive/negative numeric value [+0-9 and decimal point]
- Default value: none
- Example: 64.25



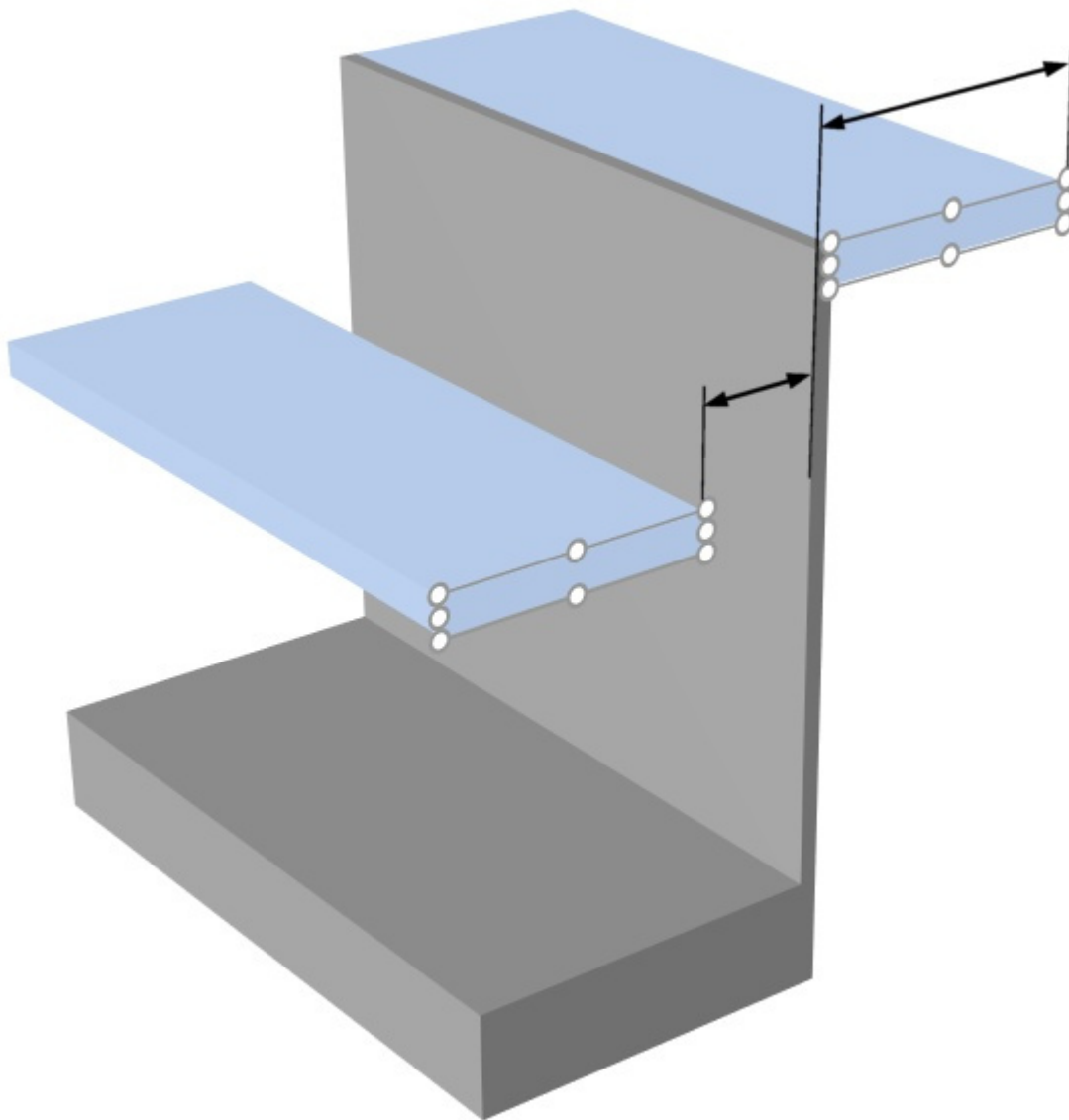
The arrows represent Distance to bottom

Tip: Distance to bottom can also be defined with the mouse. Consult [Move \(Edit bay components\)](#).

Distance to back

The distance from the back of the selected components to the bay origin (normally the rear of shelves after the initial creation of bay).

- Supported values: positive/negative numeric value [+ - 0-9 and decimal point]
- Default value: *0*
- Example: *10*



The arrows represent Distance to back

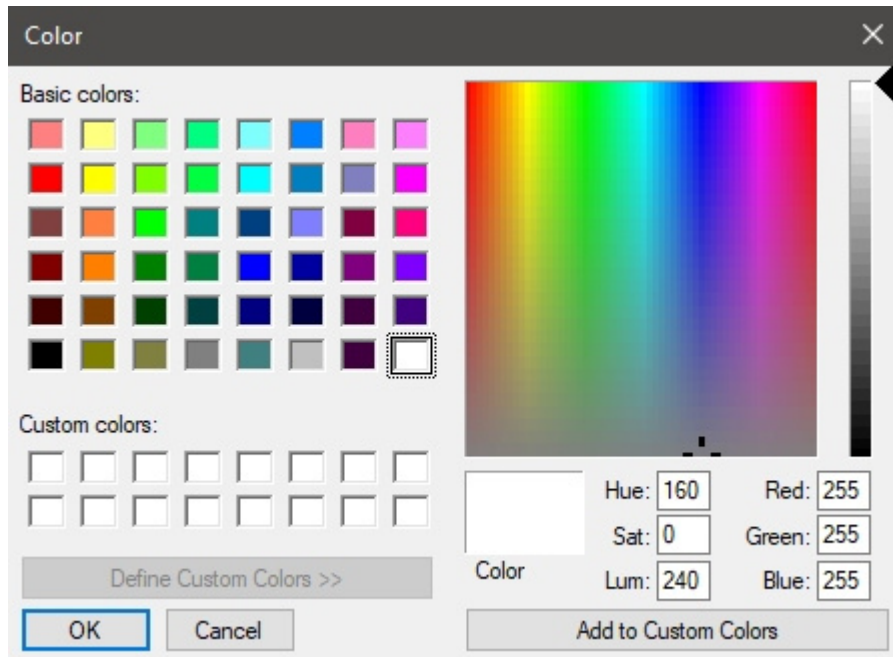
Color (Selected bay components)

The color of the selected components.

- Supported values: any color picked from the color palette
- Default value: the selected component color
- Example: black

Instructions:

1. Click on the color swatch next to Color to display the color palette.
2. Pick any color from the **color palette**.



3. Click **OK** to confirm.

Transparent

Specifies whether the selected components are translucent or opaque.

- Supported values:
 - *Checkmarked*: translucent components.
 - *Not checkmarked*: opaque components.
- Default value: *Not checkmarked*

Tip: To simulate glass, checkmark this and set [Color \(Selected bay components\)](#) to white.

Display the bay front image

Determines if the front image of the bay is displayed on the front of the selected components.

- Supported values:
 - *Checkmarked*: the image is displayed on the selected components.
 - *Not checkmarked*: the image is not displayed on the selected components.
- Default values:
 - For Base, Top panel, Side panels: *Checkmarked*
 - For Back panel, Dividing panel, Front panel, Shelf: *Not checkmarked*

Note: Consult [Front image](#) for details on assigning the image to the bay.

Collisions (Selected bay components)

Determines if the selected bay components will block products and accessories when they are moved against it/them. This parameter has no effect when moving bay components against each other; bay components can always overlap with one another.

- Supported values:

- *Checkmarked*: products and accessories collide against the selected components.
 - *Not checkmarked*: products and accessories don't collide against the selected components.
- Default value: *Not checkmarked*

Tip: Checkmark this for components which should act as a physical barrier for products, such as vertical separations.

Note: This parameter has no effect if [Collisions \(Settings\)](#) is not checkmarked.

Parameters (Selected shelves)

Shelves have additional specific parameters described below.

Selected shelves			
Width:	<input type="text" value="72.00 cm"/>	Lateral offset:	<input type="text" value="0.00 cm"/>
Height:	<input type="text" value="4.00 cm"/>	Distance to bottom:	<input type="text" value="52.00 cm"/>
Depth:	<input type="text" value="40.00 cm"/>	Distance to back:	<input type="text" value="2.00 cm"/>
Color:	<input type="text" value=""/>	Left margin:	<input type="text" value="0.00 cm"/>
<input type="checkbox"/> Transparent		Right margin:	<input type="text" value="0.00 cm"/>
<input type="checkbox"/> Display the bay front image		Front margin:	<input type="text" value="0.20 cm"/>
<input type="checkbox"/> Collisions		Inclination:	<input type="text" value="0.00°"/>
<input checked="" type="checkbox"/> Accept items		Max. of products on width:	<input type="text" value="-"/>
<input type="checkbox"/> Allow lateral overhang		Gap to shelf below:	<input type="text" value="32.00 cm"/>

Allow lateral overhang (Selected shelves)

Determines if products and accessories can overhang the side edges of the selected shelves. This also allows placing products straddling two adjacent shelves, even across separate bays.

- Supported values:
 - *Checkmarked*: items can extend past the lateral edges of the shelves, but only by maximum half the item width.
 - *Not checkmarked*: items cannot extend past the lateral edges of the shelves.
- Default value: *Not checkmarked*



Arrows showing products overhanging a shelf and a back panel (*Allow lateral overhang (Selected back panels)*).

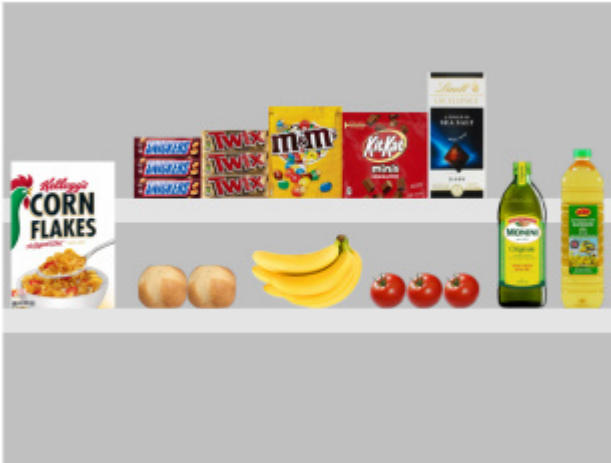
Behind products

Only applicable to PlanogramBuilder Light version.

Determines if the selected shelves are moved behind products that are positioned on lower shelves.

Since the depth of shelves cannot be specified in the Light version, this parameter is useful to simulate shelves that are shorter than others, thereby allowing tall products on deep shelves placed in front of short shelves above.

- Supported values:
 - *Checked:* the selected shelves are shown behind (doesn't cover) products placed on shelves below.
 - *Not checked:* the selected shelves partially cover products placed on shelves below.
- Default value: *Not checked*



Behind products: Checkmarked



Behind products: Not checkmarked

Accept items (Selected shelves)

Defines whether you can place products and accessories on the selected shelves.

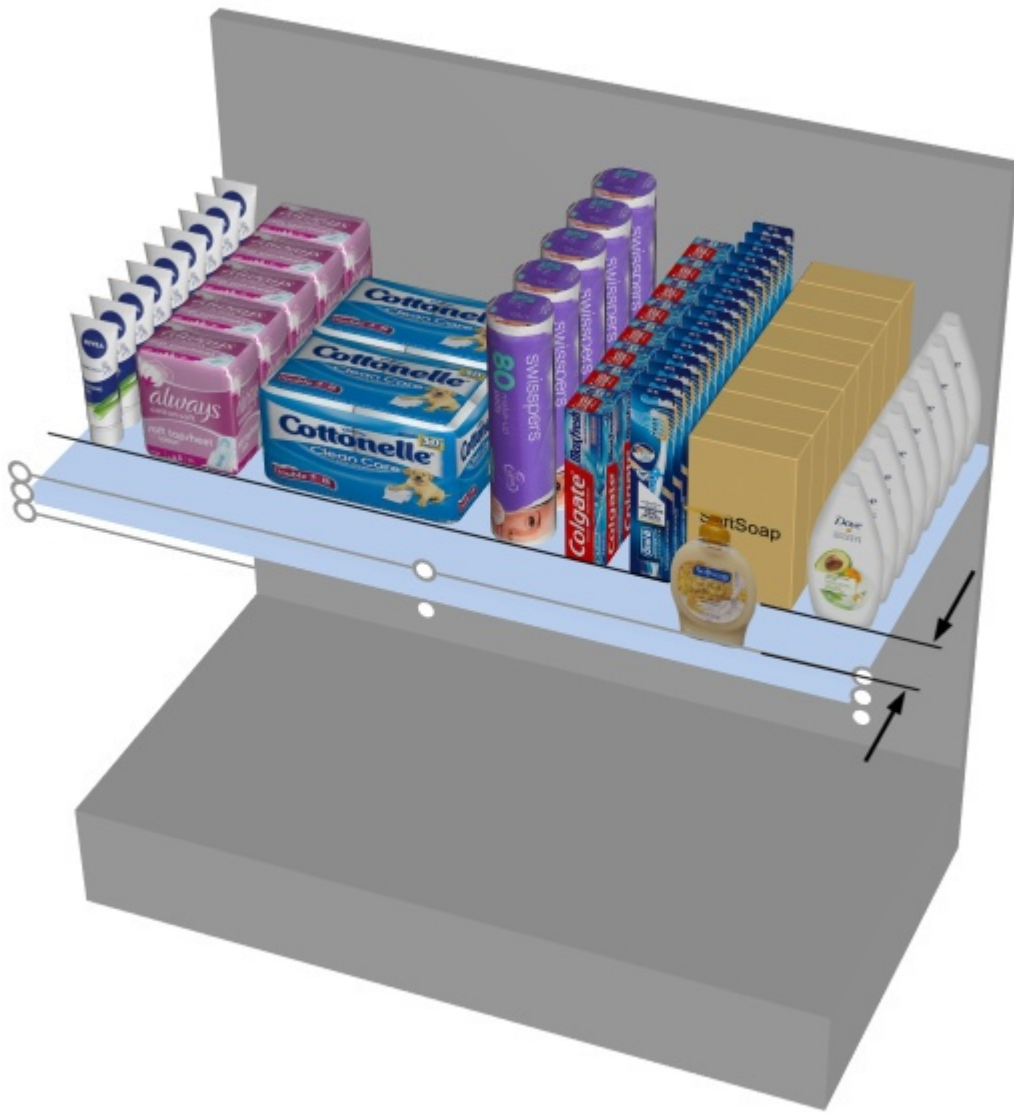
- Supported values:
 - *Checkmarked*: products and accessories can be placed on the selected shelves.
 - *Not checkmarked*: products and accessories can't be placed on the selected shelves.
- Default value: the value(s) chosen in [Create bays](#)

Front margin (Selected shelves)

The distance at which products can be placed from the front edge of shelves.

This is useful if you want to leave some space for other items ([tester](#), [Accessory](#)) at the front of the shelves.

- Supported values: positive/negative numeric value [+0-9 and decimal point] (based on [Measurement unit](#))
- Default value: 0
- Example: 8



The arrows represent Front margin

Note: negative values allow products to overhang at the front edge of shelves.

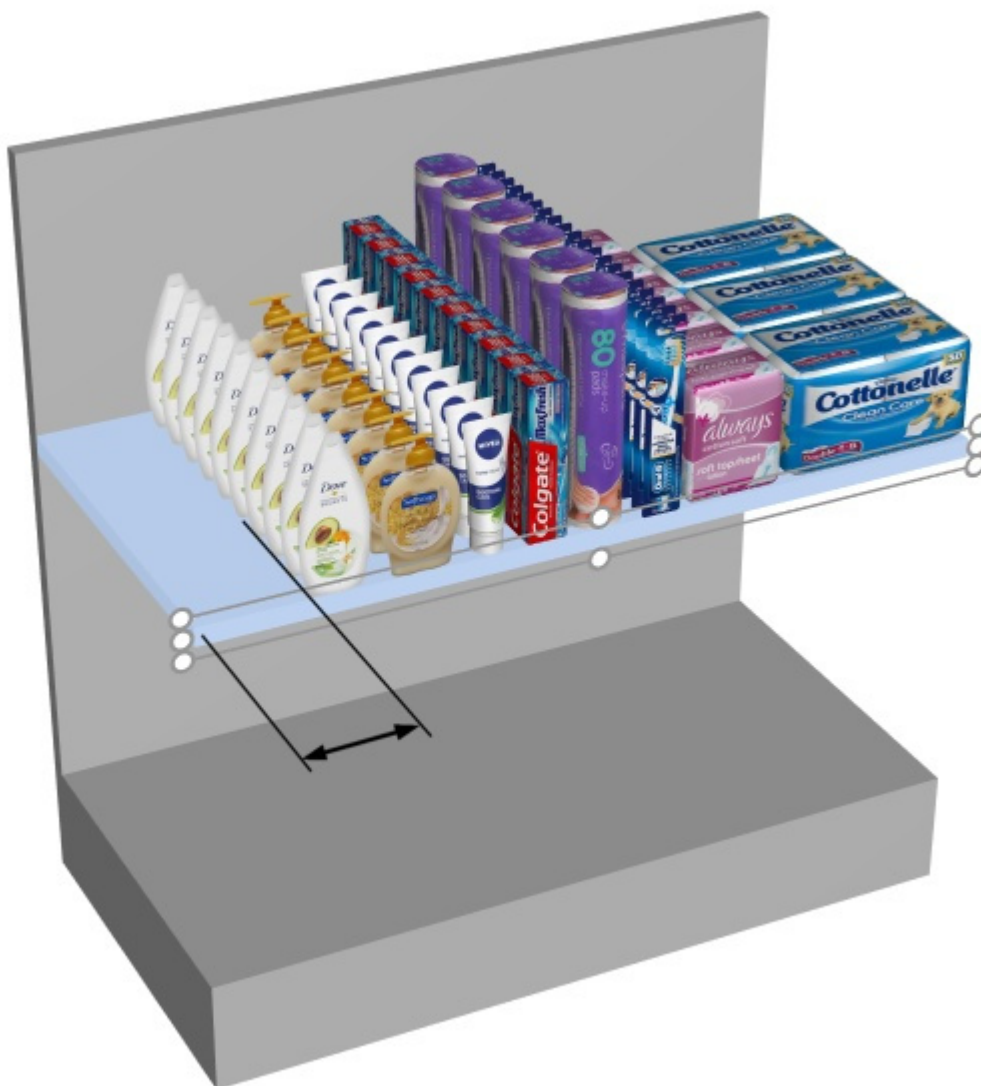
Left margin (Selected shelves)

The distance from the left edge of the shelf beyond which products cannot be placed.

- Supported values: positive numeric value [0-9 and decimal point] (based on [Measurement unit](#))
- Default value: 0
- Example: 15

The default value of 0 lets you place products all the way to the left edge of the shelf.

A value of 8 lets you place products on the whole shelf except on the last 8 mm/cm/m/inches on the left part of the shelf.



The arrow represents Left margin on a shelf.

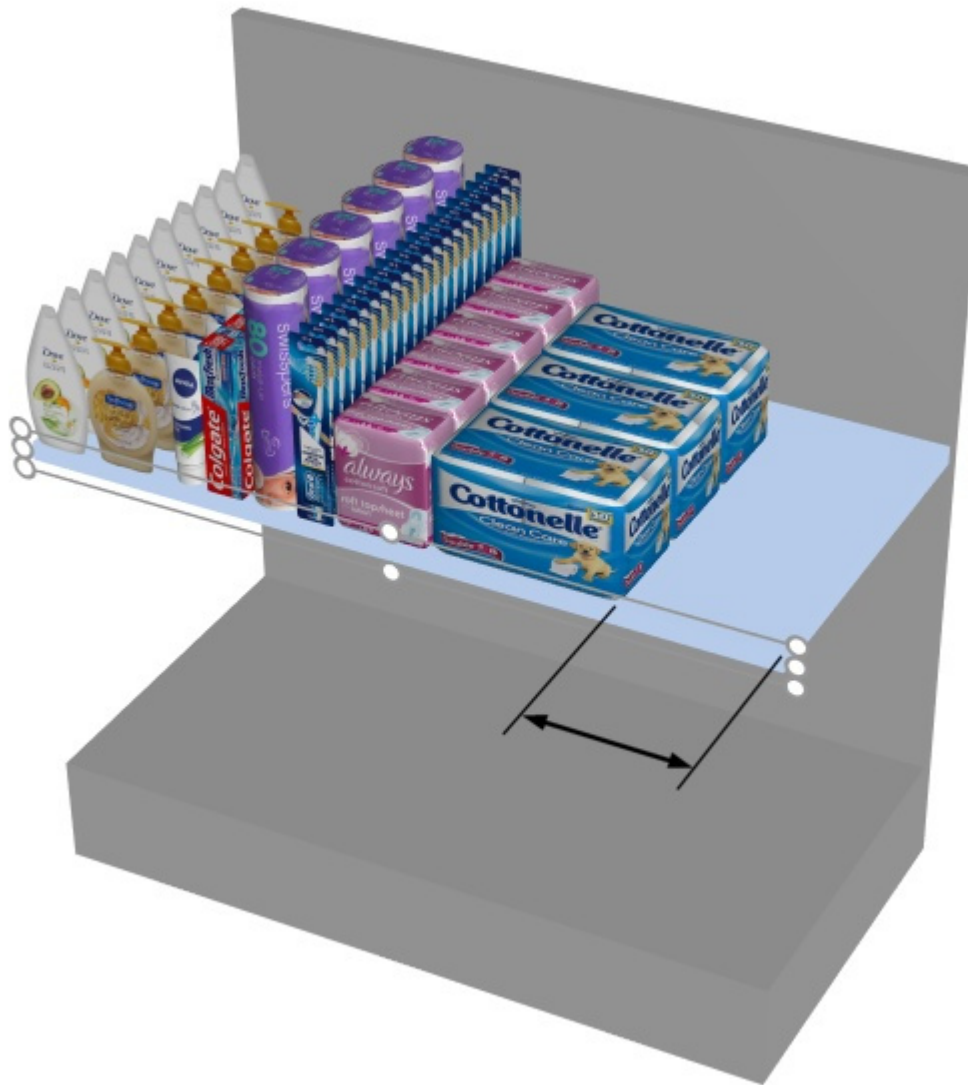
Right margin (Selected shelves)

The distance from the right edge of the shelf beyond which products cannot be placed.

- Supported values: positive numeric value [0-9 and decimal point] (based on [Measurement unit](#))
- Default value: 0
- Example: 15

The default value of 0 lets you place products all the way to the right edge of the shelf.

A value of 10 lets you place products on the whole shelf except on the last 10 mm/cm/m/inches on the right part of the shelf.



The arrow represents Right margin

Inclination (Selected shelves)

The angle of the selected shelves in degrees around the horizontal axis (**Y**).

- Supported values: positive/negative numeric value [+0-9 and decimal point]
- Default value: 0 (the shelf is horizontal)
- Example: -15

Note: All products on the shelf will also be leaning.

Max. of products on width

Only applicable to Shelf

The maximum number of products that can be placed along the width of the shelf.

A block of multiple same products also counts as one product.

- Supported values: positive numeric value [0-9] (based on [Measurement unit](#))

- Default value: - (= no maximum. You can place as many products as fit on the shelf.)
- Example: 3

Gap to shelf below

The vertical space between each selected shelf and the shelf just below. This is convenient to ensure enough vertical space based on your product heights.

- Supported values: positive numeric value [0-9 and decimal point] (based on [Measurement unit](#))
- Default value: the existing gap if applicable.
- Example: 30.5

Note: Entering a value for this parameter overwrites [Distance to bottom](#).

Note: This parameter is not available for the lowest shelf of a bay.

Tip: Select several shelves and apply the same value to quickly obtain regularly spaced shelves.

Parameters (Selected back panels)

Back panels have additional specific parameters described below.

Selected back panels

Width:
Height:
Depth:
Color:

☐ Transparent
☐ Display the bay front image
☐ Collisions
☒ Accept items
☐ Allow lateral overhang

Lateral offset:
Distance to bottom:
Distance to back:
Left margin:
Right margin:
Bottom margin:
Top margin:

Back panel type:
☐ Solid
☒ Pegboard
☐ Slatwall

☒ View holes / slats

Horizontal step:
Vertical step:
Hook length:

Allow lateral overhang (Selected back panels)

Determines if products and accessories can overhang the side edges of the selected back panels. This also allows placing products straddling two adjacent back panels, even across separate bays.

- Supported values:
 - *Checked:* items can extend past the lateral edges of the back panels, but only by maximum half the item width.
 - *Not checked:* items cannot extend past the lateral edges of the back panels.
- Default value: *Not checked*



Arrows showing products overhanging a back panel and a shelf (*Allow lateral overhang (Selected shelves)*).

Accept items (Selected back panels)

Defines whether you can place products and accessories on the selected back panels.

- Supported values:
 - *Checked*: products and accessories can be placed on the selected back panels.
 - *Not checked*: products and accessories can't be placed on the selected back panels.
- Default value: the value(s) chosen in **Create bays**

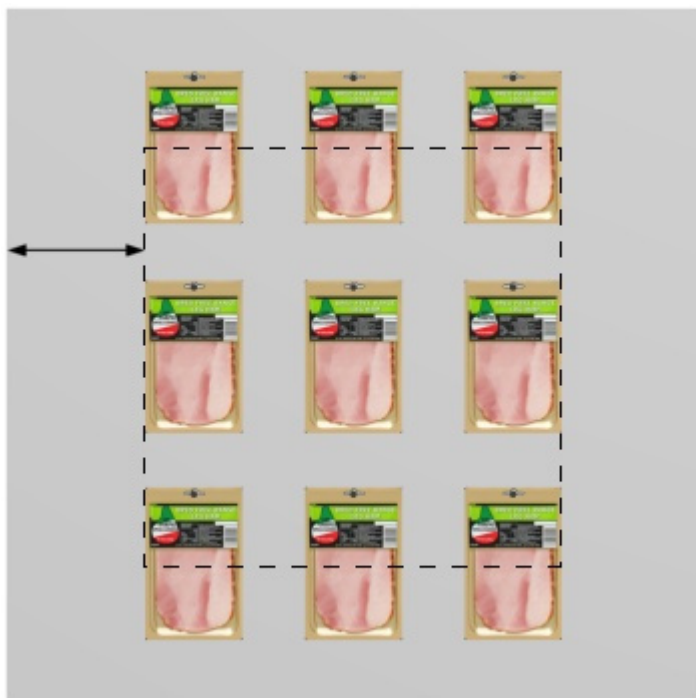
Left margin (Selected back panels)

The distance from the left edge of the back panel beyond which products cannot be placed.

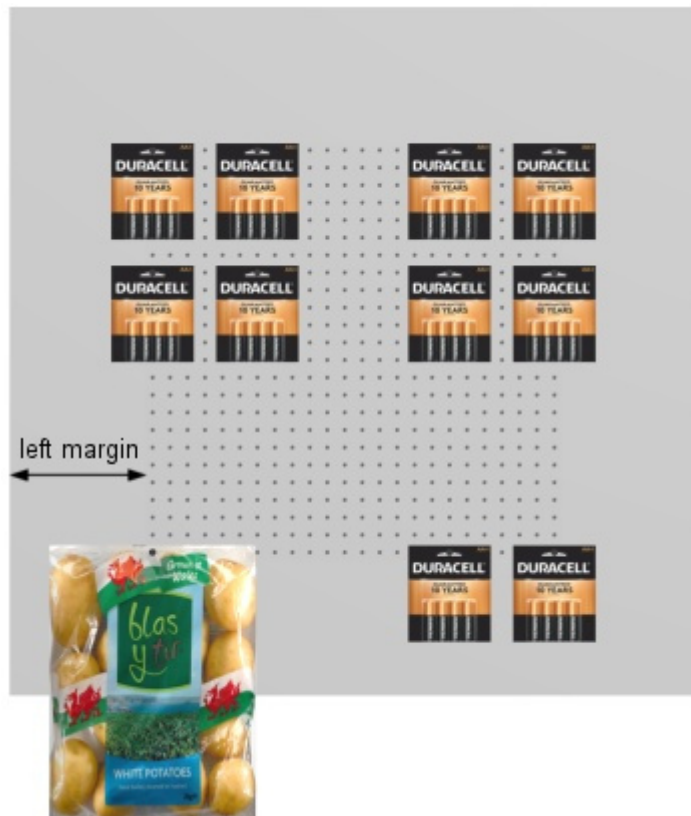
- Supported values: positive numeric value [0-9 and decimal point] (based on **Measurement unit**)
- Default value: 0
- Example: 15

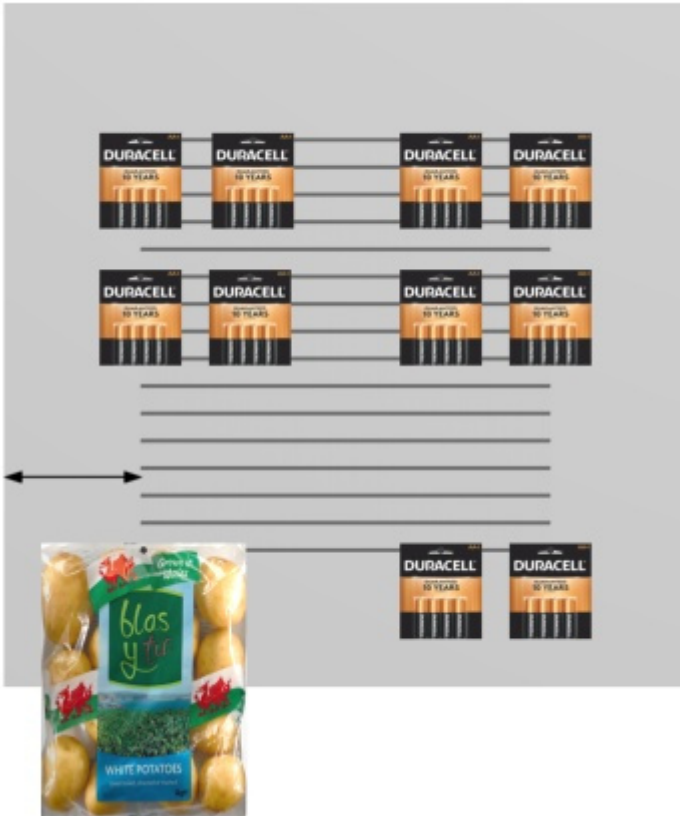
This margin has a different effect depending on [Back panel type](#):

- **Solid:** products cannot go beyond the margin (shown as a dashed rectangle below). They are constrained to the left by the margin (unless [Allow lateral overhang](#) is checkmarked).



- **Pegboard, Slatwall:** the margin defines the limit of peg holes or slats. Products are constrained to the left by the back panel lateral edges (unless [Allow lateral overhang](#) is checkmarked).





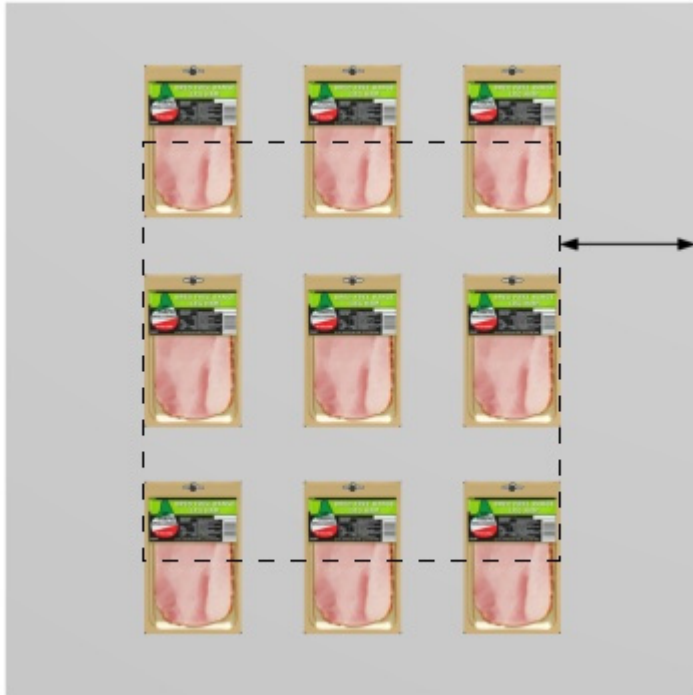
Right margin (Selected back panels)

The distance from the right edge of the back panel beyond which products cannot be placed.

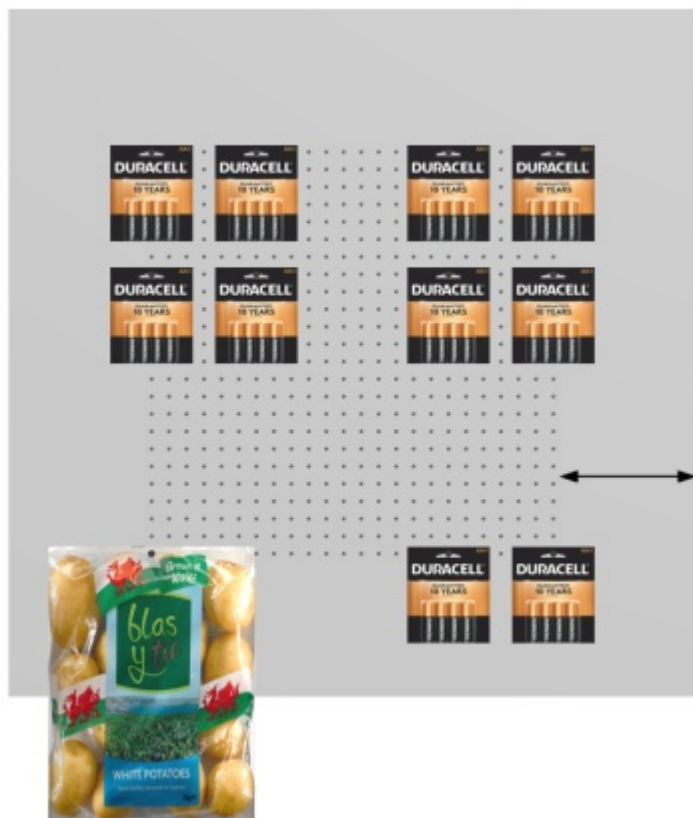
- Supported values: positive numeric value [0-9 and decimal point] (based on [Measurement unit](#))
- Default value: 0
- Example: 4.5

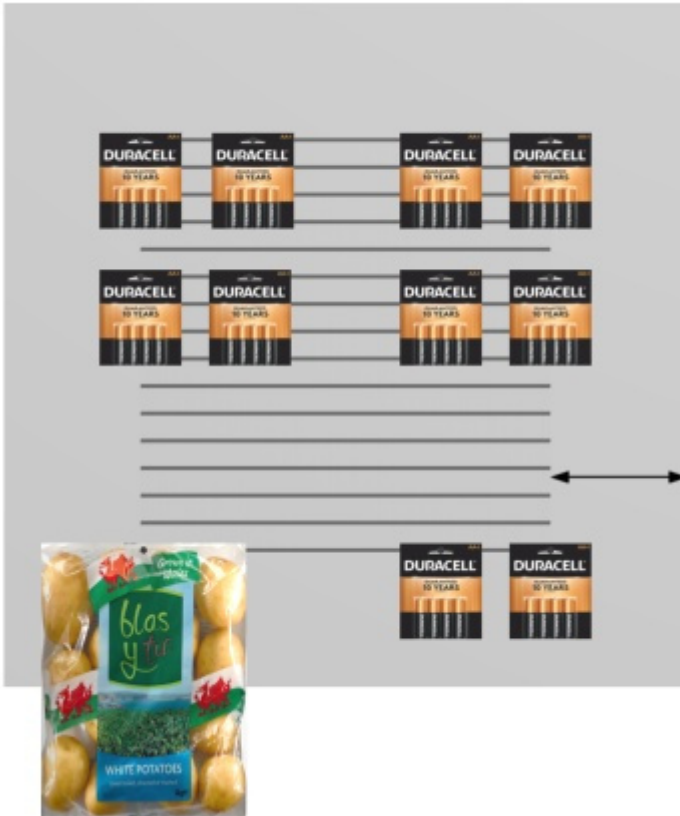
This margin has a different effect depending on [Back panel type](#):

- **Solid:** products cannot go beyond the margin (shown as a dashed rectangle below). They are constrained to the right by the margin (unless [Allow lateral overhang](#) is checkmarked).



- **Pegboard, Slatwall:** the margin defines the limit of peg holes or slats. Products are constrained to the right by the back panel lateral edges (unless [Allow lateral overhang](#) is checkmarked).





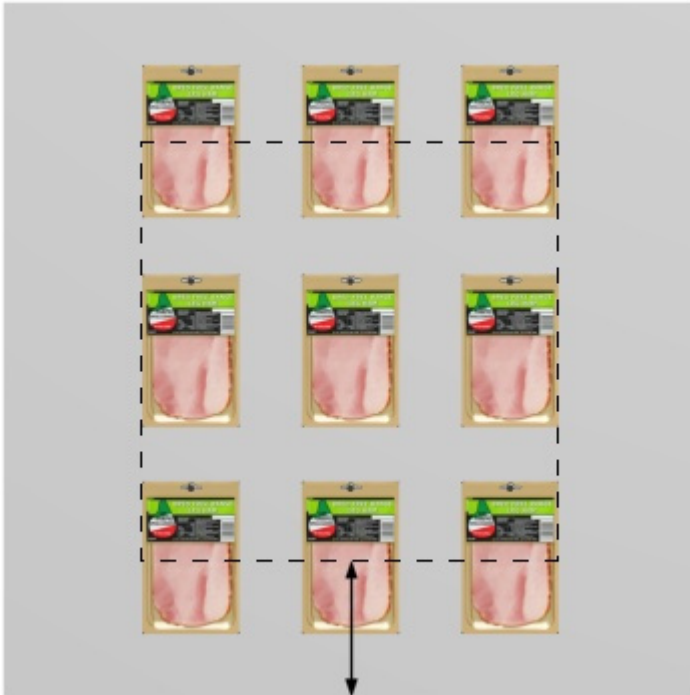
Bottom margin (Selected back panels)

The distance from the bottom edge of the back panel beyond which products cannot be placed.

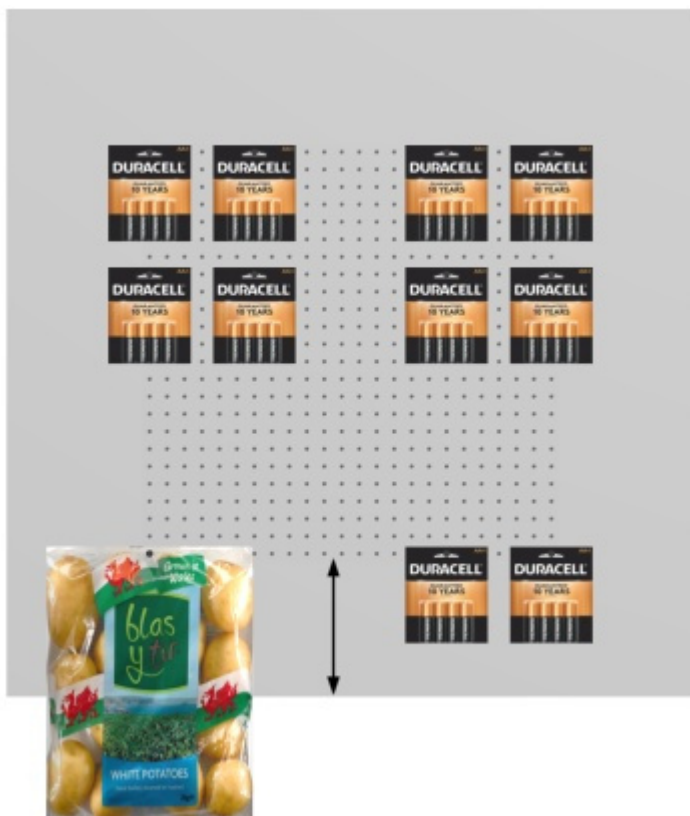
- Supported values: positive/negative numeric value [+/-0-9 and decimal point] (based on [Measurement unit](#))
- Default value: 0
- Example: -6

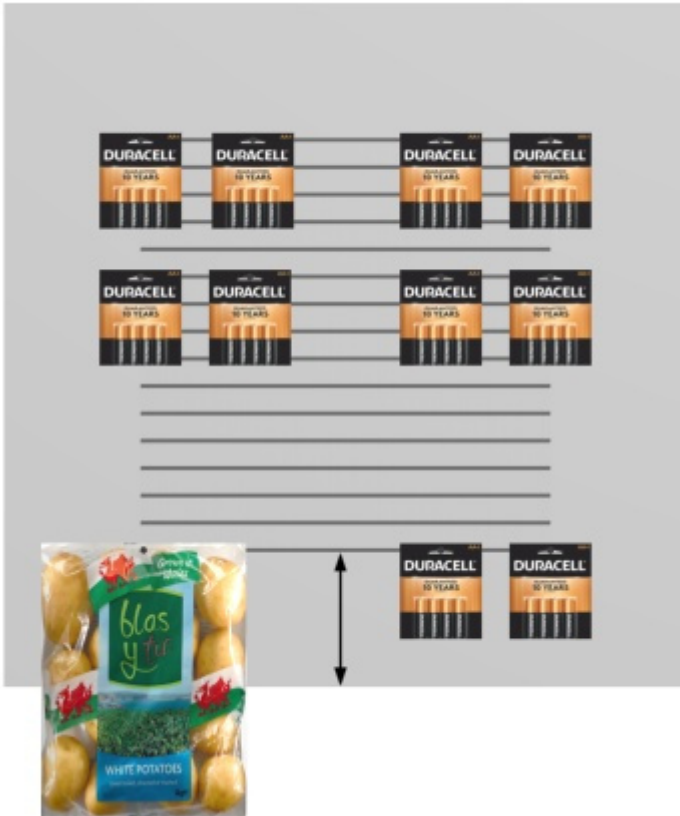
This margin has a different effect depending on [Back panel type](#):

- **Solid**: half of the product height is allowed to overflow the margin.



- **Pegboard, Slatwall:** the margin defines the lower limit of the area with peg holes or slats. Products can use all available peg holes or slat area. They can overhang below the back panel (as in the potato bag below).





Note: Negative values allow moving products and accessories completely below the back panel. (They must first be placed on the actual panel.)

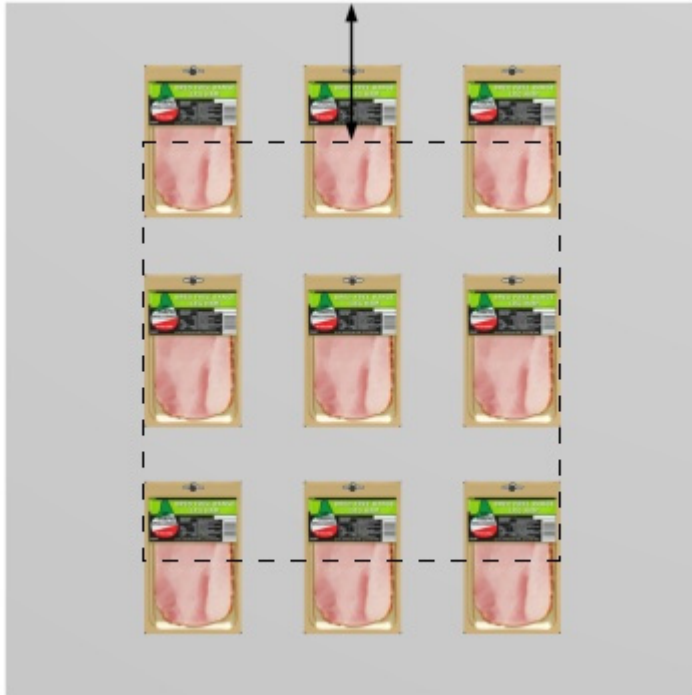
Top margin (Selected back panels)

The distance from the bottom edge of the back panel beyond which products cannot be placed.

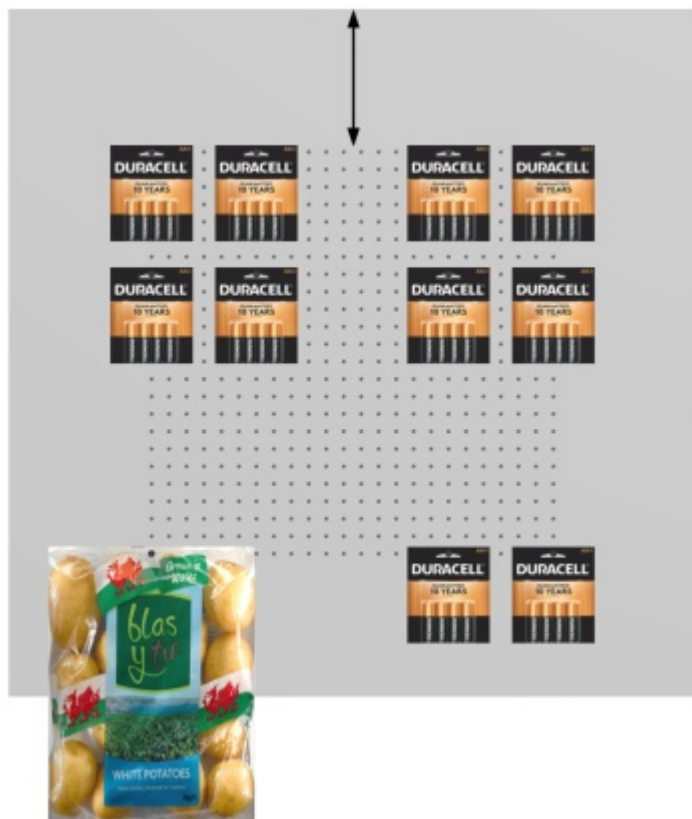
- Supported values: positive/negative numeric value [+/-0-9 and decimal point] (based on [Measurement unit](#))
- Default value: 0
- Example: -6

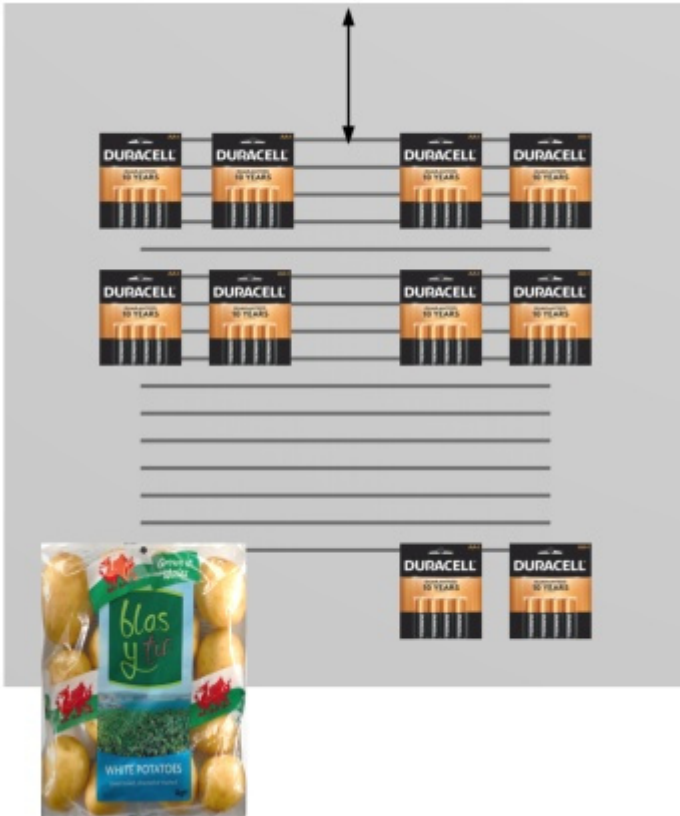
This margin has a different effect depending on [Back panel type](#):

- **Solid:** half of the product height is allowed to overflow the margin.



- **Pegboard, Slatwall:** the margin defines the upper limit of the area with peg holes or slats. Products can use all available peg holes or slat area.





Note: Negative values allow moving products and accessories completely above the back panel. (They must first be placed on the actual panel.)

Back panel type

The type of back panel.

- Supported values:
 - **Solid:** makes the back panel a plain surface. This means pegged products can be placed and moved freely on the back panel with no constraint.
 - **Pegboard:** turns the back panel into a pegboard. Pegged products will snap to the position of the peg holes on the back panel. By default, products are centered horizontally with the top edge aligned vertically to the peg hole. It is however possible to offset the product from the peg hole: [Lateral offset \(Item properties\)](#), [Vertical offset](#).
 - **Slatwall:** makes a panel with slats. Products snap to the slats vertically but are positioned freely horizontally.
- Default value: **Solid**



Example of Pegboard



Example of Slatwall

View holes / slats

Only available for [Back panel type](#): Pegboard, Slatwall

Toggles the visibility of the peg holes or slats on the back panel.

- Supported values:
 - *Checked*: peg holes and slats are visible.
 - *Not checked*: peg holes and slats define snapping positions but are invisible.
- Default value: *Not checked*

Note: [Display the bay front image](#) must be not checked to see the holes / slats.

Horizontal step

Only available for [Back panel type](#): Pegboard

The horizontal distance between holes on the pegboard. It acts as a snap grid increment to place pegged products.

- Supported values: positive numeric value [0-9 and decimal point] (based on [Measurement unit](#))
- Default value: 2.54 cm (or equivalent)
- Example: 2

Vertical step

Only available for [Back panel type](#): Pegboard, Slatwall

The vertical distance between holes or slats on the back panel. It determines the snap grid increment to hang products.

- Supported values: positive numeric value [0-9 and decimal point] (based on [Measurement unit](#))
- Default value: 2.54 cm (or equivalent)
- Example: 6

Hook length (Selected back panels)

The distance from the back panel to the tip of pegs. The specified length is then used to determine how many times each [pegged](#) product is repeated in depth on the hooks.

- Supported values: positive numeric value [0-9 and decimal point]
- Default value: 4 cm (or equivalent according to [Measurement unit](#))
- Example: 2.5

Notes:

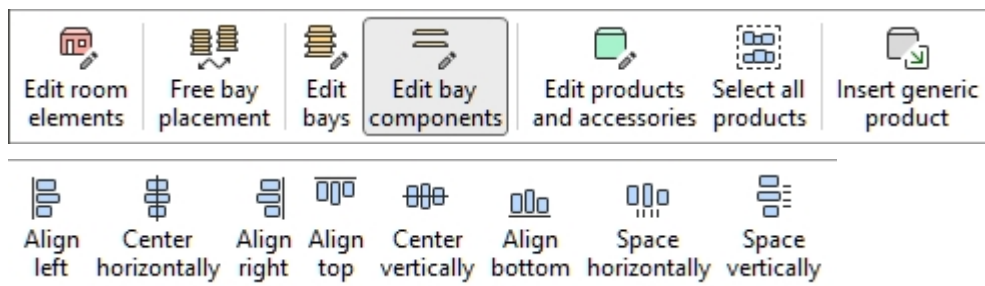
You don't need to type the actual measurement unit (e.g., *cm*), only the value.

Each actual hook is created and displayed automatically when you place a product on the back panel.

The hooks can also be hidden if you prefer ([View peg hooks](#)).

Tools and commands (Modify bays)

The object editing toolbar contains several tools and commands to work with shelving in your planogram.



Some additional commands that also apply to most objects can be found in another toolbar described in [General edit commands](#):

- [Undo \(Edit\)](#)
- [Redo \(Edit\)](#)
- [Delete \(Edit\)](#)

All the tools and commands to work with shelving are also available in [Main Menu](#) > **Edit**:

Undo	Ctrl+Z	
Redo	Ctrl+Y	
<hr/>		
Cut	Ctrl+X	
Copy	Ctrl+C	
Paste	Ctrl+V	
Delete	Delete	
<hr/>		
Edit room elements	R	
<hr/>		
Free bay placement		
<hr/>		
Edit bays	B	
Edit bay components	S	
<hr/>		
Edit products and accessories	I	
Select all products	Ctrl+A	
Align and space	>	
Rotate products	>	
Insert generic product	N	
Fit width to bay		

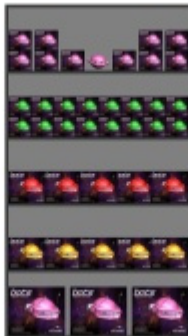
Align left	Ctrl+L
Center horizontally	Ctrl+E
Align right	Ctrl+R
Align top	Ctrl+T
Center vertically	Ctrl+M
Align bottom	Ctrl+B
Space horizontally	
Space vertically	
<hr/>	
Pack left on shelf	
Pack center on shelf	
Pack right on shelf	
Fill shelf width	
Mirror on shelf	

The tools and commands which are specific to **Modify bays** are described below.

Free bay placement

Specifies whether bays can be positioned and oriented freely in the current project.

- Supported values:
 - Pressed (checked)*: bays can be positioned and oriented freely. This mode is well suited for planograms that represent a retail area with non adjacent bays, several aisles, a shop-in-shop or simply multi-sided fixtures.
 - Not pressed (not checked)*: bays cannot be positioned freely. In this mode, they are automatically placed side-by-side adjacent and parallel to each other. You can still move the bays to rearrange their order from left to right. This mode is well suited for planogram projects that represent a single store aisle.
- Default value: *Not pressed (not checked)*



Example with Free bay placement checkmarked



Example with Free bay placement not checkmarked

Warning: Unchecking **Free bay placement** in a project that contains freely positioned bays will reposition all bays to be aligned and adjacent to each other. If you accidentally do this, you can recover the changes with [Undo \(Edit\)](#).

Notes:

- The selected value for **Free bay placement** is saved with the current project.
- If your current project has **Free bay placement not checkmarked** and you merge ([Insert \(project\)](#)) a project that has **Free bay placement checkmarked**, **Free bay placement** will automatically be *checkmarked* for the current project to allow positioning the added bays correctly.

Tips:

- Create the actual retail space architectural components in [Room](#).
- Use [Walk](#) to simulate walking in the retail area.

Edit bays

This tool lets you select whole bays to perform various operations such as editing their properties, moving and copying them.



- Keyboard shortcut: **B**

Notes:

- Switching to the task named [Modify bays](#) automatically activates this tool.
- The keyboard shortcut and the menu command activate this tool, but they don't activate the task: [Modify bays](#).

Select (Edit bays)

Bays can be selected and manipulated as whole entities.

1. Click on **Edit bays** in the toolbar or in the **main menu** > **Edit**.



2. Select bays:
 - To select one bay, **click** on it in the visualization area.
 - To select multiple bays:
 - i. hold the **Ctrl** key and **click** on them.
 - ii. or **draw a rectangle** with your mouse pointer across the desired bays.
3. Selected bays become highlighted in blue. You can then perform several tasks such as deleting, moving, changing dimensions, etc. You can also change common parameters on all parts of the selected bays. For example, assign one color to all components without having to select each component separately.
4. To deselect bays, click on empty zone of visualization area.

Move (Edit bays)

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

1. Click on **Edit bays** in the toolbar or in the **main menu > Edit**.



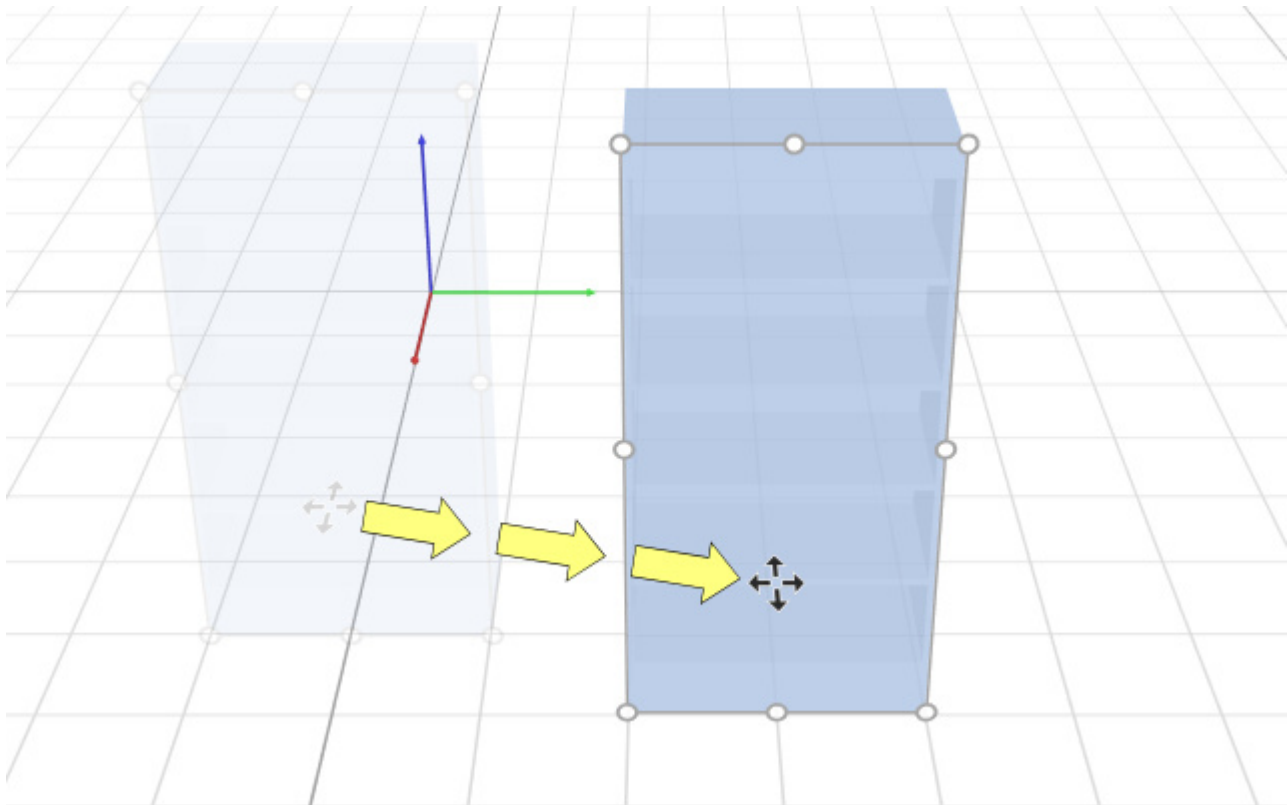
2. Select the bays to move. They become highlighted and a move pointer is displayed.
3. **Press and hold the mouse** button with the pointer over a selected bay and drag the mouse to the desired new position.
4. **Release the mouse** button.

The way the bays are moved depends on the state of **Free bay placement**:

- With **Free bay placement** not checkmarked: the bays are moved laterally only and placed at the closest position available next to another bay or between two bays, pushing the others to make space.



- With **Free bay placement** checkmarked: the bays are moved in any direction and placed at the selected position on the ground. If there are other bays at this position, they may overlap.



Tips:

- With **View grid** not checkmarked, bays are moved to 1 cm (or 0.5") rounded position values.
- With **View grid** checkmarked, bays are snapped to the grid lines.
- To move bays completely freely, you can hold the space bar while moving, producing a slower motion and preventing position rounding.

Note: Dragging is convenient for quick mouse editing but you can also specify precise position values in the parameters of Selected bays:

- [Position Y \(Selected bays\)](#)
- [Position Z \(Selected bays\)](#)
- [Position X \(Selected bays\)](#)

Copy by moving (Edit bays)

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

1. Click on **Edit bays** in the toolbar or in the **main menu > Edit**.



2. Select the bays to move. They become highlighted and a move pointer is displayed.
3. **Press and hold the Ctrl key and the mouse** button with the pointer over a selected bay and drag the mouse to the desired new position.
4. **Release the mouse** button.

The way the bays are copied depends on the state of [Free bay placement](#):

- With Free bay placement not checkmarked: the bays are copied laterally only and placed at the closest position available next to another bay or between two bays, pushing the others to make space.
- With Free bay placement checkmarked: the bays are copied in any direction and placed at the selected position on the ground. If there are other bays at this position, they may overlap.

Tips:

- With [View grid](#) not checkmarked, copied bays are placed at 1 cm (or 0.5") rounded position values.
- With [View grid](#) checkmarked, bays are snapped to the grid lines.
- To copy bays completely freely, you can hold the space bar while dragging, producing a slower motion and preventing position rounding.

Note: Copying bays with your mouse is convenient for quickly duplicating bays. You can later reposition them precisely with the parameters of Selected bays:

- [Position Y \(Selected bays\)](#)
- [Position Z \(Selected bays\)](#)
- [Position X \(Selected bays\)](#)

Resize (Edit bays)

Bays can be resized with the mouse.

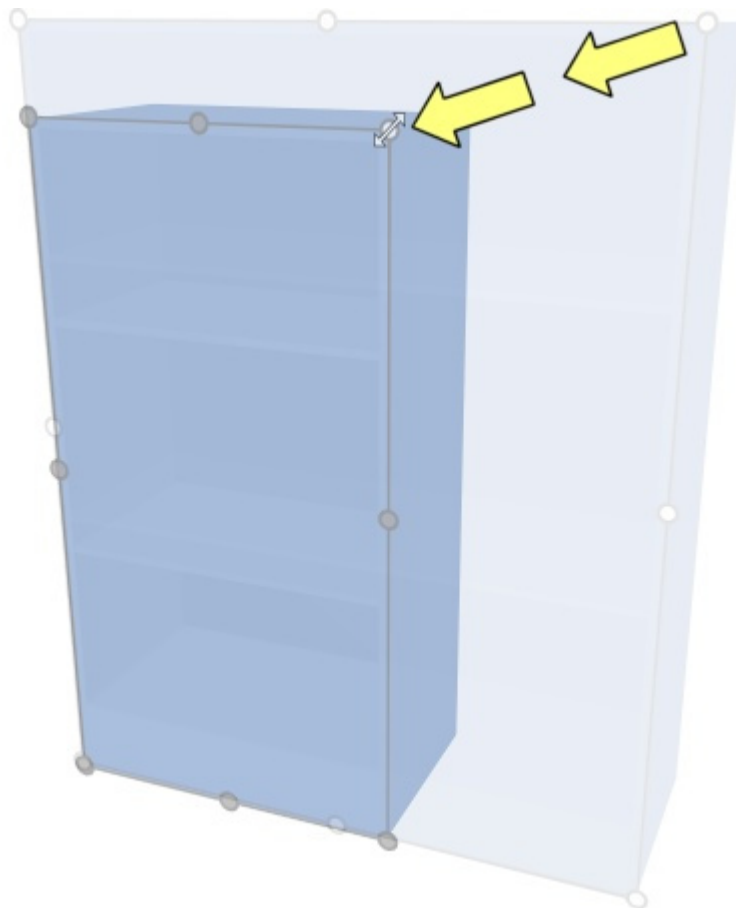
1. Click on **Edit bays** in the toolbar or in the **main menu** > **Edit**.



2. Select the bays to move. They become highlighted with round handles along the front-most surfaces. If the round handles do not appear on the side to resize, use [Orbit](#) to make the desired surfaces surface face the screen.



3. **Grab a handle with the mouse button and drag** it until your bays reach the desired size. The corner handles let you resize in two directions, while the handles at the middle of edges let you constrain resizing to one direction.

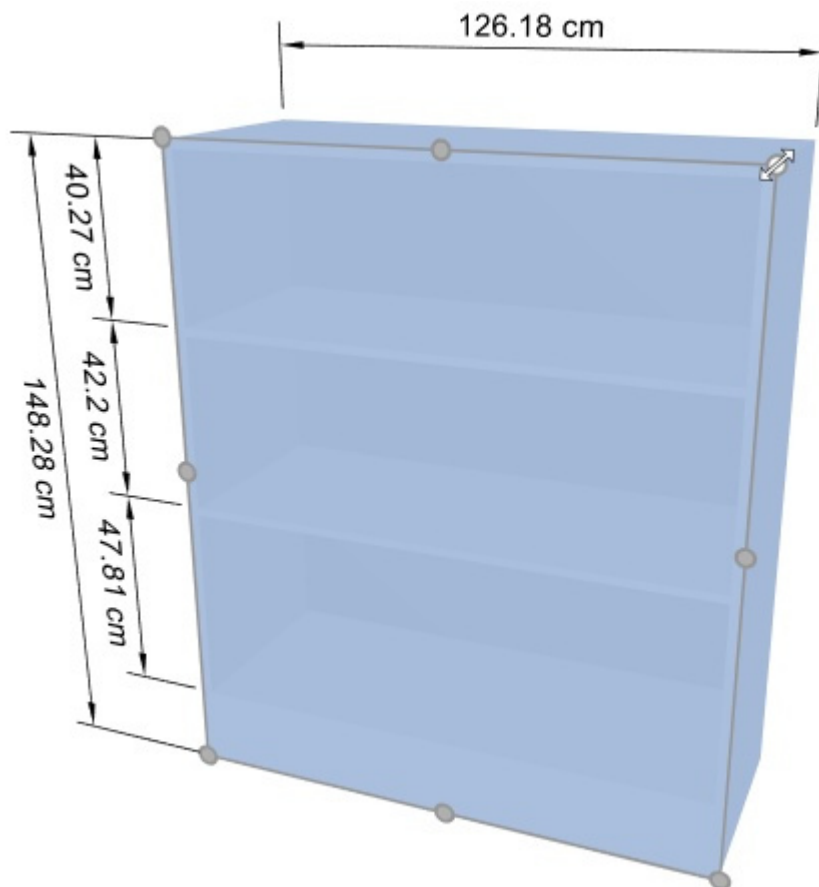


4. **Release the mouse button.** The bays are resized. Note that shelf and panel spacing is automatically recalculated while maintaining the thickness of such components.

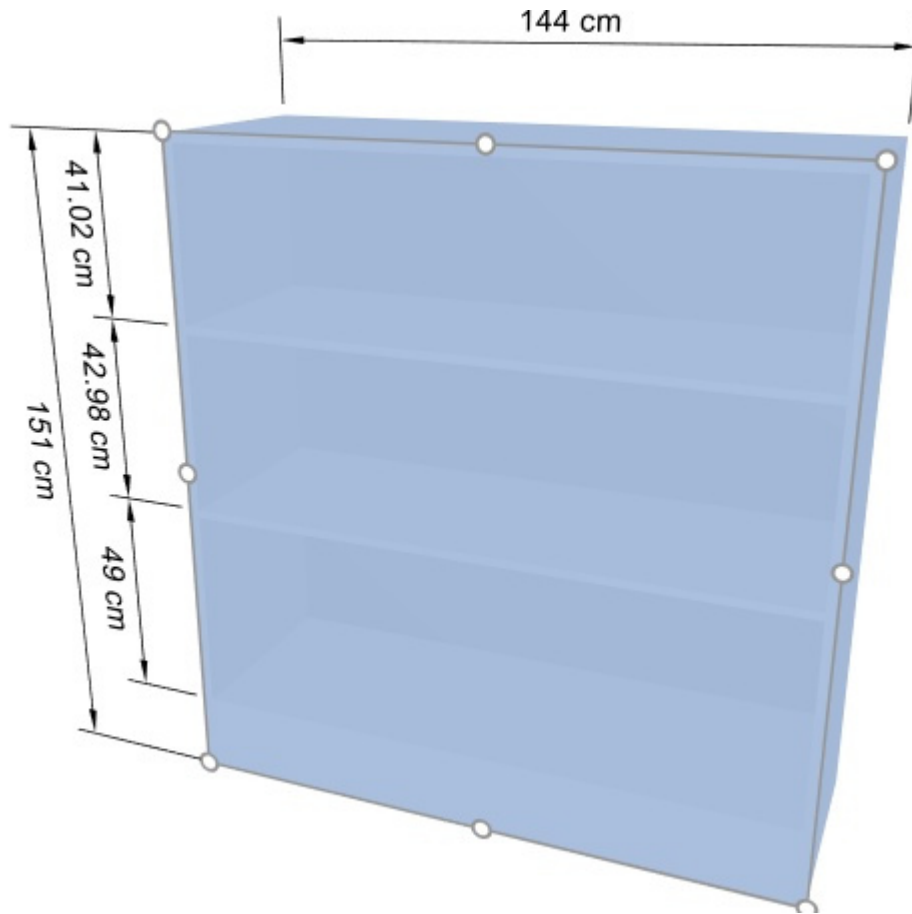
Notes:

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

Tip: With [View dimensions](#) checkmarked, you can display the dimensions of the resizing rectangle while resizing. This is useful if you know in advance the space to allocate to the bays:



Tip: With [View dimensions](#) checkmarked, you can also display the actual exact dimensions used by all bays:



Note: Handles are convenient for quick mouse resizing, but you can also specify precise dimension values in the parameters of Selected bays:

- Overall width (Selected bays)
- Overall height (Selected bays)
- Overall depth (Selected bays)

Rotate bays

If **is activated**, you can rotate bays with your mouse around the vertical axis:

1. Click on **Rotate bays** in the **main menu** > **Edit**, or the corresponding button on the object editing toolbar.
2. **Select** the bays to rotate. They become highlighted in blue.
3. **Press** the mouse button and **drag** your mouse to the left or right to rotate the bays.
4. **Release** the mouse button when the bays have the desired orientation.

Notes:

- The rotation center is located at the center of the selected bays and is indicated by an axis tripod.
- With the **View grid** not checkmarked, bays are rotated to 5-degree rounded values.
- With **View grid** checkmarked, bays are rotated to 90-degree rounded values.
- To rotate the bays completely freely, you can hold the space bar while rotating, producing a slower motion and preventing orientation rounding.

Tip: Handles are convenient for quick mouse editing but you can also specify precise orientation values in the parameters of Selected bays: [Orientation](#).

Edit bay components

This tool lets you select **bay components** (individual part of the bays) to perform various operations such as editing their properties, moving and copying them.



- Keyboard shortcut: **S**

Select (Edit bay components)

You can select each bay component separately and perform various operations such as editing the components and their properties or moving and copying components.

1. Click on **Edit bay components** in the toolbar or in the **main menu** > **Edit**.



2. **Select** bay components:
 - To select one component, **click** on it in the visualization area.
 - To select multiple components:
 - hold the **Ctrl** key and **click** on them.
 - or **draw a rectangle** with your mouse pointer across the desired components.
3. Selected components become highlighted in blue. You can then perform several tasks such as deleting, moving, changing dimensions, etc. You can also change common parameters for selected components (consult the list of parameters in [Selected bay components](#)). For example, assign one color to several components.

To deselect bay components, click on an empty zone of the visualization area.

Note: you can select multiple components each belonging to different bays.

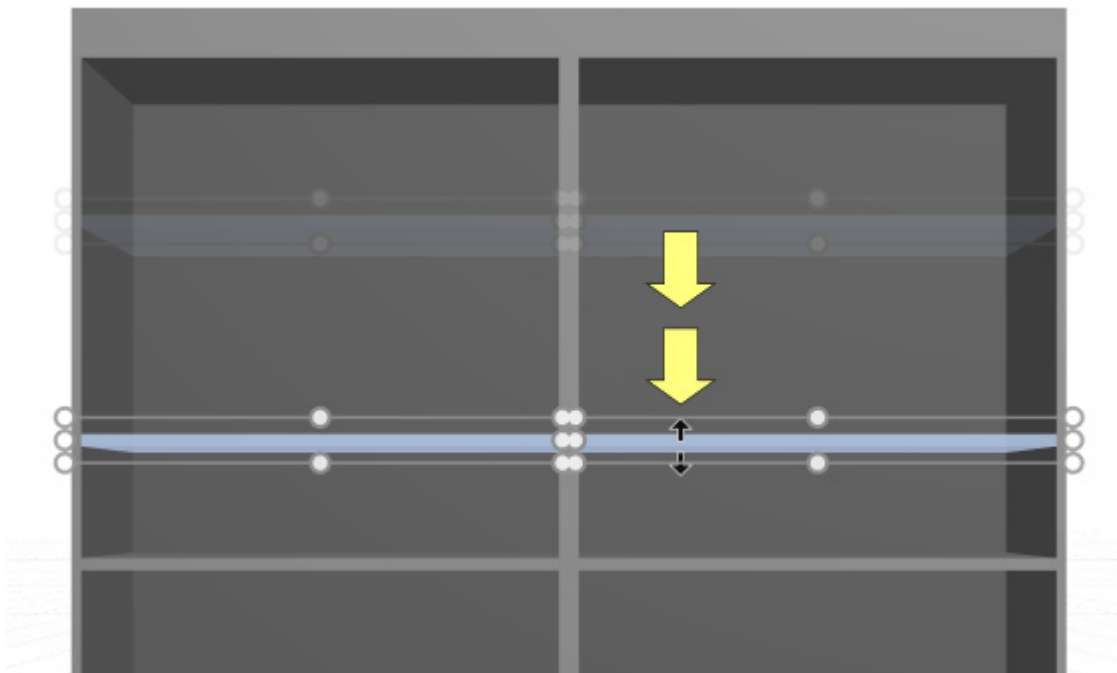
Move (Edit bay components)

You can move selected bay components laterally or vertically with your mouse:

1. Click on **Edit bay components** in the toolbar or in the **main menu** > **Edit**.



2. **Select** bay components to move. They become highlighted and a move pointer is displayed.
3. **Press and hold the mouse** button and move the mouse to the desired position. The displacement is constrained either vertically or laterally depending on your pointer motion.
4. **Release the mouse** button when you are happy with the new position.



Notes:

- Bay components are normally moved to 1 cm or 0.5" rounded position values. For example, if you move a shelf up from an original distance from the ground of 141.2 cm, it will be repositioned at a rounded new distance from the ground (e.g., 163.0 cm).
- To move a component completely freely, you can hold the space bar while moving, producing a slower motion and preventing position rounding.
- When moving shelves, [Collisions \(Settings\)](#) are automatically temporarily de-activated to allow crossing other shelves even if there are products.

Tip: Dragging is convenient for quick mouse editing but you can also specify precise position values in the parameters of [Selected bay components](#):

- [Lateral offset \(Selected bay components\)](#)
- [Distance to bottom](#)
- [Distance to back](#)

Copy (Edit bay components)

You can copy selected bay components with the mouse.

1. Click on **Edit bay components** in the toolbar or in the **main menu** > **Edit**.



2. **Select** bay components to copy. They become highlighted and a move pointer is displayed.
3. **Press the mouse button** while holding the **Ctrl** key and **drag** the pointer to the desired position.

Tip: Copying bay components with your mouse is convenient for quickly duplicating shelves or other panels. You can later reposition them precisely with the parameters of [Selected bay components](#):

- [Lateral offset \(Selected bay components\)](#)
- [Distance to bottom](#)

- [Distance to back](#)

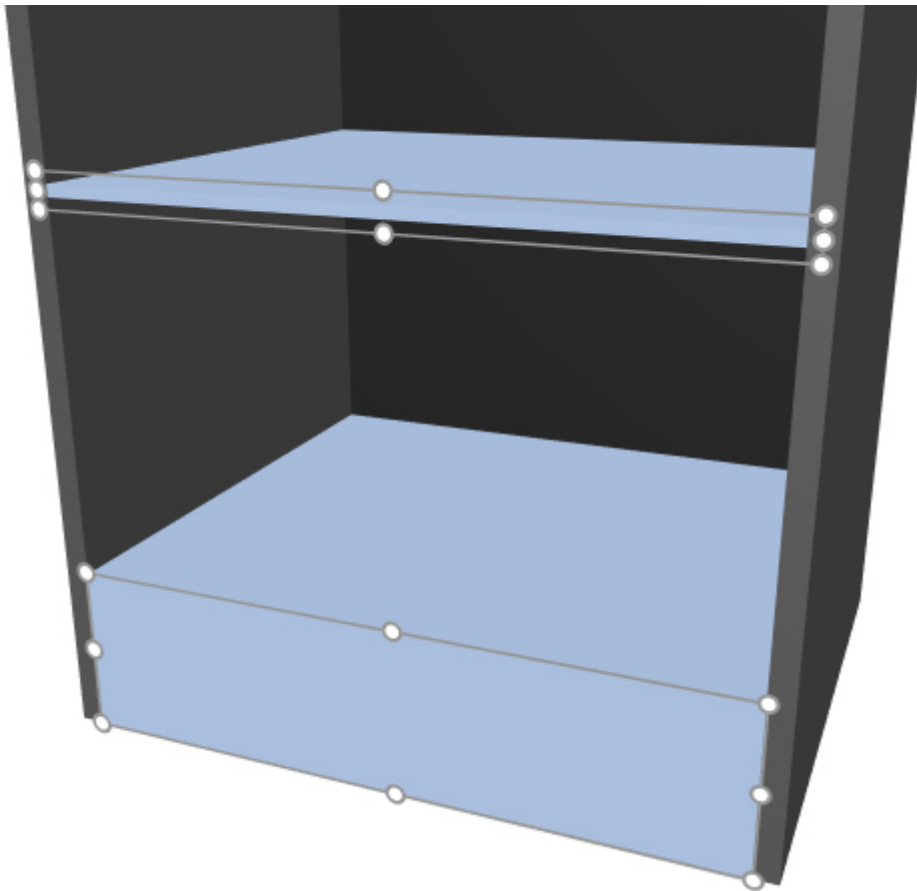
Resize (Edit bay components)

You can resize bay components with the mouse.

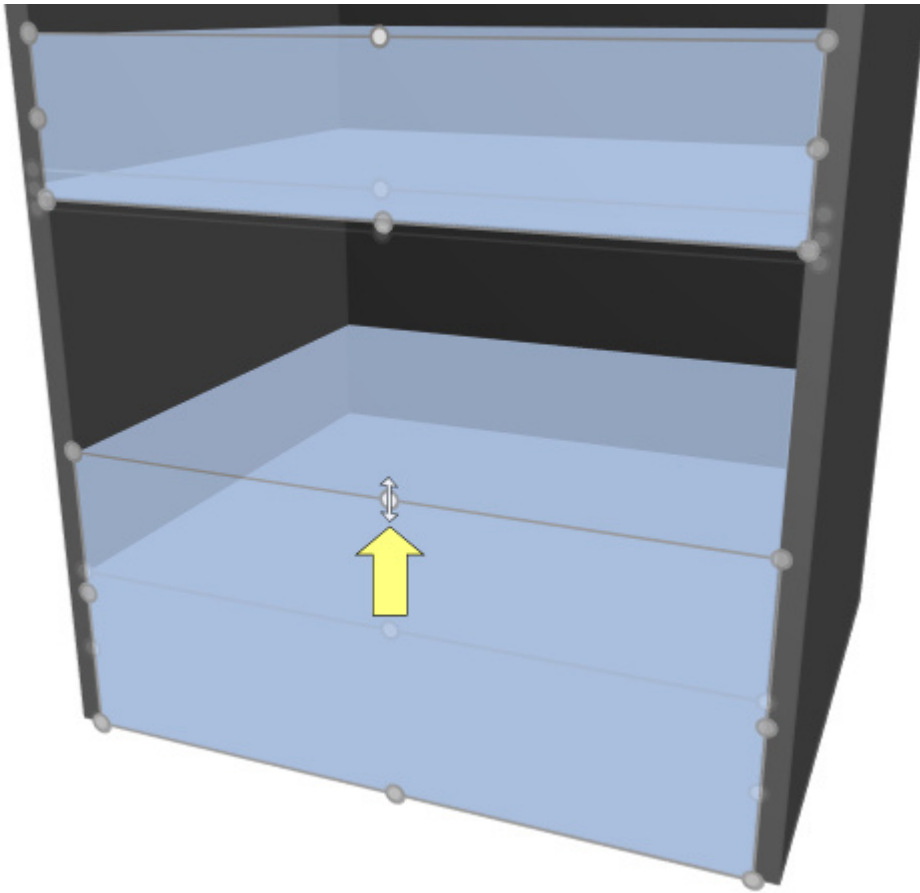
1. Click on **Edit bay components** in the toolbar or in the **main menu > Edit**.



2. **Select** bay components to copy. They become highlighted with round handles along the front-most surfaces. If the round handles do not appear on the selected components, use [Zoom](#) to enlarge them on screen. If the round handles do not appear on the side to resize, use [Orbit](#) to make the desired surfaces surface face the screen.



3. Grab one of the handles with the mouse button and drag it until your components reach the desired size. The corner handles let you resize in two directions, while the handles at midpoint along edges let you constrain resizing to one direction.

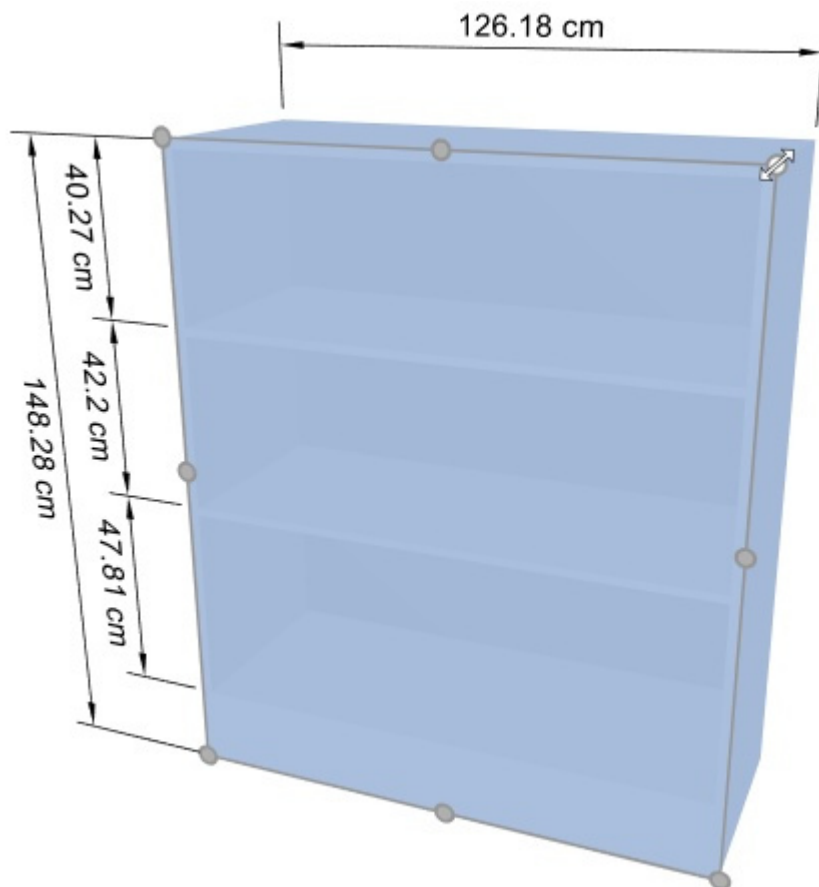


4. Release the mouse button.

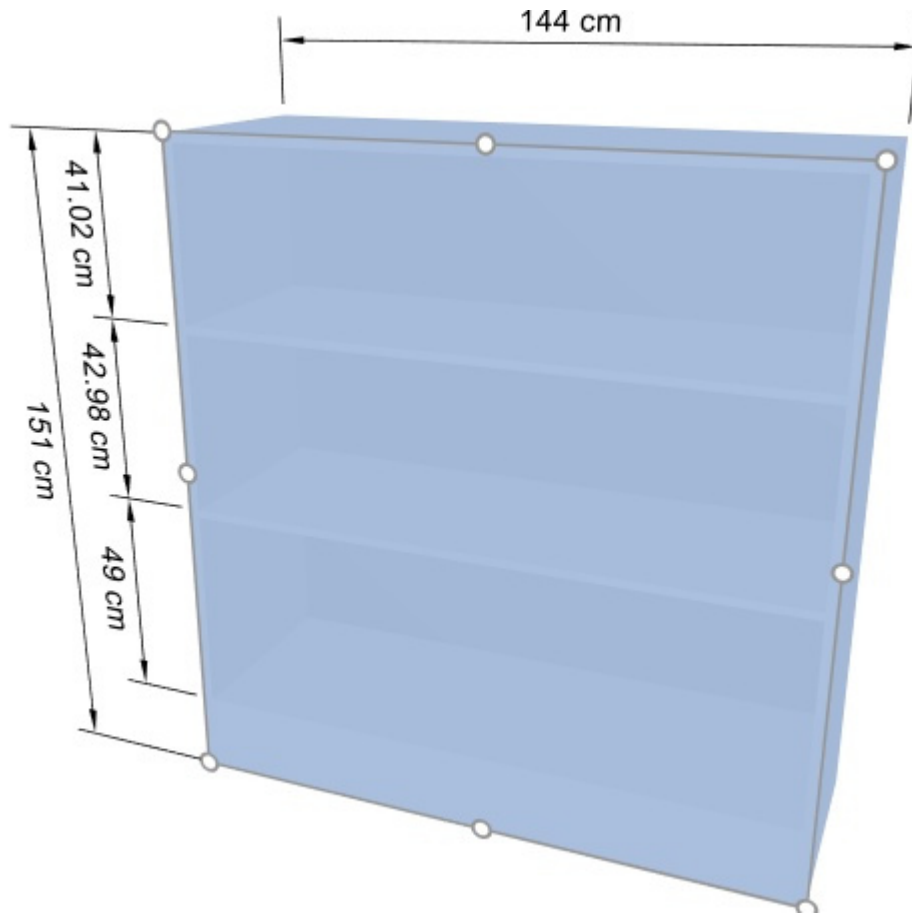
Notes:

- Bay components are normally resized to 1 cm or 0.5" rounded position values.
- To resize a component completely freely, you can hold the space bar while moving, producing a slower motion and preventing dimension rounding.

Tip: With [View dimensions](#) checkmarked, you can display the dimensions of the resizing rectangle while resizing. This is useful if you know in advance the space to allocate to the bay components:



Tip: With [View dimensions](#) checkmarked, you can also display the actual exact dimensions used by all bay components:



Note: Handles are convenient for quick mouse resizing, but you can also specify precise dimension values in the parameters of [Selected bay components](#):

- [Width \(Selected bay components\)](#)
- [Height \(Selected bay components\)](#)
- [Depth \(Selected bay components\)](#)

Align and space (Selected bay components)

You can apply various spacing and alignment presets to a group of selected bay components. For example, you can select multiple shelves and space them all evenly vertically.

Instructions:

1. Click on **Edit bay components** on the toolbar or in **Main Menu > Edit**.



2. Select the desired bay components. They become highlighted and a move pointer is displayed.
3. Click on one of the align commands on the object editing toolbar or in **Main Menu > Edit > Align and space**.
4. Selected bay components are aligned accordingly as described below.

Align left (Selected bay components)

Align the selected objects horizontally to their leftmost edge.

- Keyboard shortcut: **Ctrl + L**

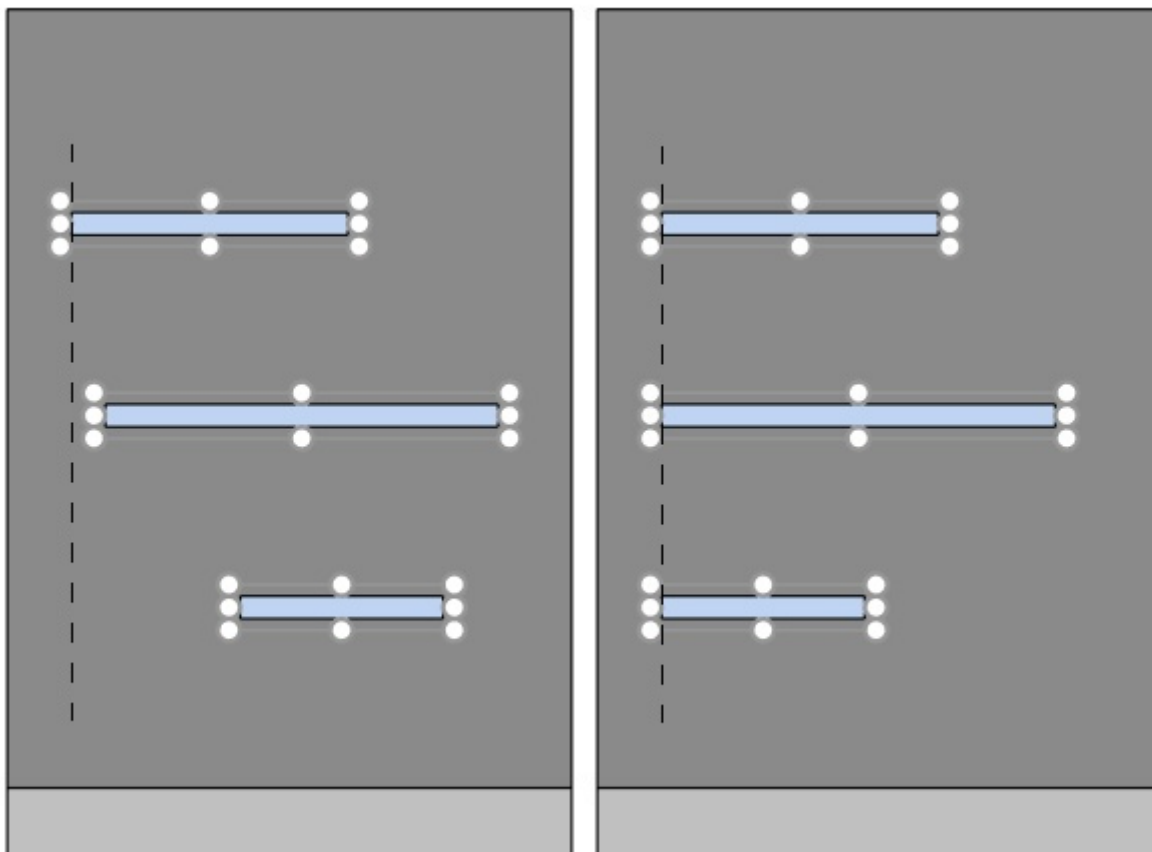


Image on the left: Before alignment

Image on the right: Align left (Selected bay components)

Center horizontally (Selected bay components)

Align the selected objects to their horizontal center.

- Keyboard shortcut: **Ctrl + E**

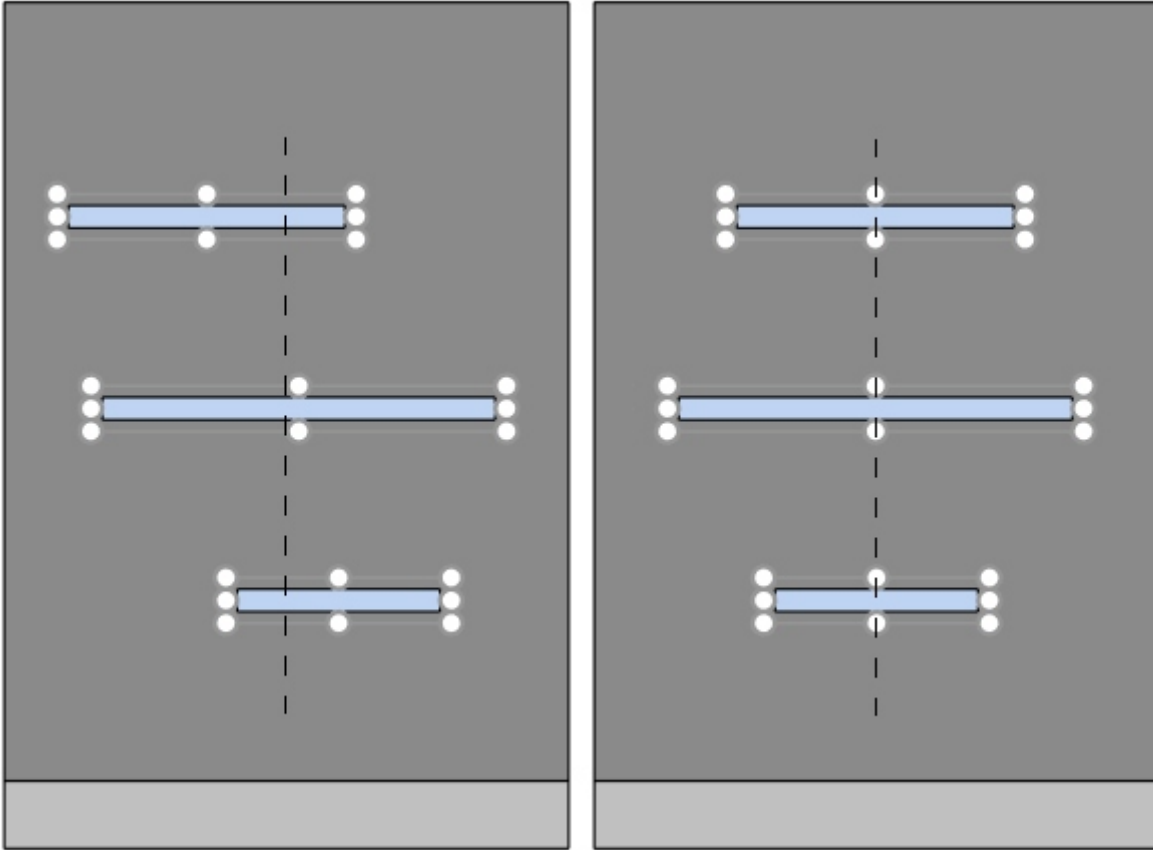


Image on the left: Before alignment

Image on the right: Center horizontally (Selected bay components)

Align right (Selected bay components)

Align the selected objects horizontally to their rightmost edge.

- Keyboard shortcut: **Ctrl + R**

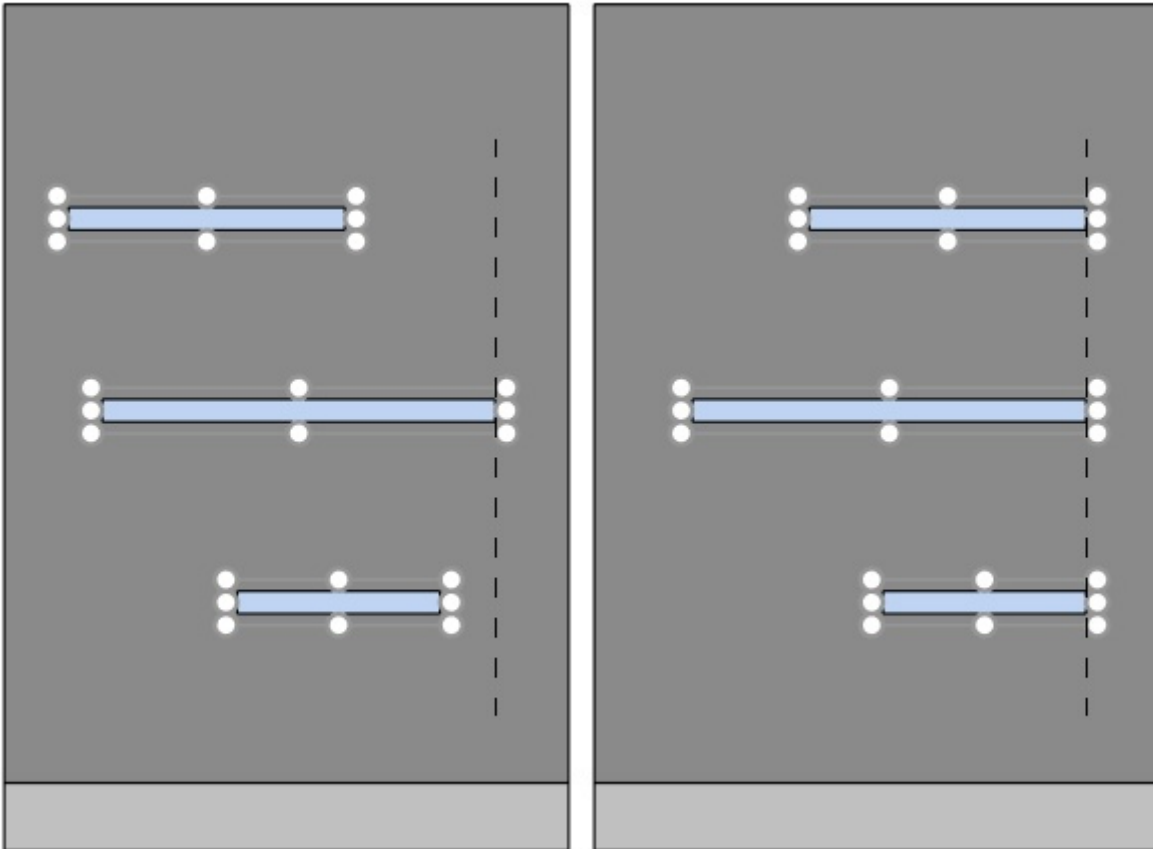


Image on the left: Before alignment

Image on the right: Align right (Selected bay components)

Align top (Selected bay components)

Align the selected objects vertically to their topmost edge.

- Keyboard shortcut: **Ctrl + T**

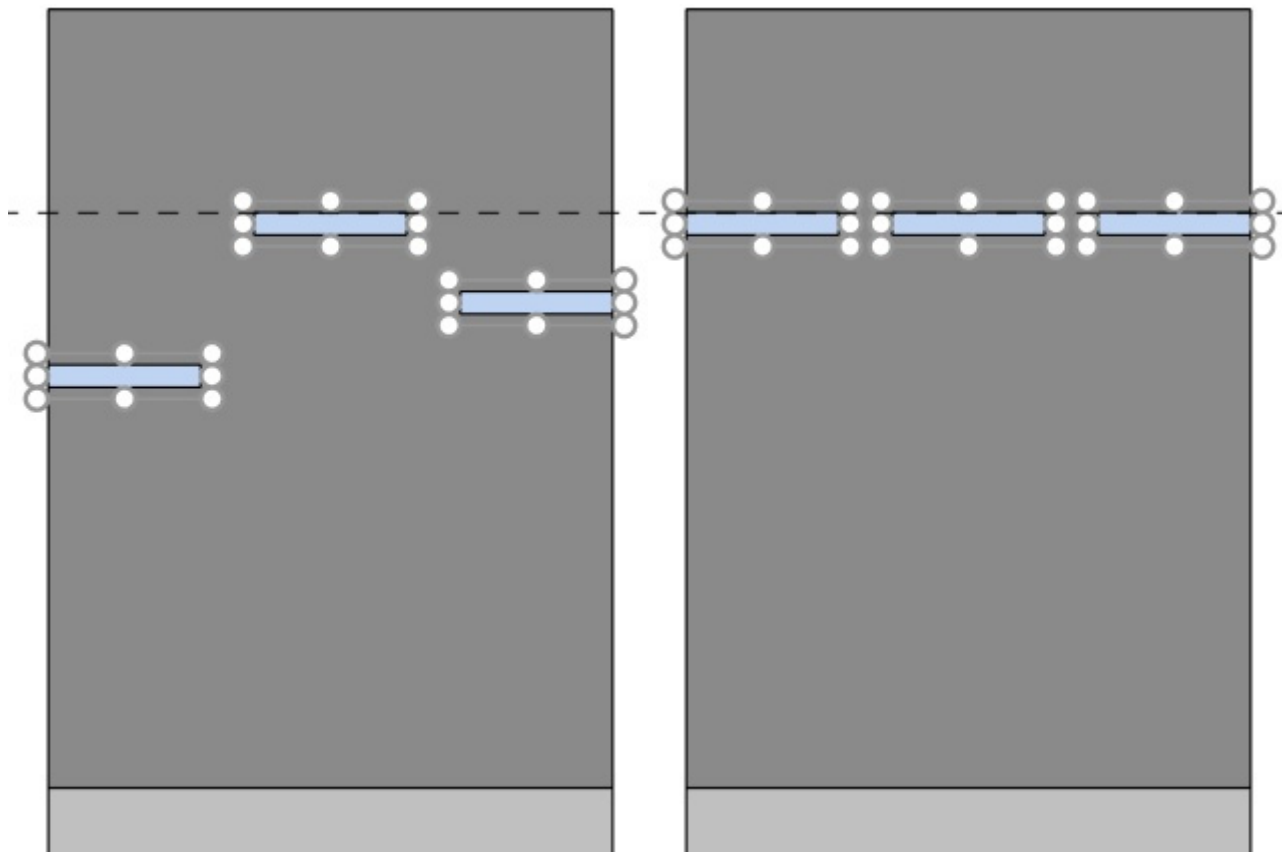


Image on the left: Before alignment

Image on the right: Align top (Selected bay components)

Center vertically (Selected bay components)

Align the selected objects to their vertical center.

- Keyboard shortcut: **Ctrl + M**

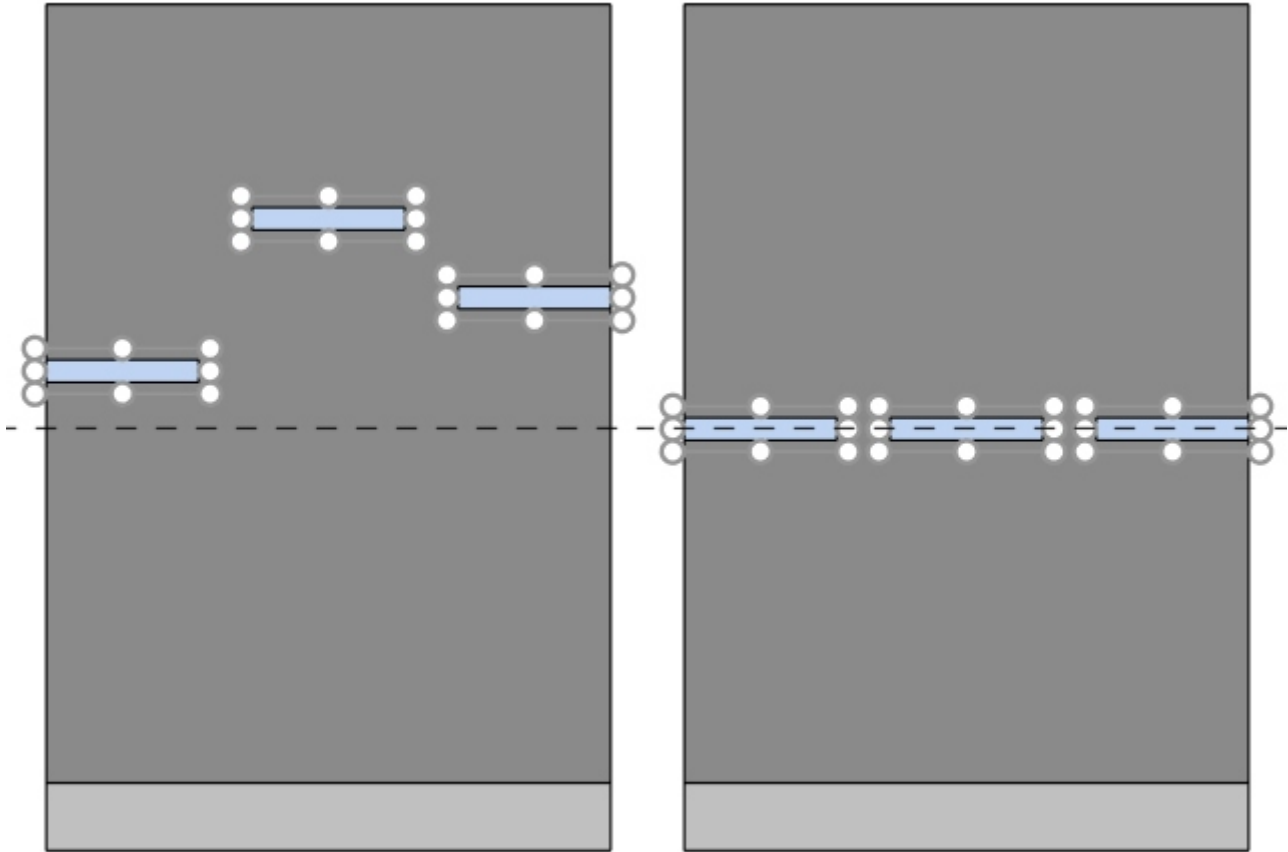


Image on the left: Before alignment

Image on the right: Center vertically (Selected bay components) Align top (Selected bay components)

Align bottom (Selected bay components)

Align the selected objects vertically to their lowest edge.

- Keyboard shortcut: **Ctrl + B**

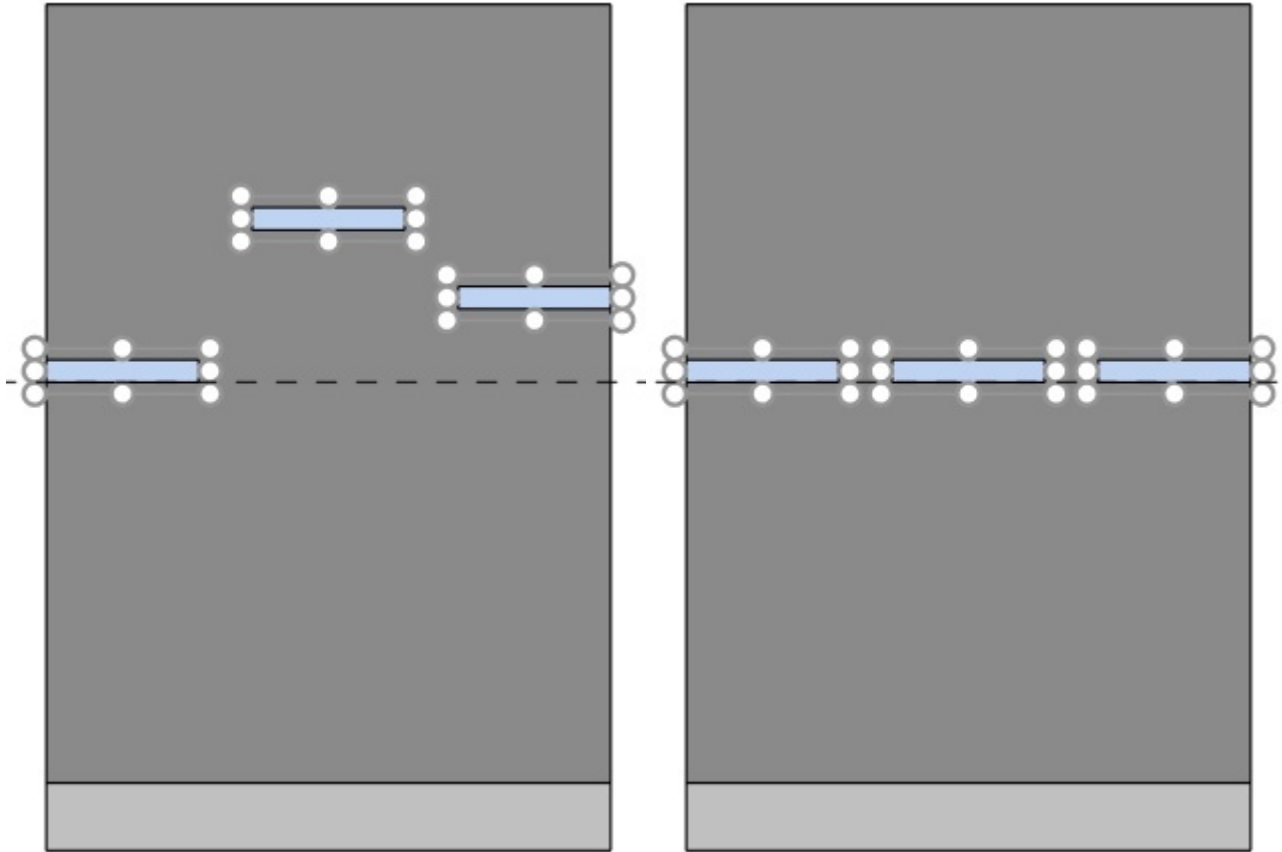


Image on the left: Before alignment

Image on the right: Align bottom (Selected bay components)

Space horizontally (Selected bay components)

Distribute the selected objects horizontally with an equal gap between them without changing the total space used.

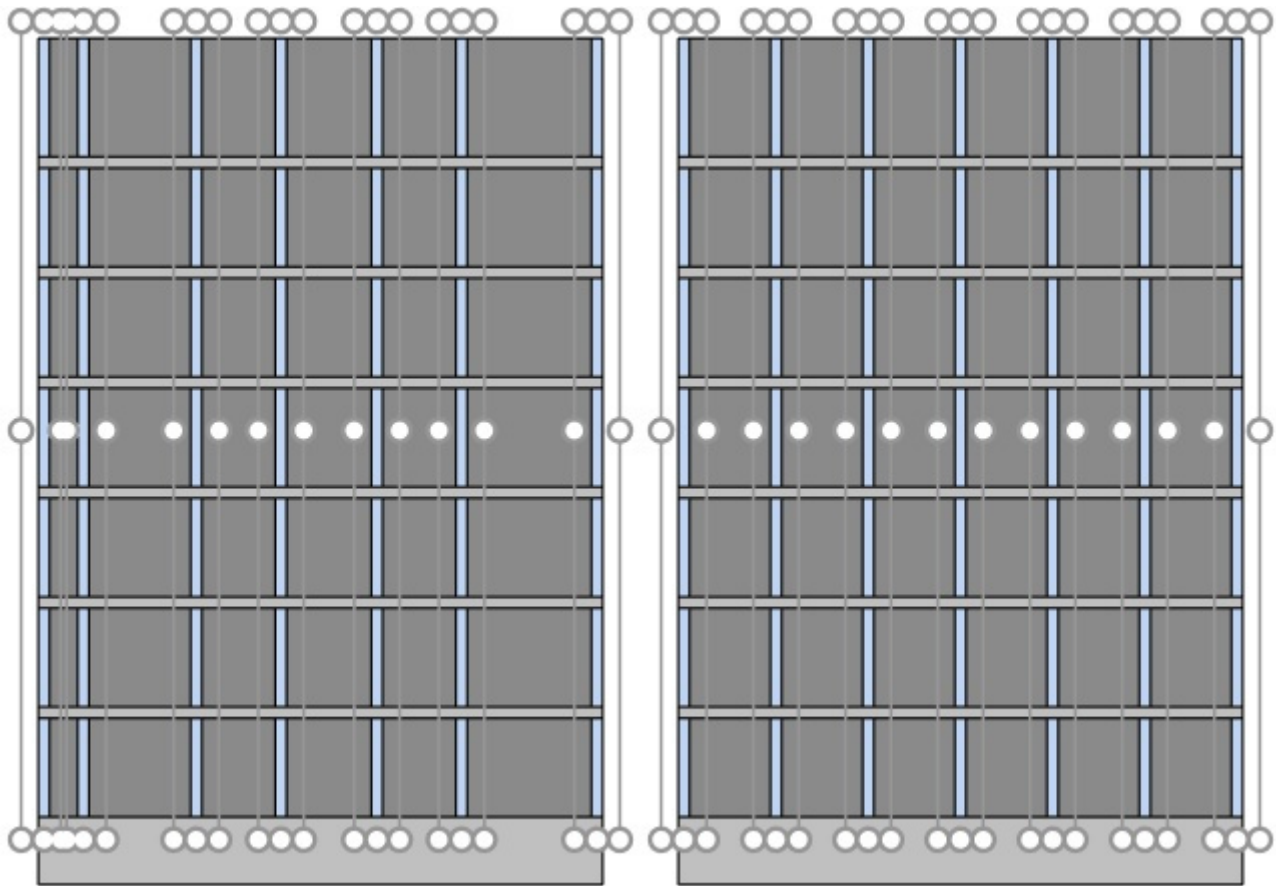


Image on the left: Before spacing

Image on the right: Space horizontally (Selected bay components)

Space vertically (Selected bay components)

Distribute the selected objects vertically with an equal gap between them without changing the total space used.

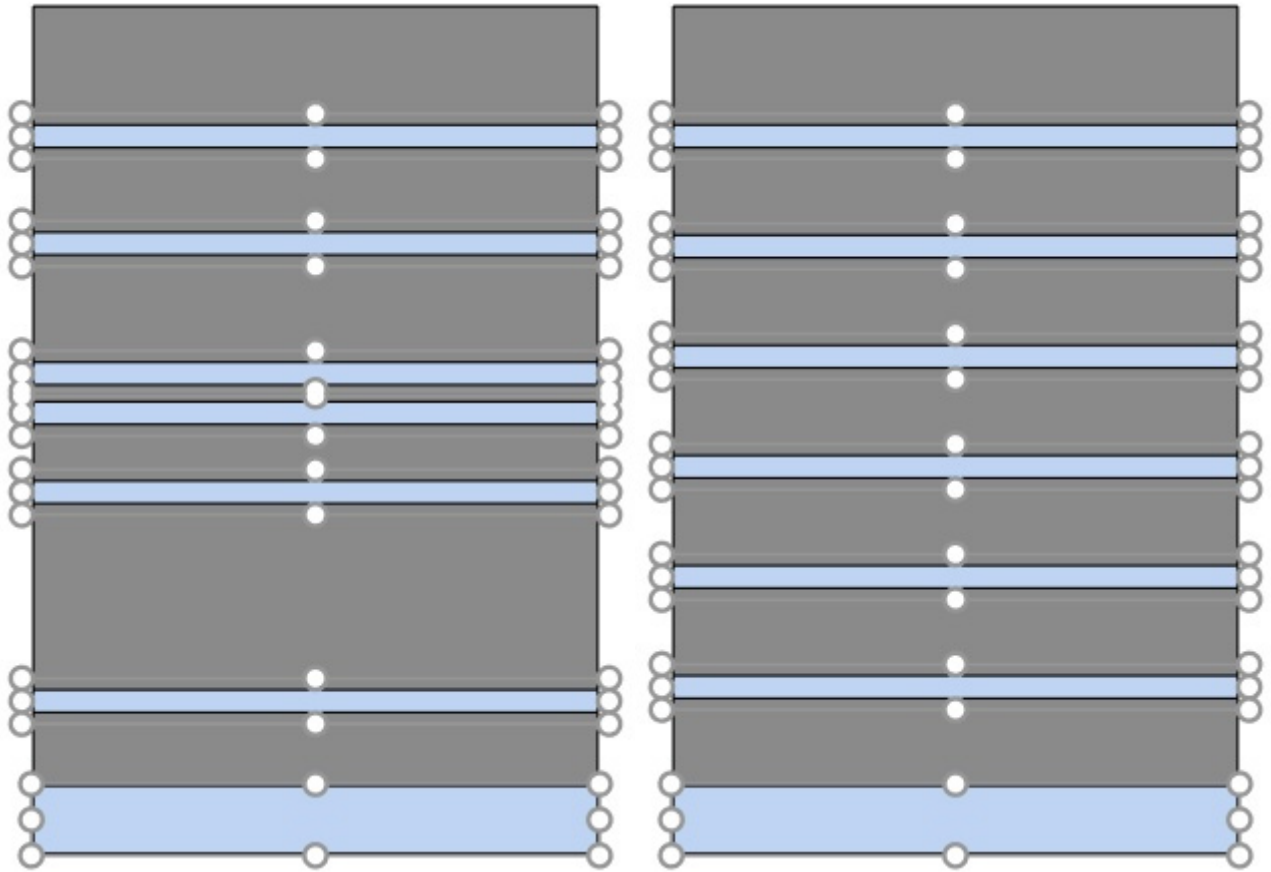
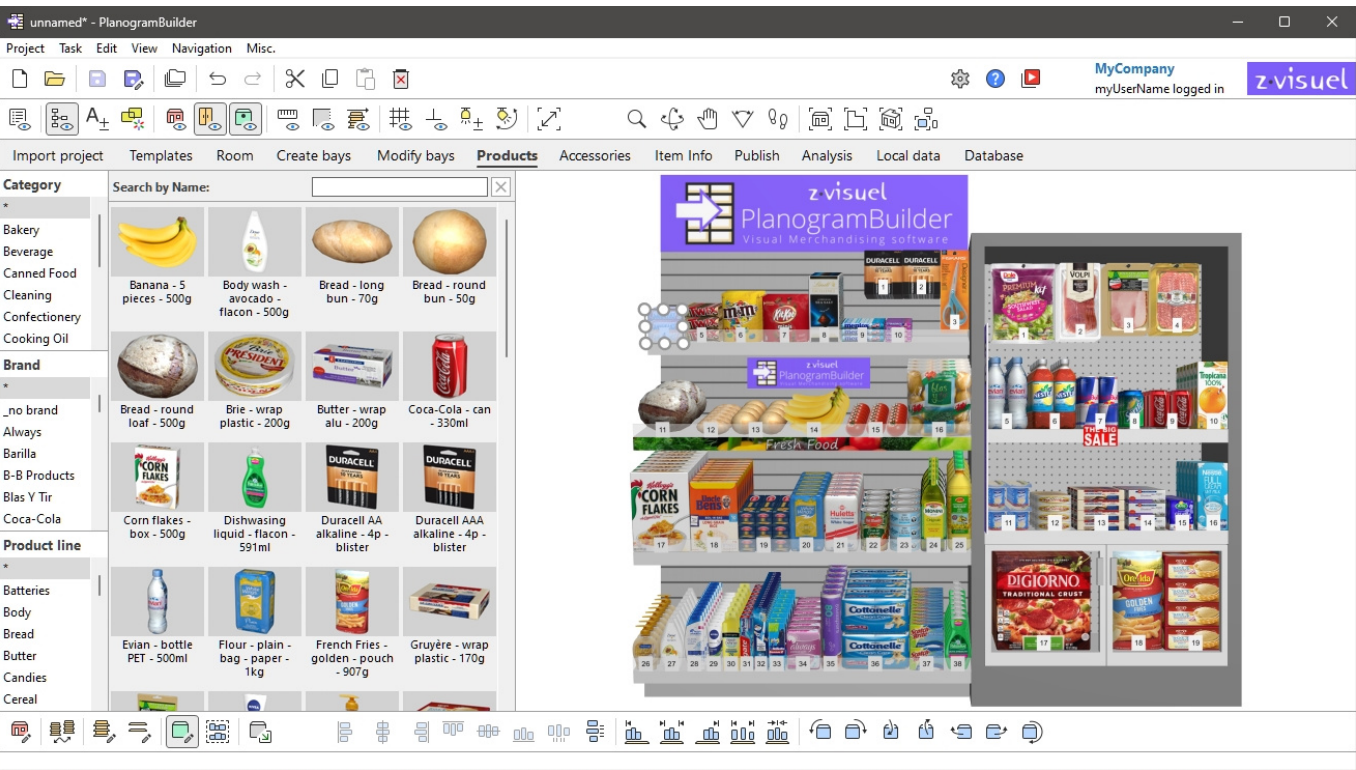


Image on the left: Before spacing

Image on the right: Space vertically (Selected bay components)

Products

This task lets you place products on shelving in planograms.



Note: If you are just starting using PlanogramBuilder, some sample items are available as examples. You must then add your own products to the database. Consult [Database](#) to find out how to add products to the database.

Tip: If you have room elements in your project, you may want to hide them while working with products, so the walls are not blocking the view of shelving. Consult [View the room](#).

Catalog of products

This pane reflects all the products you have in your database. This is where you can select and drag your products into your planograms.



Classification hierarchy (Catalog of products)

On the left side of the pane, your items are listed in a hierarchical menu with 3 levels, each level labelled as defined in [Item classification properties](#).

Each level displays the list of classification values assigned to your items:

- 1st level at the top ([A \[A: Classification - level 1\]](#))
- 2nd level in the middle ([B \[B: Classification - level 2\]](#))
- 3rd level at the bottom ([C \[C: Classification - level 3\]](#))

Clicking on the values in the hierarchy filters the items displayed in the catalog.

When you select an item in the 1st level of the hierarchy, only the items matching your choice are shown at the 2nd level, and so on for the 3rd level.

Note: items with empty values for a given level in the hierarchy are shown in the (undefined) group for this classification level.

Tip: You can display all items for any of the classification level by selecting the "*" symbol.

Tip: You can navigate in the classification list with the keyboard:

- Move up/down in the list content with the **Up/Down arrow** keys.
- Move down in the classification levels with the **Tab** key.

- Move up in the classification levels with the **Shift + Tab** keys.

Search by text (Catalog of products)

Just above the catalog thumbnails, a text box lets you type text to search and display matching items. When using this method to find items, the hierarchy is grayed out and PlanogramBuilder looks in your entire database to find items matching the text you entered.

Supported values and search rules:

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

Example: type *frozen CHOCOLATE* in the text box. It will display all the items containing *chocolate* AND *frozen* in their name.

By default, the search function searches by item name, but you can also set it to search by another property, such as Reference or a combination of properties (consult [Captions & Search](#)). Note that the label of Search by text (Catalog of products) is updated to match your selected search criteria.

To get back to the classification filter method, you can clear the search box with the **Clear** button.

Thumbnail list (Catalog of products)

The right side of the catalog pane displays the list of products corresponding to [Classification hierarchy \(Catalog of products\)](#) or to [Search by text \(Catalog of products\)](#).

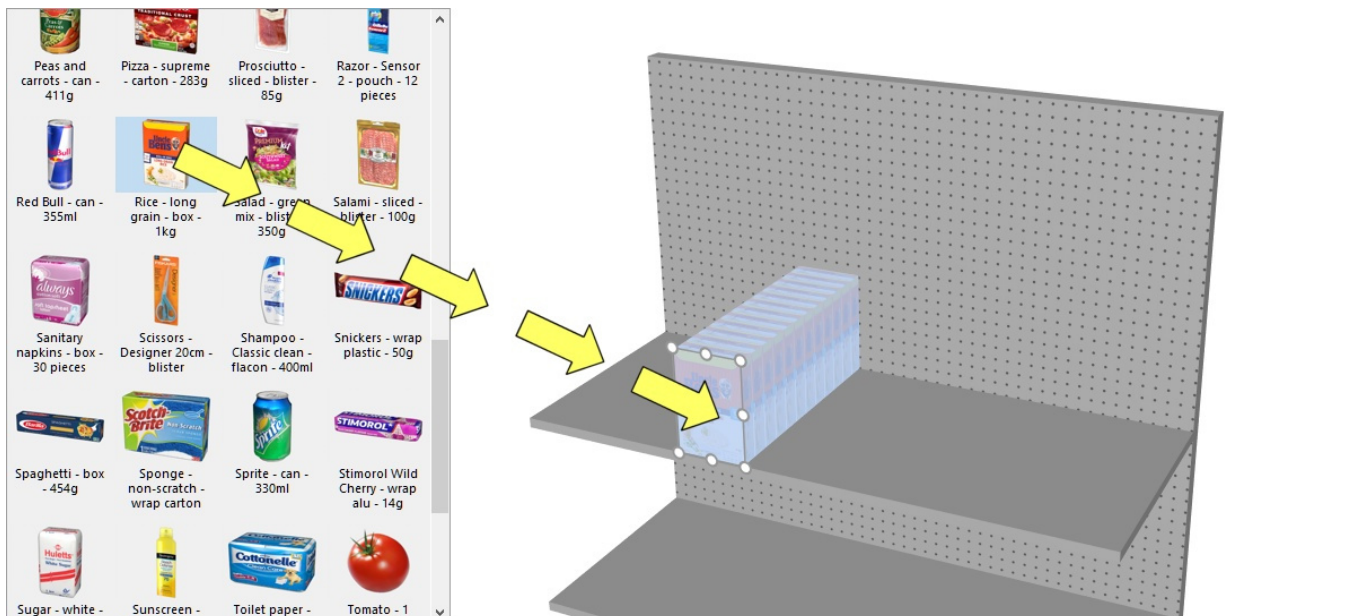
Each product is represented by a thumbnail and a text description.

By default, the thumbnail caption is the product name, but you can also set it to another property, such as Reference or a combination of properties (consult [Captions & Search](#)).

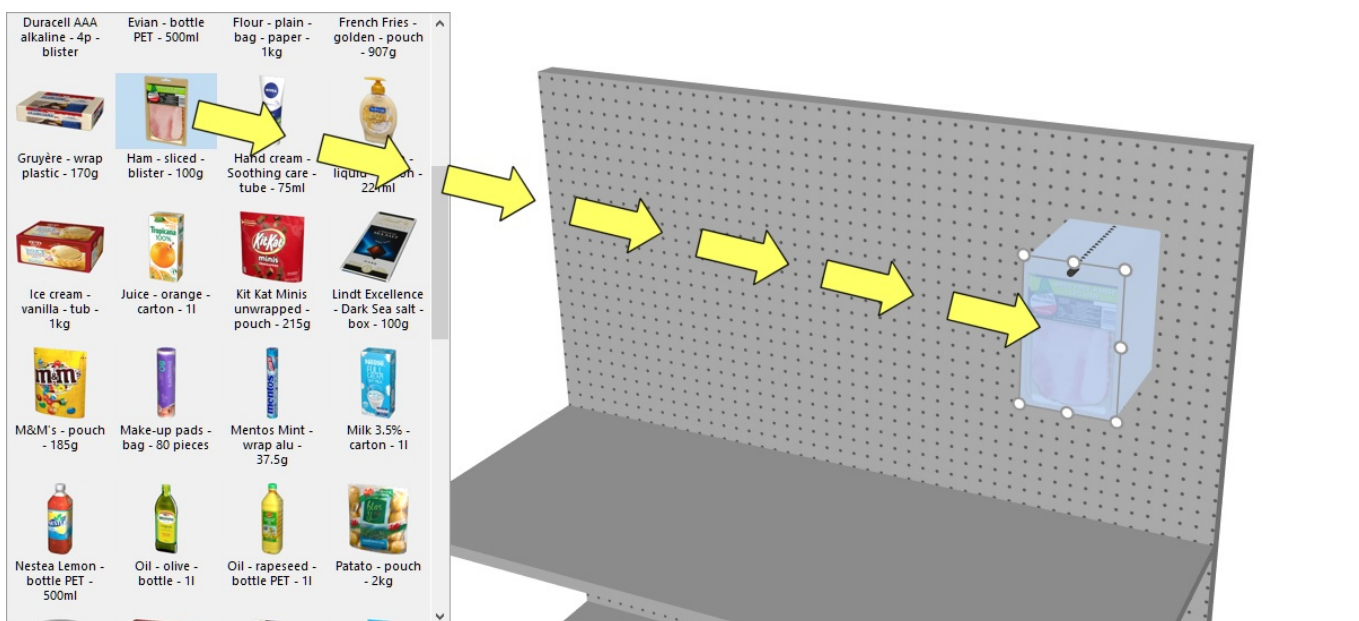
Adding products to a planogram

To place a product from the catalog into your current planogram:

1. Find the desired product in the catalog using the classification or the text filters.
2. **Hold the mouse button down** and **drag** the product to the desired location on the shelving:
 - Products with the following behaviors can normally be dragged onto Shelf: [standard](#), [stackable](#), [tester](#):

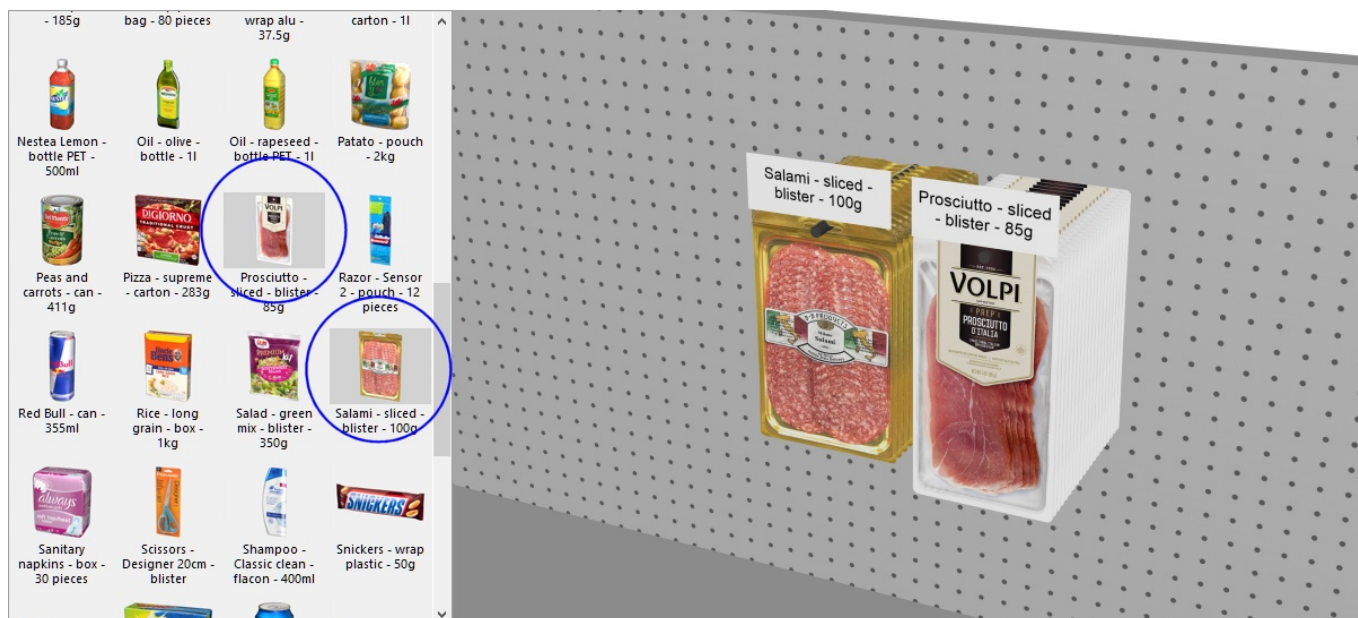


- Products with the following behaviors can normally be dragged onto Back panel: **pegged**:



- If you want to place a product designed for shelves on a peg, or vice-versa, hold the **Shift** key while dragging the product from the catalog to the shelving. The effect is as follows on the behavior of the dragged product:
 - **standard, stackable** or **tester** switches to **pegged**
 - **pegged** switches to **standard**
- If you want to add a product in a planogram without it being in your database, for example a placeholder for a competitor product, consult [Insert generic product](#).

3. **Release the mouse button** once you have reached the desired location. The item is placed on the shelving.
4. Once a product has been placed in your planogram, its thumbnail background changes to a lighter color in the catalog, helping you identify the products already used:



Notes on the number of products placed:

When you place a product with **standard**, **stackable** or **pegged** behavior, PlanogramBuilder automatically places as many instances in depth as possible on the shelf depth, unless you have predefined **Facings deep** in the database for this product.

- Only 1 **Facings wide** and 1 **Facings high** is placed by default.
- After placing the product, you can change the number of instances that should be placed. This can be done by specifying values in **Item Info** or with the mouse in **Adjust product quantity**.
- Products with **tester** behavior are always placed as single instances in front of other products.

Tips:

- If there is no back panel on your bay, make sure to position your mouse cursor exactly on a shelf when you release the product, otherwise the product won't be placed on the shelf.
- There are times when you may want to temporarily disable collisions to avoid displacing other products while placing a product. Hold the **C** key pressed while dragging the product to achieve this. Collisions can also be entirely disabled in **Collisions (Settings)**, or for specific products in **Collisions (Item properties)** in case they must overlap.
- You can lock accessories in place (**Locked accessories**) to prevent accidentally moving existing accessories while placing products.
- If you have room elements in your project, you may want to hide them while working with products, so the walls are not blocking the view of shelving (consult **View the room**).
- By default, the actual hooks are displayed in PlanogramBuilder for pegged products. To toggle visibility of the hooks, consult **View peg hooks**.
- You can control the area where products can be placed by setting margins in **Parameters (Selected shelves)** and in **Parameters (Selected back panels)**.
- You can allow products straddling on 2 bay components in **Allow lateral overhang (Selected shelves)** and in **Allow lateral overhang (Selected back panels)**.
- You can configure the application so products are automatically positioned adjacent when they are close to each other (**Auto snap distance**).

- You can limit the number of products allowed on any shelf with [Max. of products on width](#).

Replacing products in a planogram

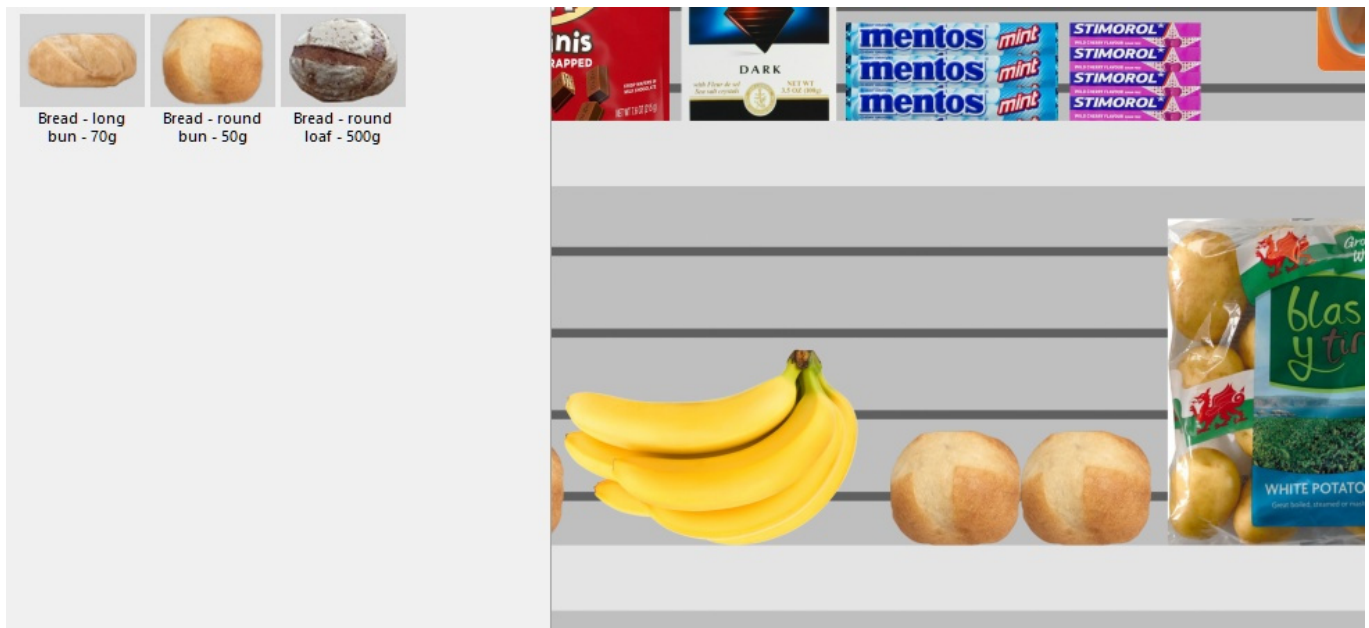
You can replace a product already in your planogram by a product from the catalog. This lets you exchange products in a slot quickly without having to manually delete the product to replace.

Instructions:

- Press** and **hold your mouse** button and the **Alt key** on a product in the catalog.
- Drag** the product from the catalog over the product to replace in your planogram.



- Release the mouse button** and the **Alt key**.
- The product replaces the old product.



Notes:

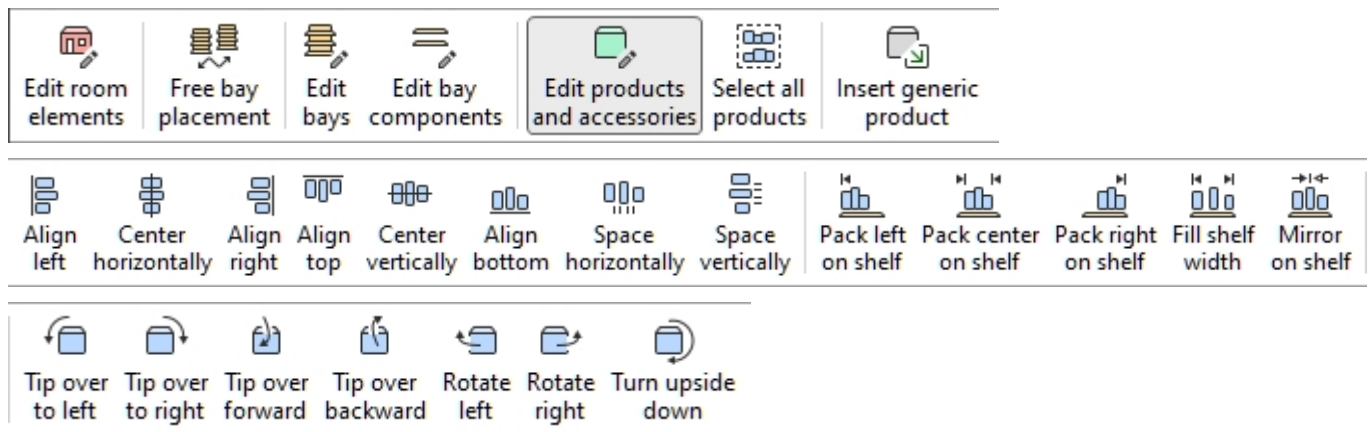
When you replace a product, all parameters of the replaced product are transferred to the new product ([Product behaviors](#), [Collisions \(Item properties\)](#), [Width gap](#), etc.), except the number of instances ([Facings wide](#), [Facings high](#), [Facings deep](#)) which is automatically computed as follows:

- The new product will have as many instances as can fit in the space used by the old product block.
- If the new product is larger than the old product block, it will still be placed if there is enough space between the neighboring items.
- If there is not enough space between the neighboring items to place at least one new instance of the new product, the replacement isn't performed.

E.g., if you replace a product by one that has the exact same dimensions, the same quantity is placed in the space.

Tools and commands (Products)

The object editing toolbar includes several tools and commands to work with products in your current planogram:



Some additional commands that also apply to most objects can be found in another toolbar described in [General edit commands](#):

- [Undo \(Edit\)](#)
- [Redo \(Edit\)](#)
- [Cut \(Edit\)](#)
- [Copy \(Edit\)](#)
- [Paste \(Edit\)](#)
- [Delete \(Edit\)](#)

All the tools and commands to work with products are also available in [Main Menu](#) > **Edit**:

Undo	Ctrl+Z
Redo	Ctrl+Y
Cut	Ctrl+X
Copy	Ctrl+C
Paste	Ctrl+V
Delete	Delete
Edit room elements	R
Free bay placement	
Edit bays	B
Edit bay components	S
Edit products and accessories	I
Select all products	Ctrl+A
Align and space	>
Rotate products	>
Insert generic product	N
Fit width to bay	

Align left	Ctrl+L
Center horizontally	Ctrl+E
Align right	Ctrl+R
Align top	Ctrl+T
Center vertically	Ctrl+M
Align bottom	Ctrl+B
Space horizontally	
Space vertically	
Pack left on shelf	
Pack center on shelf	
Pack right on shelf	
Fill shelf width	
Mirror on shelf	

Tip over to left	◀
Tip over to right	▶
Tip over forward	▼
Tip over backward	▲
Rotate left	
Rotate right	
Turn upside down	U

The tools and commands which are specific to **products** are described below.

Edit products and accessories

This tool lets you select Items (products and accessories) to perform various operations such as editing their properties, moving and copying them.

- Keyboard shortcut: **I**

Instructions:

- Click on the button labeled **Edit products and accessories**.
- Type the shortcut key (**I**).
- Or click on the command in the main menu > Edit > Edit products and accessories.

Note: The keyboard shortcut and the menu command activate this tool without automatically switching to any corresponding task: [Products](#), [Accessories](#), [Item Info](#).

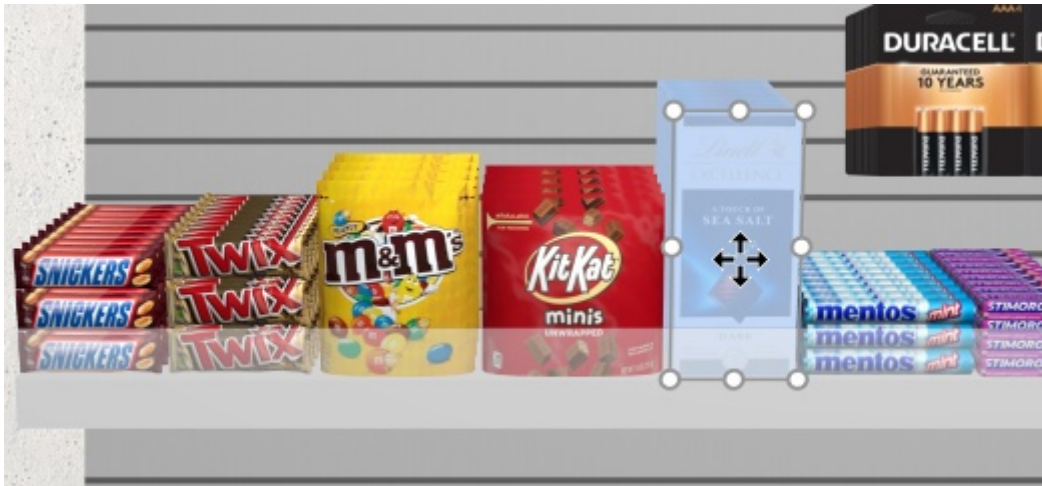
Select (Edit products and accessories)

To select items, first activate [Edit products and accessories](#).

Note: Selected products are tinted in blue.

Select 1 item, there are 2 methods:

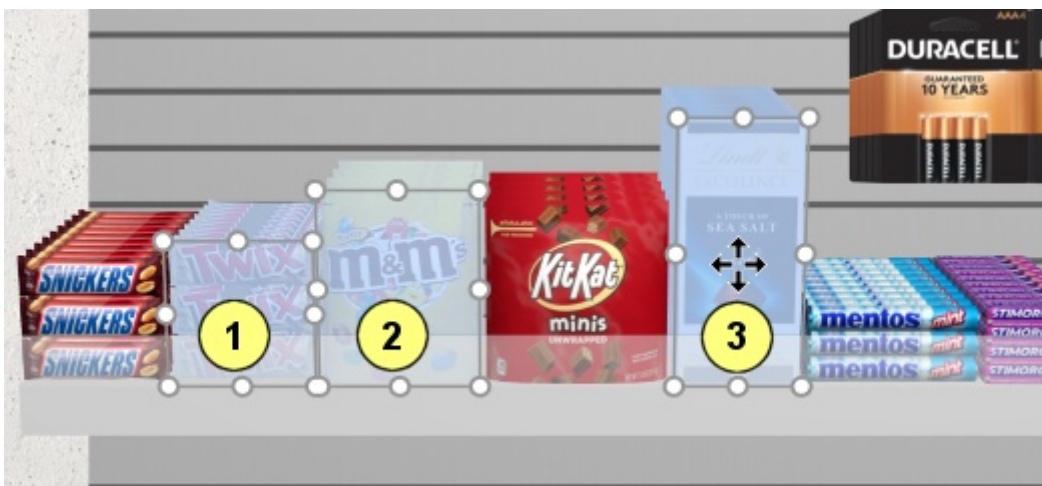
- Method 1: click on an item in the visualization area.



- Method 2: click on an item line in [Project item list](#).

Select several items, there are 4 methods:

- Method 1: hold **Ctrl** and **click** on each desired item in the visualization area.



- Method 2: hold **Ctrl** and **click** on each desired item in [Project item list](#).

- Method 3: by range:
 - a. Hold **Shift** and **Click** on an item.
 - b. **Click** on another item on the same row or same shelf.
 - c. The clicked items, plus the items in between become selected.



- Method 4: by rectangle:
 - a. **Press the mouse button** somewhere in the visualization area where there is no item.
 - b. Keep the mouse button pressed and **drag your cursor** to another point in the visualization area: this will draw a blue rectangle on the screen.
 - c. **Release the mouse button**: all the items that are within or cross the blue rectangle become selected.



Select all products

Use the dedicated command in the **main menu** > **Edit** > **Select all products**. *Note:* this command doesn't select any accessory.

- Keyboard shortcut: **Ctrl + A**

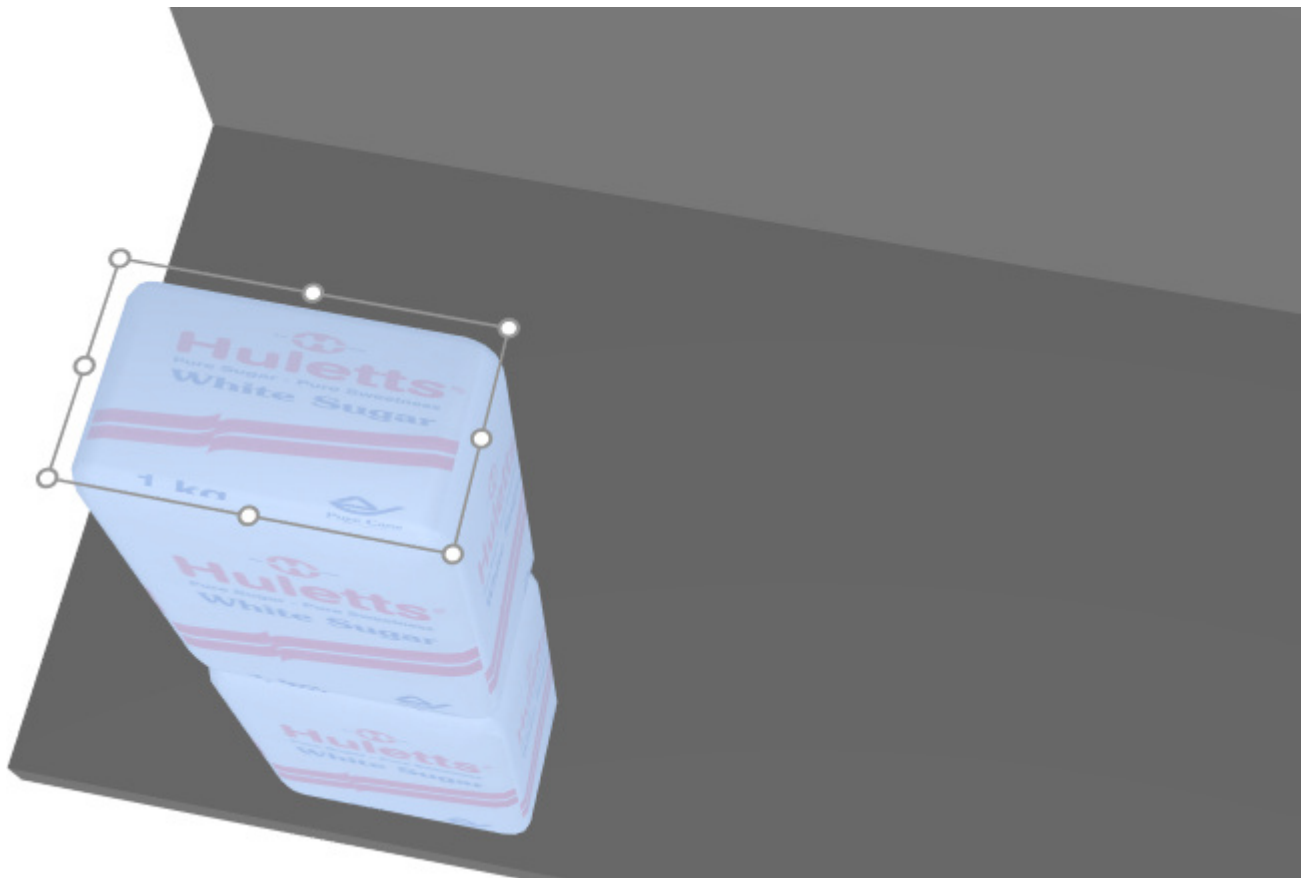
To deselect products and accessories:

- To deselect one item at a time, hold **Ctrl** and **click** on each item to deselect in the visualization area or in [Project item list](#).
- To deselect several items, hold **Ctrl** and **draw a rectangle** across the items to deselect in the visualization area.
- To deselect all items, **click on an empty** area of the visualization area.

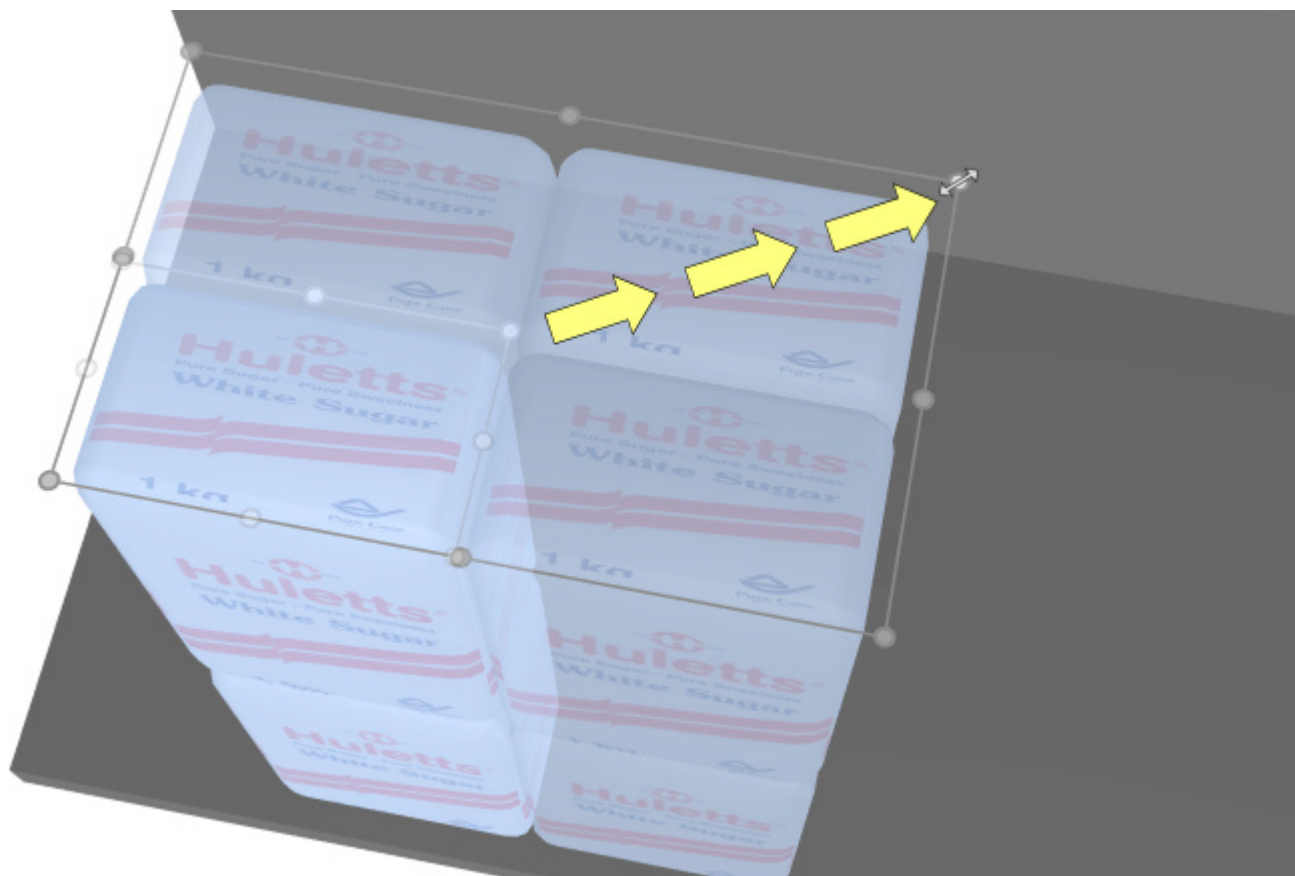
Adjust product quantity

You can change the quantity of selected products in a planogram in each direction with your mouse.

1. Activate this tool: [Edit products and accessories](#).
2. Select products only (consult [Select \(Edit products and accessories\)](#)). They become highlighted with round handles around the surfaces most closely facing the screen.
3. If the round handles do not appear on the selected products, use [Zoom](#) to enlarge them on screen. If the round handles do not appear on the desired surface, use [Orbit](#) to make the desired surfaces face the screen.

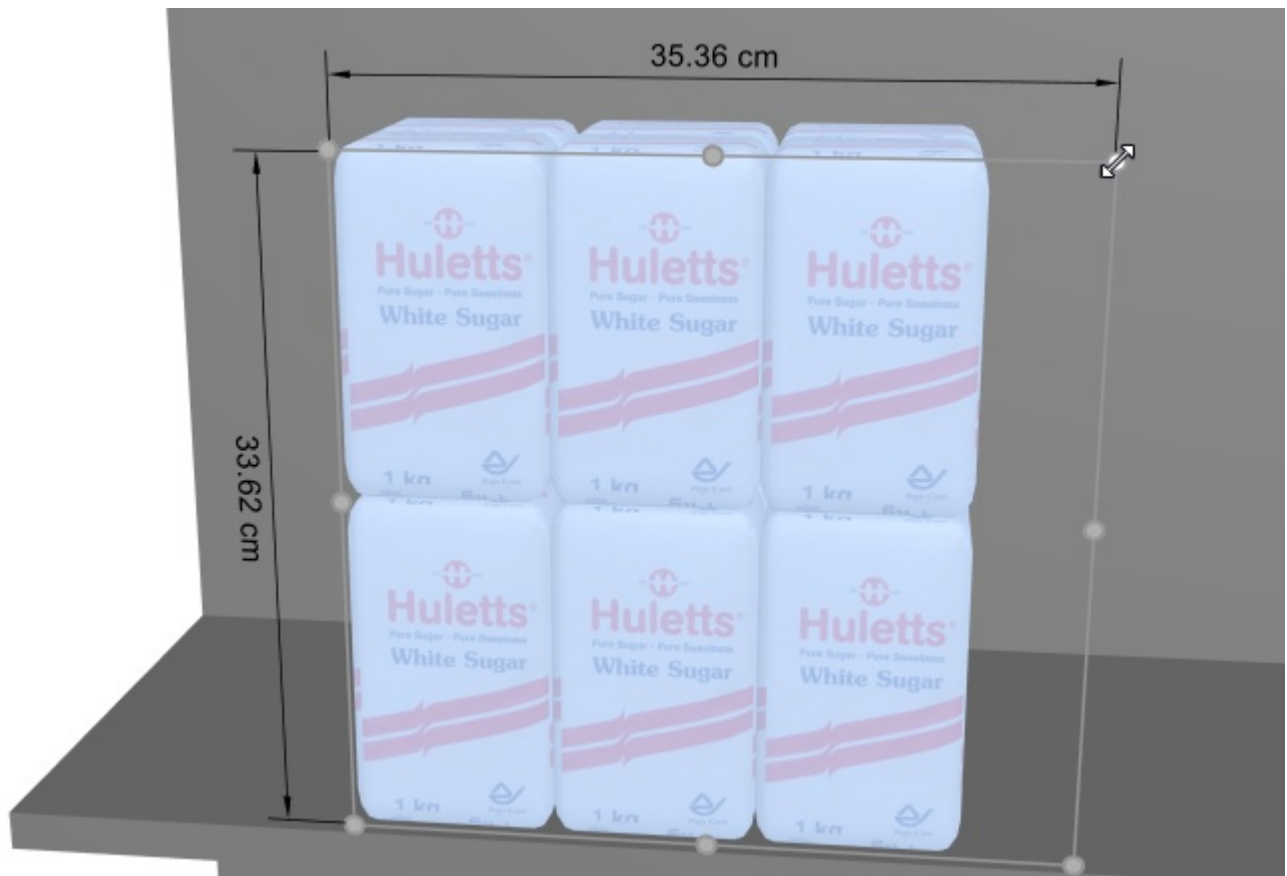


4. **Grab a handle with the mouse and drag** it in the desired direction(s) until your products reach the desired quantity. The corner handles let you adjust in two directions; while the handles along edges let you constrain the adjustment to one direction.

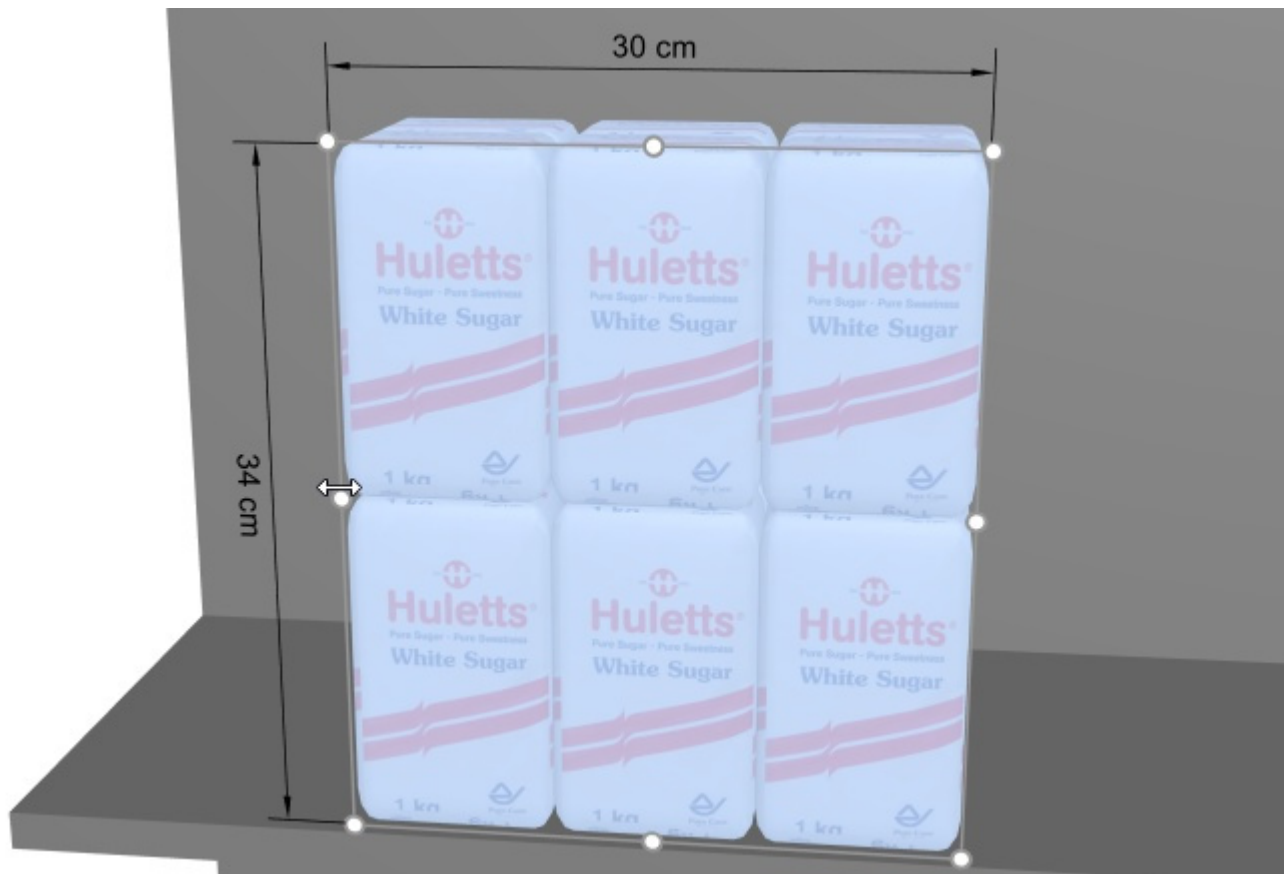


5. **Release** the mouse button when you are satisfied with the quantity.

Tip: [View dimensions](#) is useful to see the space to allocate to the product:



Tip: [View dimensions](#) is also useful to display the actual exact dimensions used by each block of same products by pressing on a handle of the selected product:



Keyboard shortcuts:

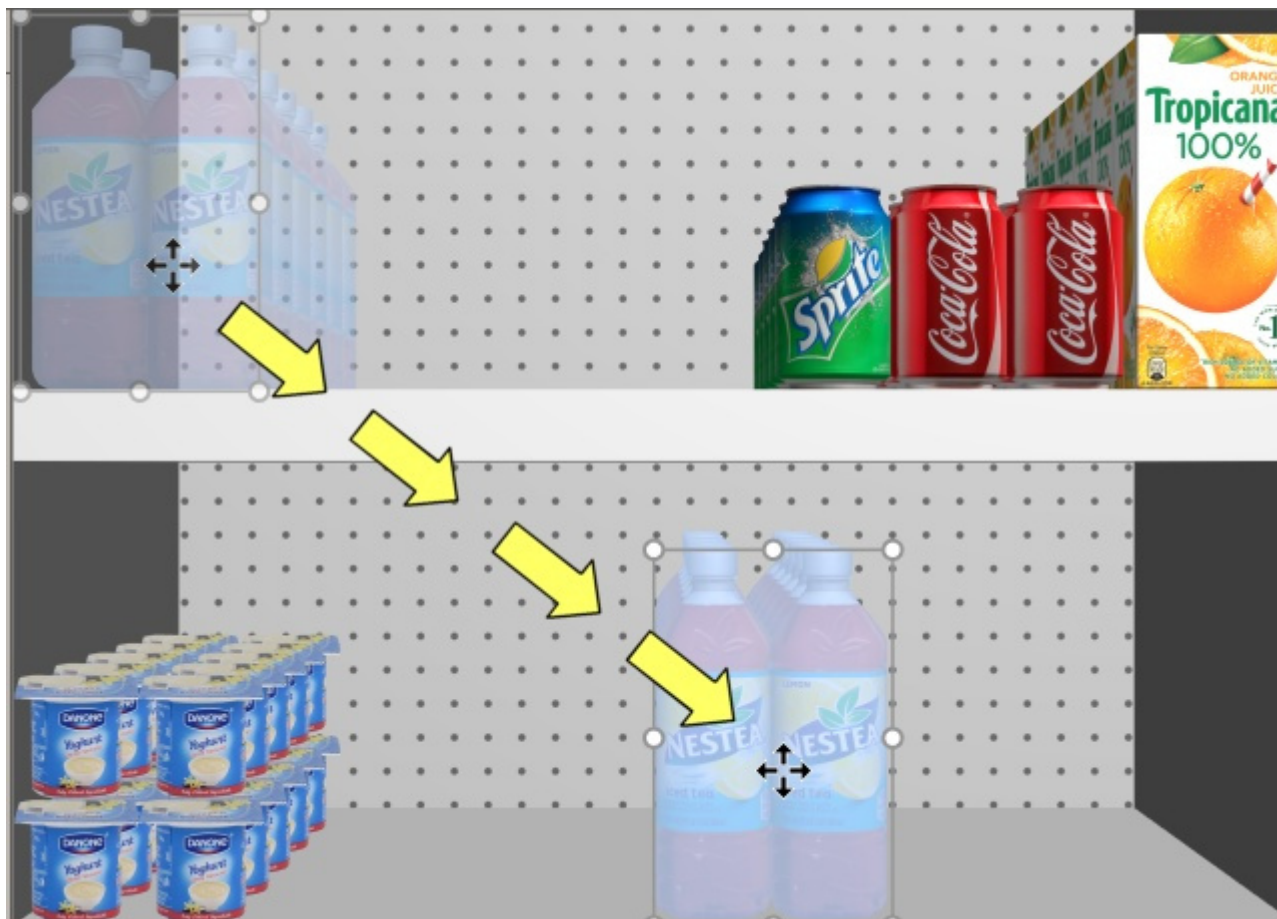
- Increase / decrease **Facings deep**: Press the **+** and **- keys** on your numeric keypad.
- Increase / decrease **Facings wide**: Hold the **Shift key** and press the **+** and **- keys** on your numeric keypad.
- Increase / decrease **Facings high**: Hold the **Space key** and press the **+** and **- keys** on your numeric keypad.

Tip: You can also set the quantities of products by specifying numeric values in [Item Info](#).

Move (Edit products and accessories)

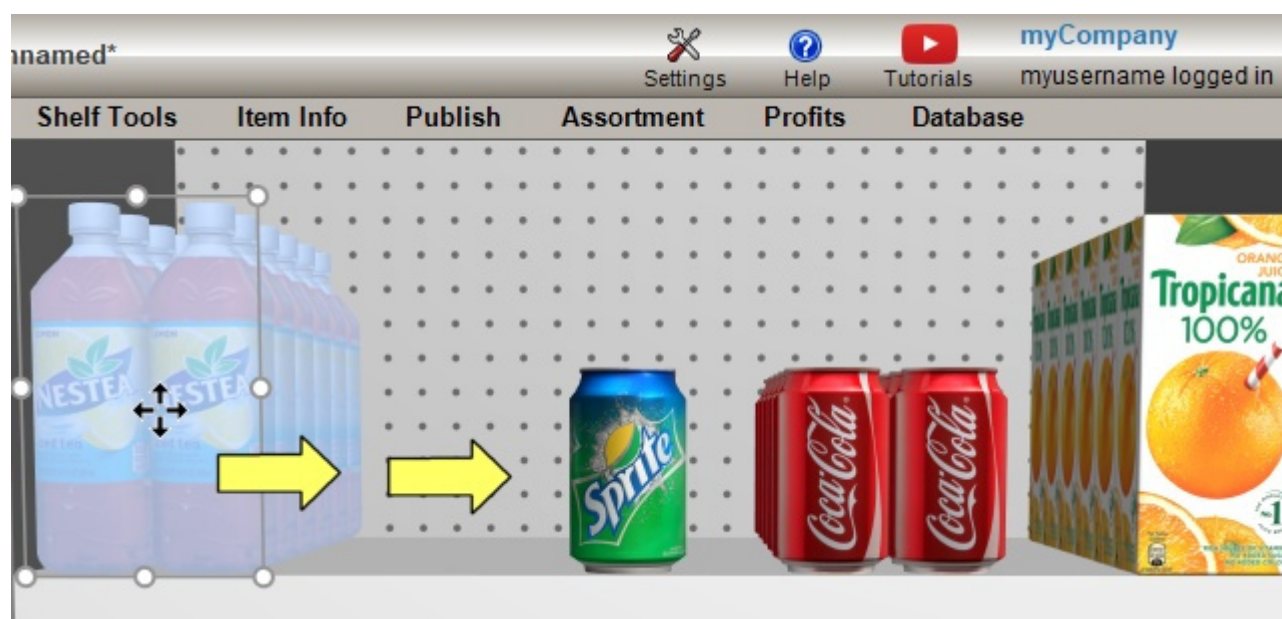
You can move items with the mouse in your current planogram.

1. Activate this tool: [Edit products and accessories](#).
2. [Select \(Edit products and accessories\)](#).
3. **Press and hold the mouse** button with the pointer over the selected items and drag the mouse to the desired new position, even to another bay.
4. **Release the mouse** button. The items are now in the new position.

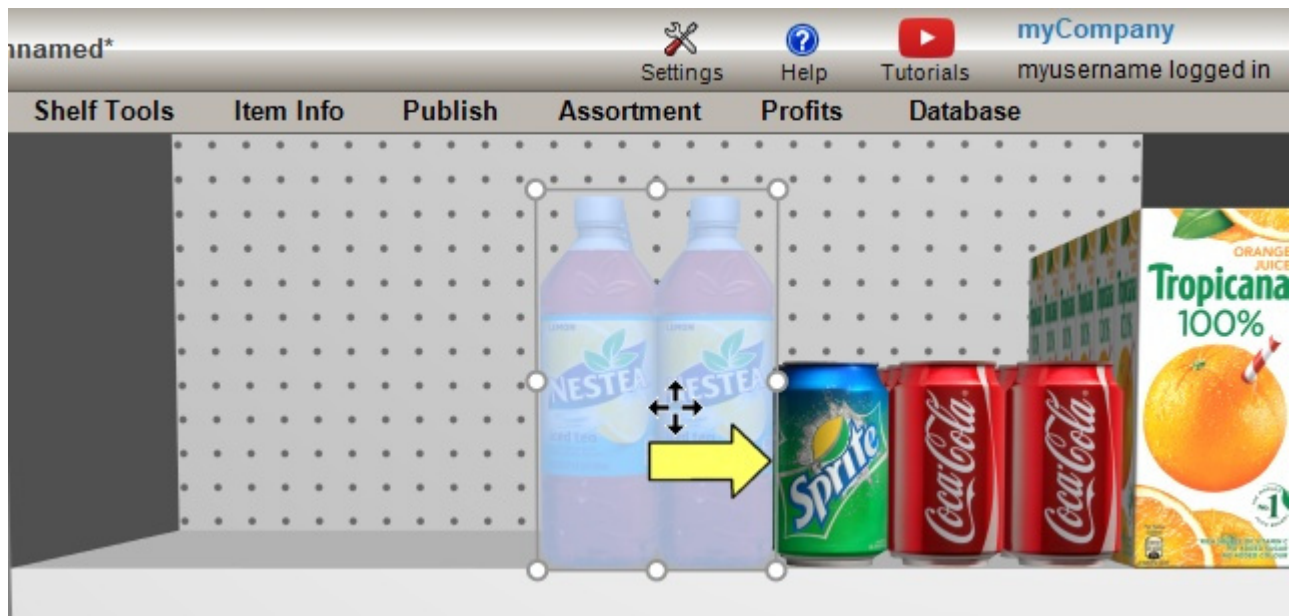


If there is some empty space between items, it is very easy to close these gaps thanks to the collision detection feature:

1. Select items.
2. Drag them against other items.



3. The other items will be pushed along the shelf much like in the real world:



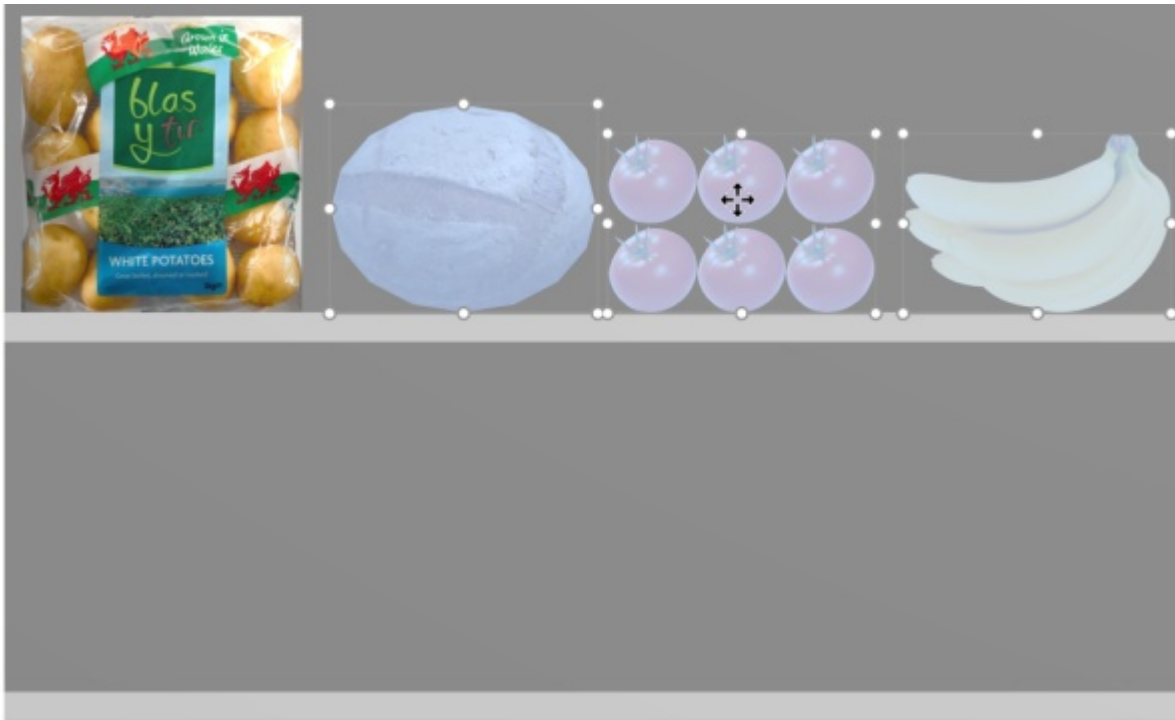
Tips:

- If you want to move one or more pegged products to a shelf or vice versa: hold the **shift** key until you drop the products in position, thereby switching their behavior on the fly.
- There are times when you may want to temporarily disable collisions to avoid displacing other products while moving a product. Hold the **C** key pressed while dragging the product to achieve this. Collisions can also be entirely disabled in [Collisions \(Settings\)](#), or for specific products in [Collisions \(Item properties\)](#) in case they must overlap.
- You can lock accessories in place ([Locked accessories](#)) to prevent accidentally moving existing accessories while moving products.
- To allow products straddling on 2 bay components, consult [Allow lateral overhang \(Selected shelves\)](#), [Allow lateral overhang \(Selected back panels\)](#).
- You can configure the application to automatically position products adjacent when they are close to each other ([Auto snap distance](#)).

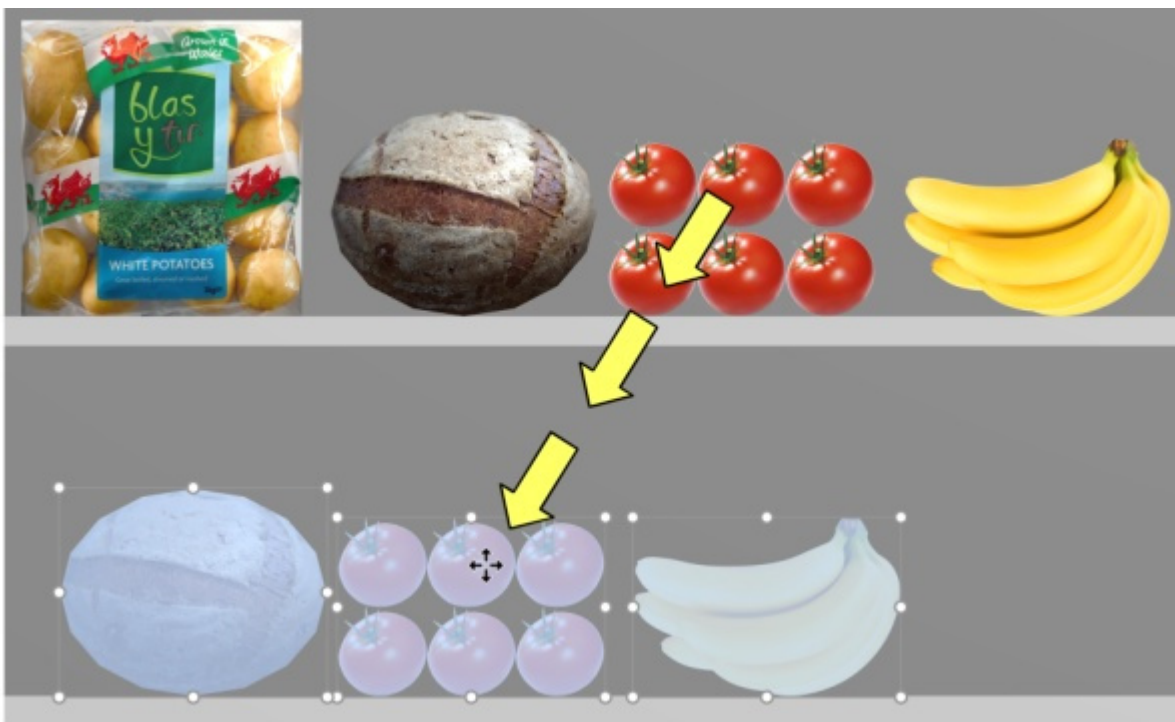
Copy by moving (Edit products and accessories)

Copying is almost the same process as [Move \(Edit products and accessories\)](#):

1. Select items.



2. Hold **Ctrl**.
3. Drag the items to the desired location.



4. Release the mouse button.
5. The items are duplicated at the desired location.

Important note: Do not use the copy function to create a block of the same products. You should instead adjust the number of instances of the products in [Item Info](#) ([Facings wide](#), [Facings high](#), [Facings deep](#)).

Note: Collision detection is automatically disabled when copying products.

Tips:

- You can also use the commands named [Copy \(Edit\)](#) and [Paste \(Edit\)](#) to copy products, even between different projects.
- When you copy a generic product, it creates a new independent generic product which can then be edited to have distinct characteristics such as dimensions, name, etc. Consult [Insert generic product](#).

Insert generic product

Sometimes, you may need to include in your planograms some products that are not available in your database, such as seldom used competitor products. In this case, PlanogramBuilder lets you create some 3D generic products as simple blocks in your current planogram.

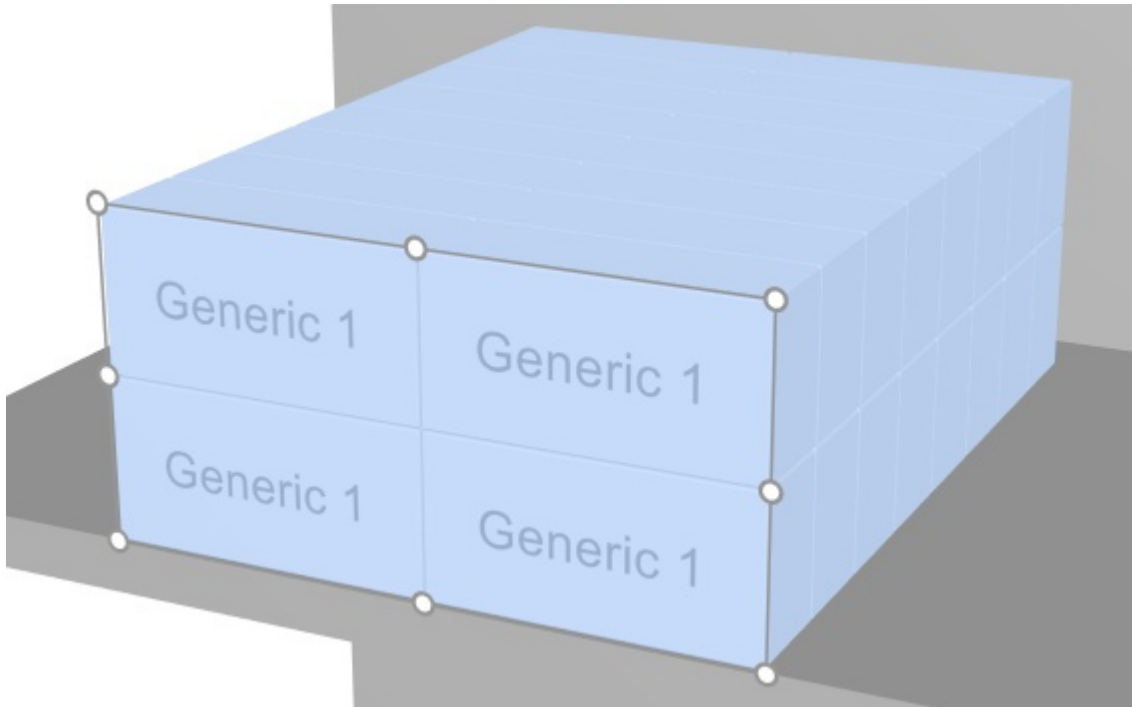
- Keyboard shortcut: **N**

Instructions:

1. Click on **Insert generic product** on the toolbar or in the main **menu > Edit**.
2. The method to place your product depends on where you want it:
 - a. To place it on a shelf, put your mouse cursor over the area of a shelf where you want to add the product.
 - b. To place it on a back panel, hold **Shift**, put your mouse cursor over the area of a back panel where you want to add the product.
3. Click the left mouse button to confirm and create the generic product.
4. Each generic product has default values for upon creation. To adjust its properties:
 - a. Activate the task named [Item properties](#).
 - b. Change the name, color, dimensions, the number of facings, etc.

Notes:

- Generic products have default values for upon creation. You can
- Generic products are always presented as simple boxes with no image.
- In standard view, a text label is displayed on the front showing the name of the product if has been defined. In [Schematic view](#), the label can show different information depending on Schematic view (Settings).
- You can also specify the font for the labels of generic products ([Font face](#), [Font height](#)).
- Generic products are only saved in your current project, but not in the database. If you wish to add products to the database (so that they are shown in the catalog), consult [Database](#) for detailed instructions.
- If you copy a generic product (consult [Copy by moving](#)), it creates a new independent generic product which can then be edited to have distinct characteristics.



Example of a block of a generic product with a name.

Align and space (products and accessories)

There is a series of handy commands available to distribute multiple items on the shelves.

Instructions:

1. Activate this tool: [Edit products and accessories](#).
2. Select the products to align. They become highlighted and a move pointer is displayed.
3. Click on one of the align commands on the object editing toolbar or in **Main Menu > Edit > Align and space**.
4. The products are now repositioned accordingly as described below.

Note: Collision detection is automatically disabled when aligning or spacing items.

Important tip: Please make sure to check the description of [Spacing applies to each facing](#) because this setting affects the way spacing commands are applied.

The following commands are available:

Align left (products and accessories)

Align the selected objects horizontally to their leftmost edge.

- Keyboard shortcut: **Ctrl + L**

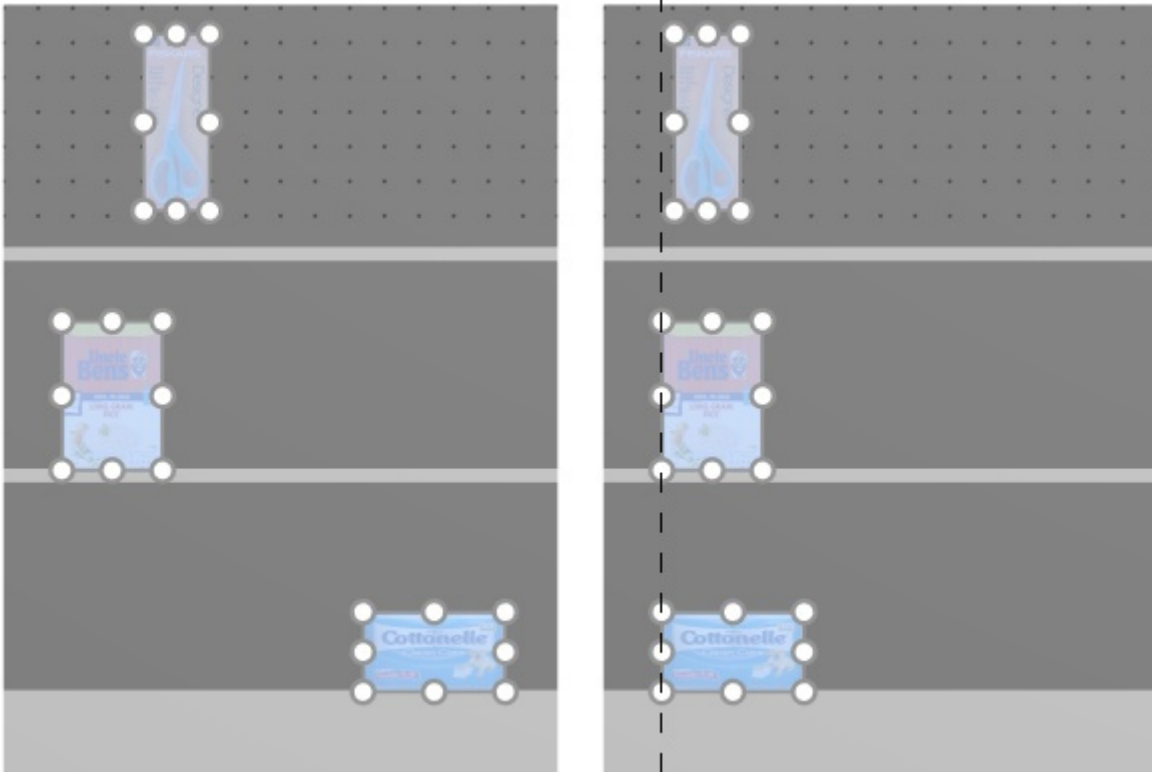


Image on the left: Before alignment

Image on the right: Align left (products and accessories)

Notes:

- Products which are on pegboards are repositioned to the hole which is closest to the virtual alignment line, so not exactly left aligned with other products.
- You can also apply this command to items placed across several bays if the bays are placed side by side, parallel and not too distant from each other.

Center horizontally (products and accessories)

Align the selected objects to their horizontal center.

- Keyboard shortcut: **Ctrl + E**

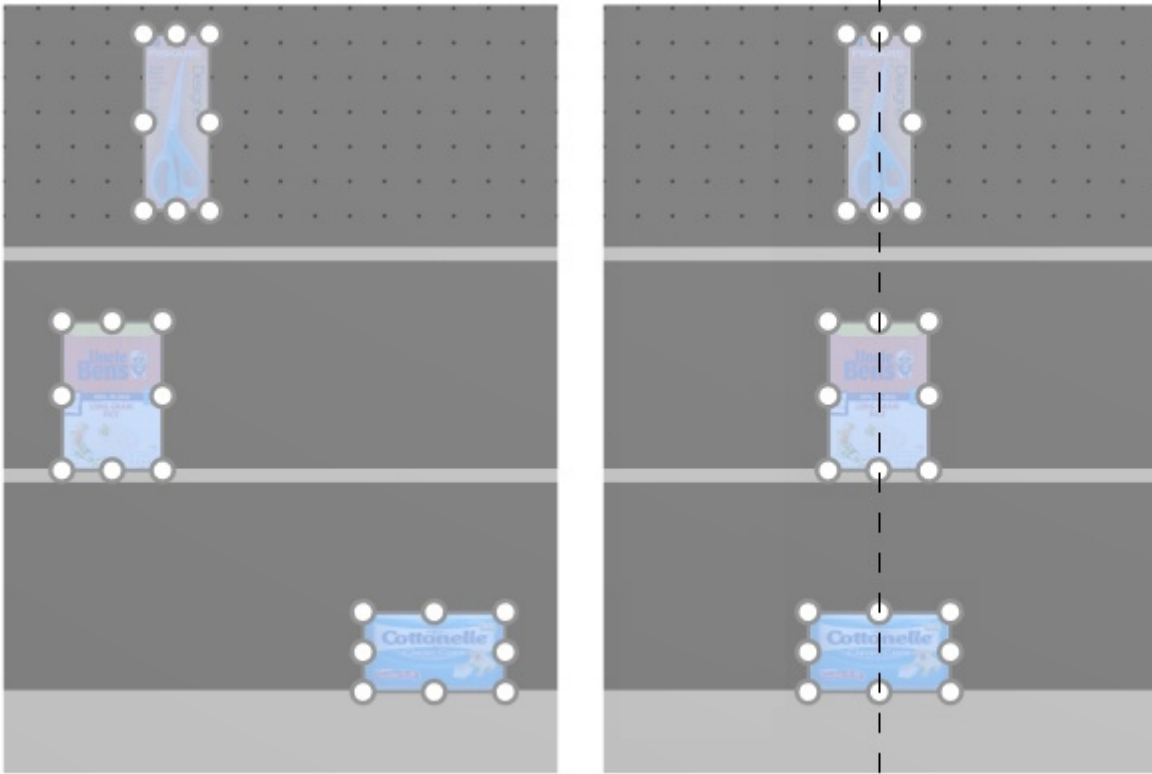


Image on the left: Before alignment

Image on the right: Center horizontally (products and accessories)

Notes:

- Products which are on pegboards are repositioned to the hole which is closest to the virtual alignment line, so not always exactly aligned with other products.
- You can also apply this command to items placed across several bays if the bays are placed side by side, parallel and not too distant from each other.

Align right (products and accessories)

Align the selected objects horizontally to their rightmost edge.

- Keyboard shortcut: **Ctrl + R**

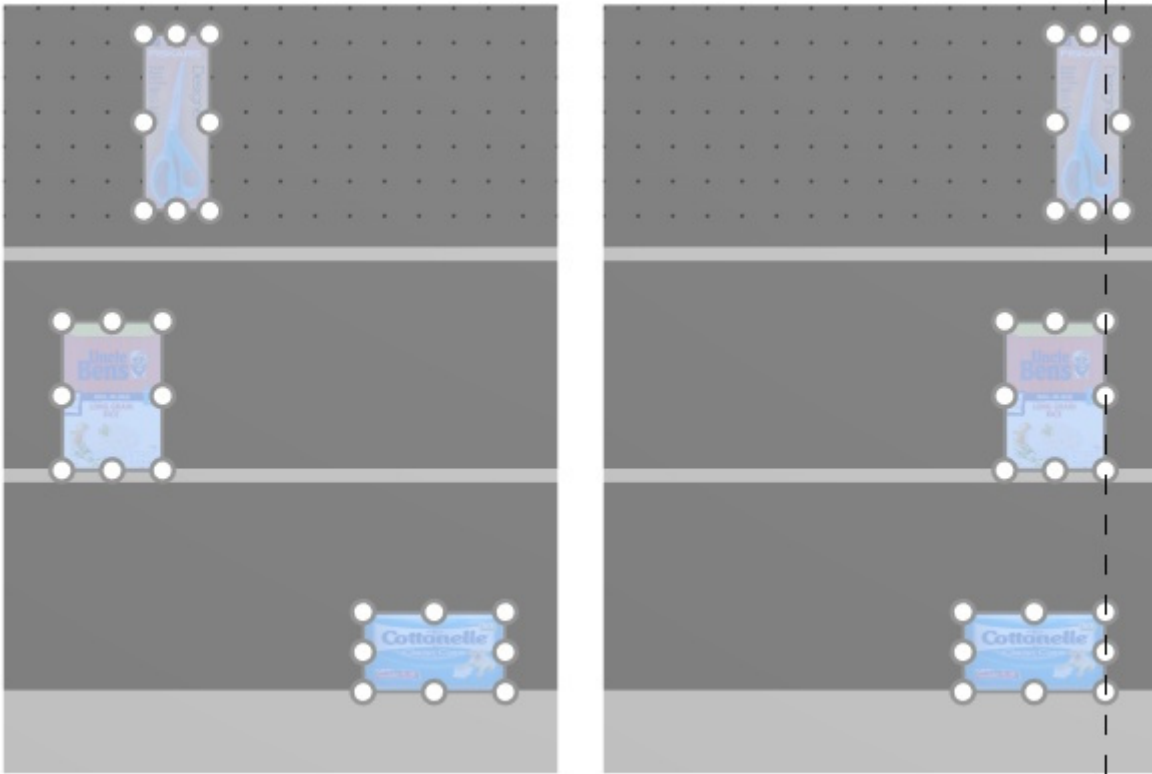


Image on the left: Before alignment

Image on the right: Align right (products and accessories)

Notes:

- Products which are on pegboards are repositioned to the hole which is closest to the virtual alignment line, so not exactly left aligned with other products.
- You can also apply this command to items placed across several bays if the bays are placed side by side, parallel and not too distant from each other.

Align top (products and accessories)

Align the selected objects vertically to their topmost edge.

- Keyboard shortcut: **Ctrl + T**

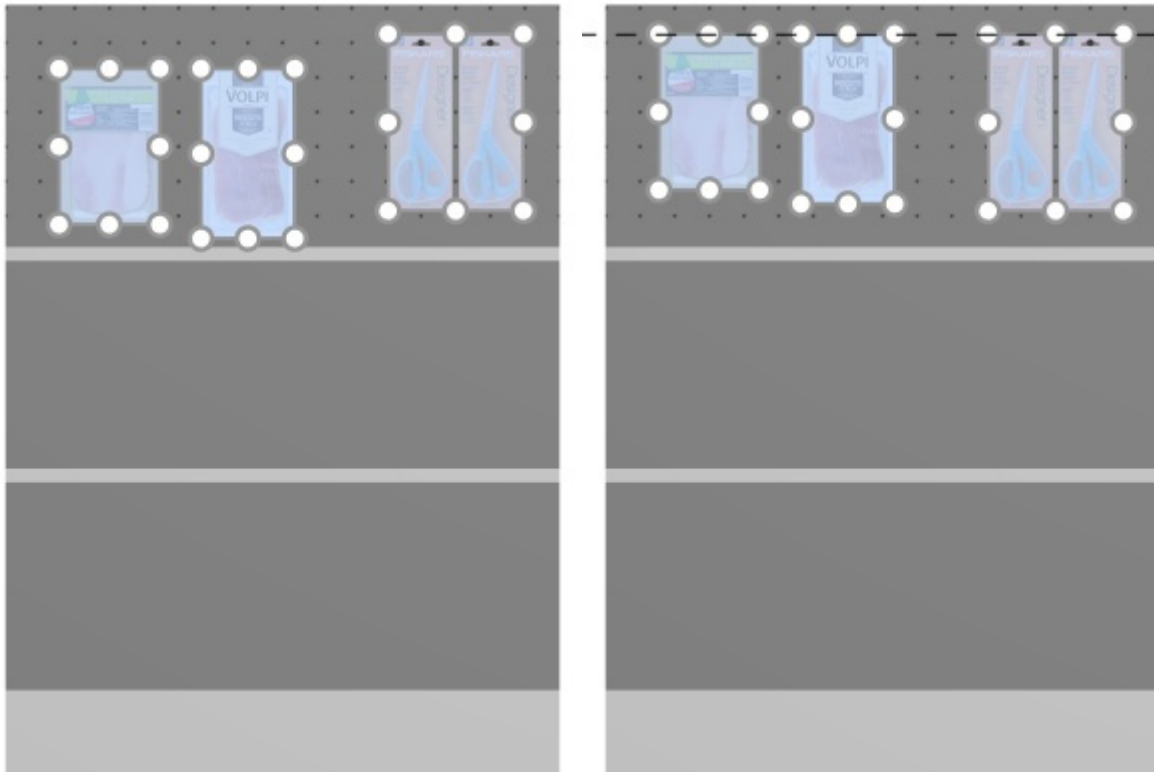


Image on the left: Before alignment

Image on the right: Align top (products and accessories)

Notes:

- Products which are on pegboards are repositioned to the hole which is closest to the virtual alignment line, so not exactly left aligned with other products.
- You can also apply this command to items placed across several bays if the bays are placed side by side, parallel and not too distant from each other.

Center vertically (products and accessories)

Align the selected objects to their vertical center.

- Keyboard shortcut: **Ctrl + M**

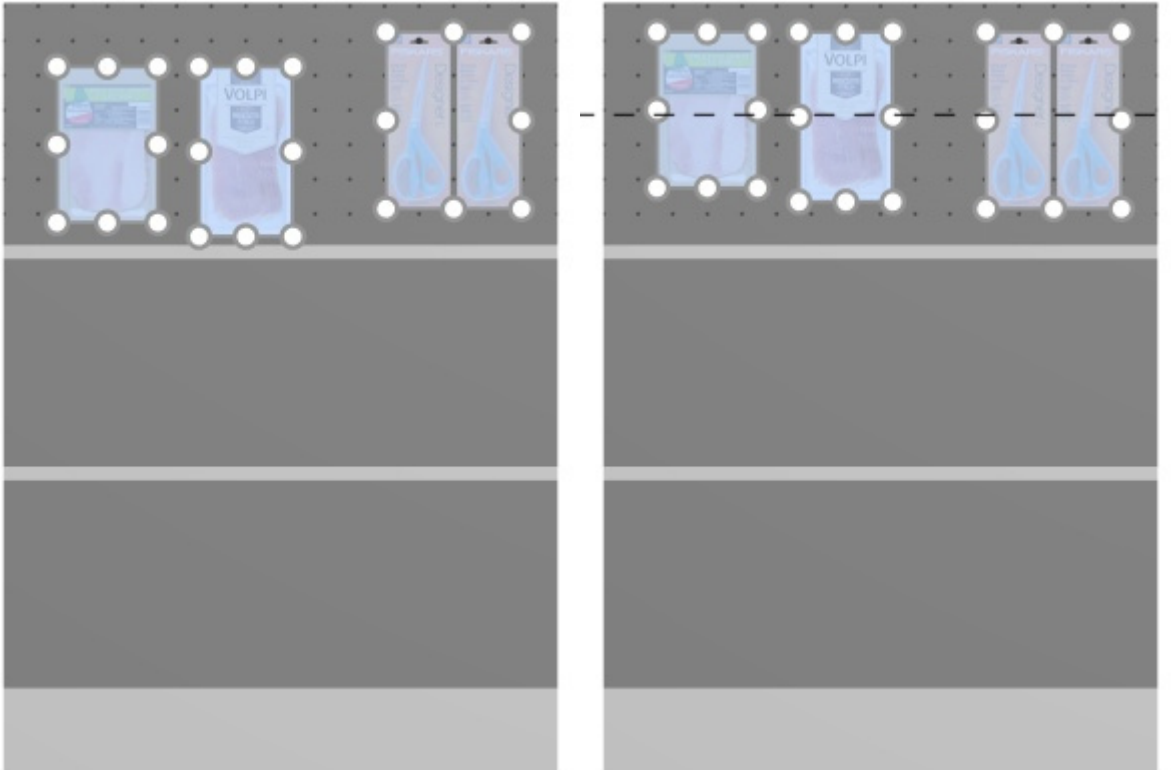


Image on the left: Before alignment

Image on the right: Center vertically (products and accessories) Align top (products and accessories)

Notes:

- Products which are on pegboards are repositioned to the hole which is closest to the virtual alignment line, so not always exactly aligned with other products.
- You can also apply this command to items placed across several bays if the bays are placed side by side, parallel and not too distant from each other.

Align bottom (products and accessories)

Align the selected objects vertically to their lowest edge.

- Keyboard shortcut: **Ctrl + B**

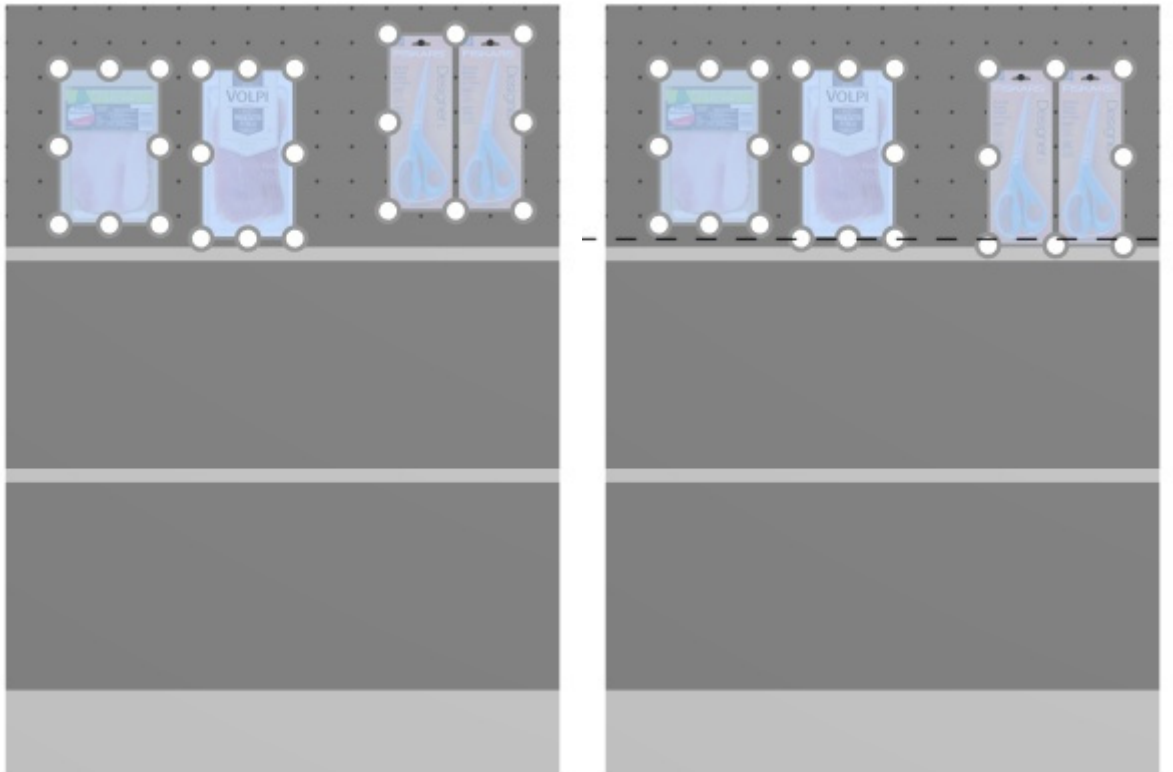


Image on the left: Before alignment

Image on the right: Align bottom (products and accessories)

Notes:

- Products which are on pegboards are repositioned to the hole which is closest to the virtual alignment line, so not exactly left aligned with other products.
- You can also apply this command to items placed across several bays if the bays are placed side by side, parallel and not too distant from each other.

Space horizontally (products and accessories)

Distribute the selected objects horizontally with an equal gap between them without changing the total space used.

For groups of multiple same products in width with [Width gap](#), the effect varies depending on the setting named [Spacing applies to each facing](#) as illustrated in the examples below.

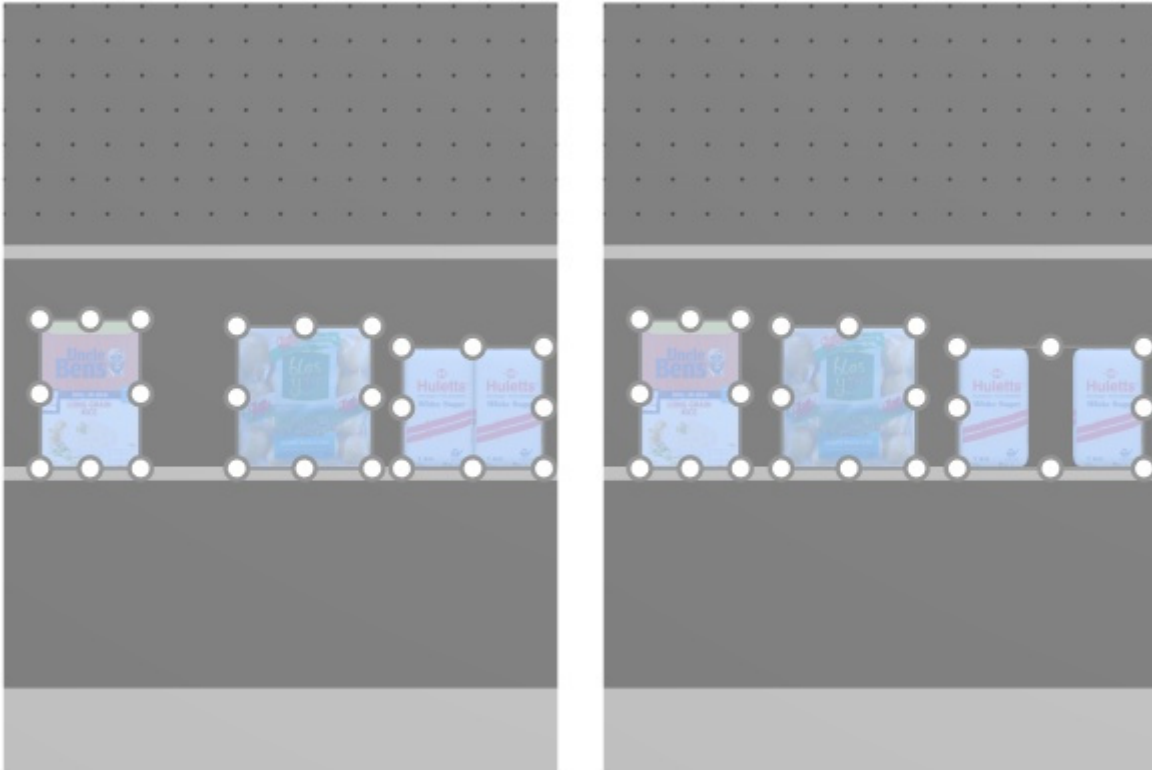


Image on the left: Before spacing

Image on the right: Space horizontally (Spacing applies to each facing checkmarked)

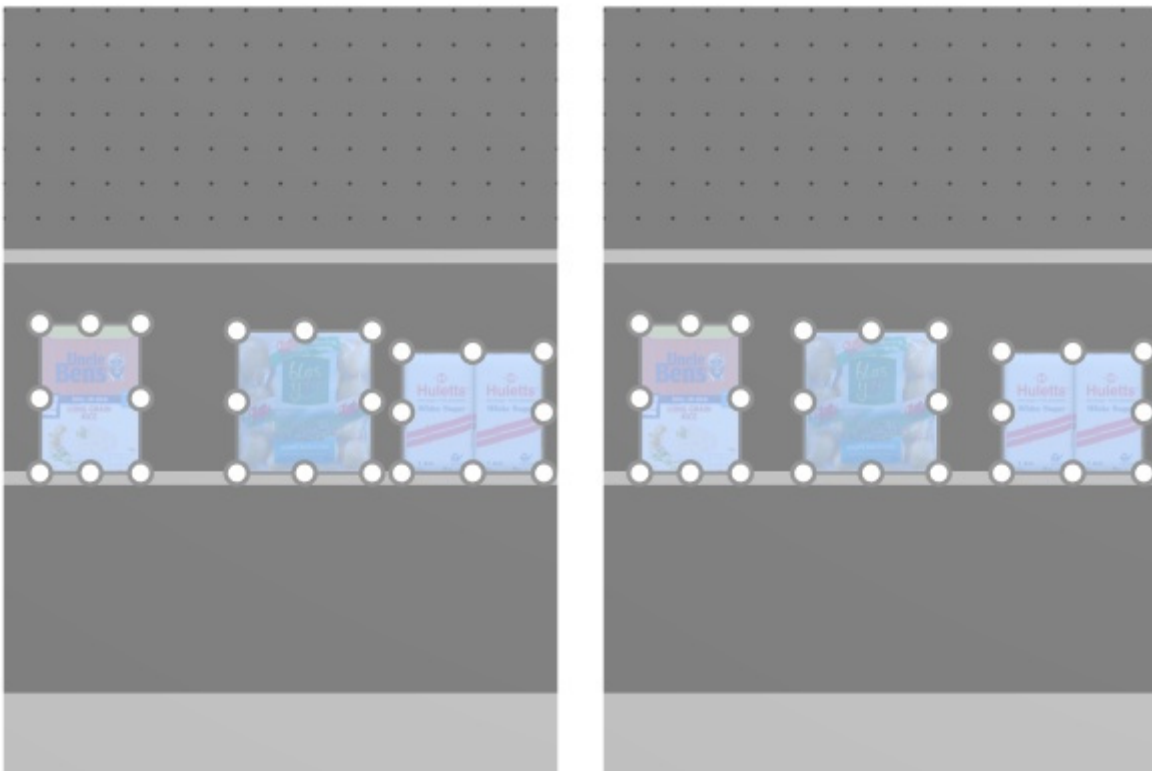


Image on the left: Before spacing

Image on the right: Space horizontally (Spacing applies to each facing not checkmarked)

Notes:

- Products which are on pegboards are repositioned to the hole which is closest to obtain equal spacing, so not necessarily resulting in equal spacing.
- You can also apply this command to items placed across several bays if the bays are placed side by side, parallel and not too distant from each other.

Space vertically (products and accessories)

Distribute the selected objects vertically with an equal gap between them without changing the total space used.

For groups of multiple same products in height with [Height gap](#), the effect varies depending on the setting named [Spacing applies to each facing](#) as illustrated in the examples below.

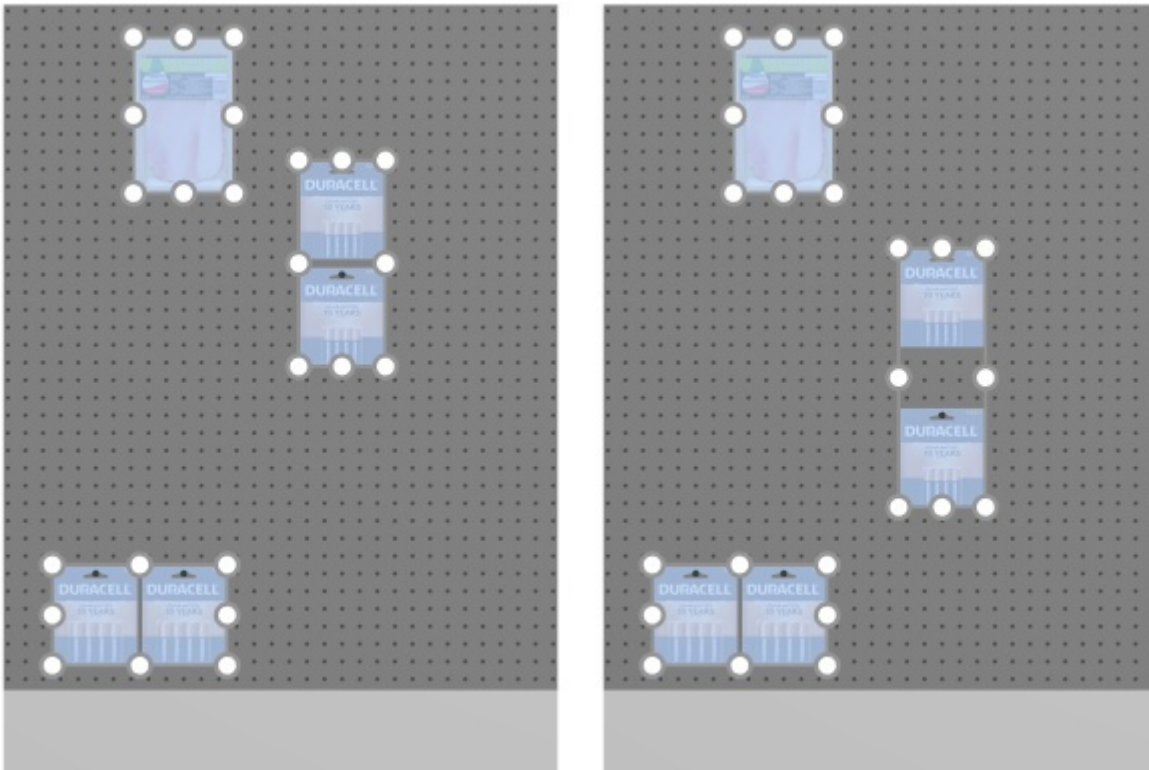


Image on the left: Before spacing

Image on the right: Space vertically (Spacing applies to each facing checkmarked)

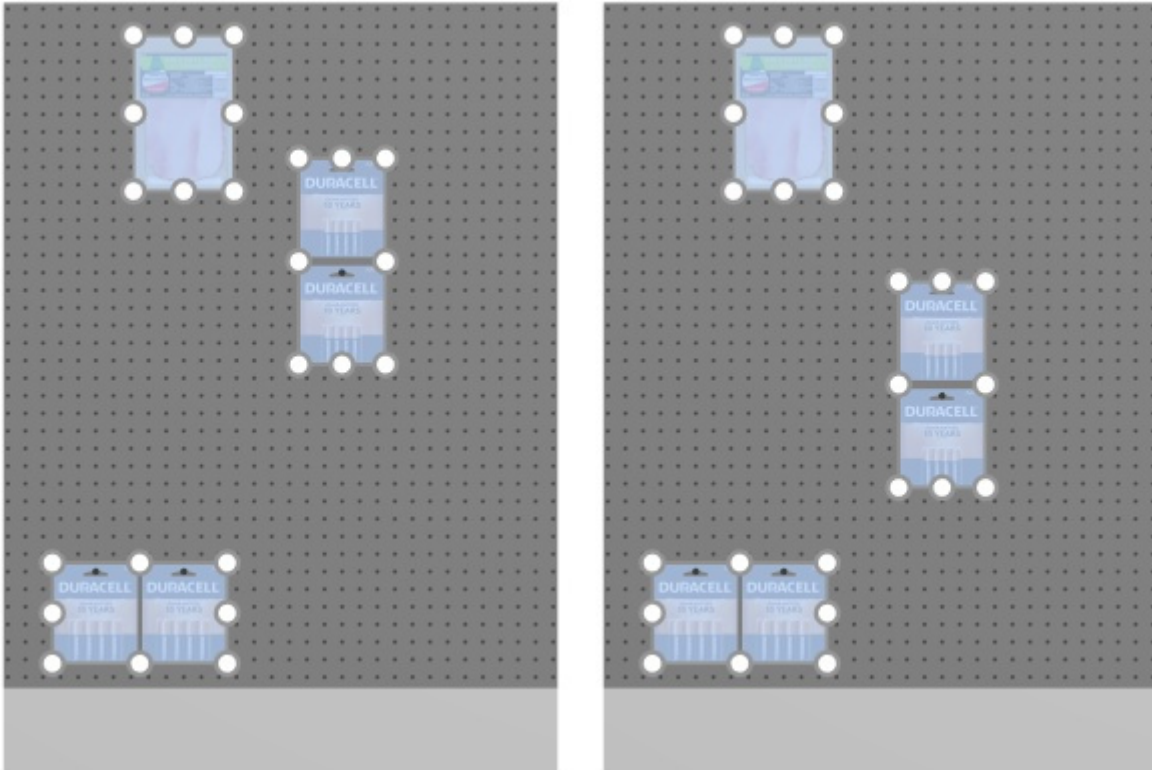


Image on the left: Before spacing

Image on the right: Space vertically (Spacing applies to each facing not checkmarked)

Notes:

- Products which are on pegboards are repositioned to the hole which is closest to obtain equal spacing, so not necessarily resulting in equal spacing.
- You can also apply this command to items placed across several bays if the bays are placed side by side, parallel and not too distant from each other.

Pack left on shelf (products and accessories)

Group the selected products against the left edge of their respective shelves or rows.

For groups of multiple same products in width with [Width gap](#), the effect varies depending on the setting named [Spacing applies to each facing](#) as illustrated in the examples below.

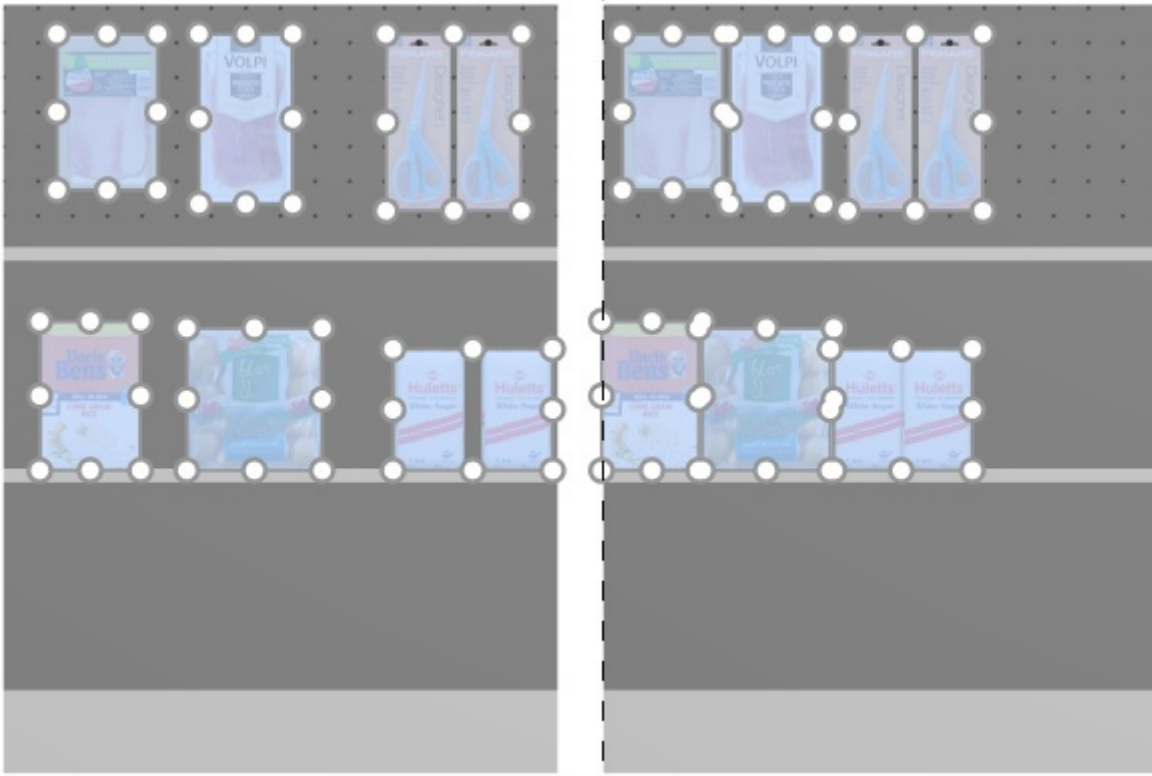


Image on the left: Before spacing

Image on the right: Pack left on shelf (Spacing applies to each facing checkmarked)

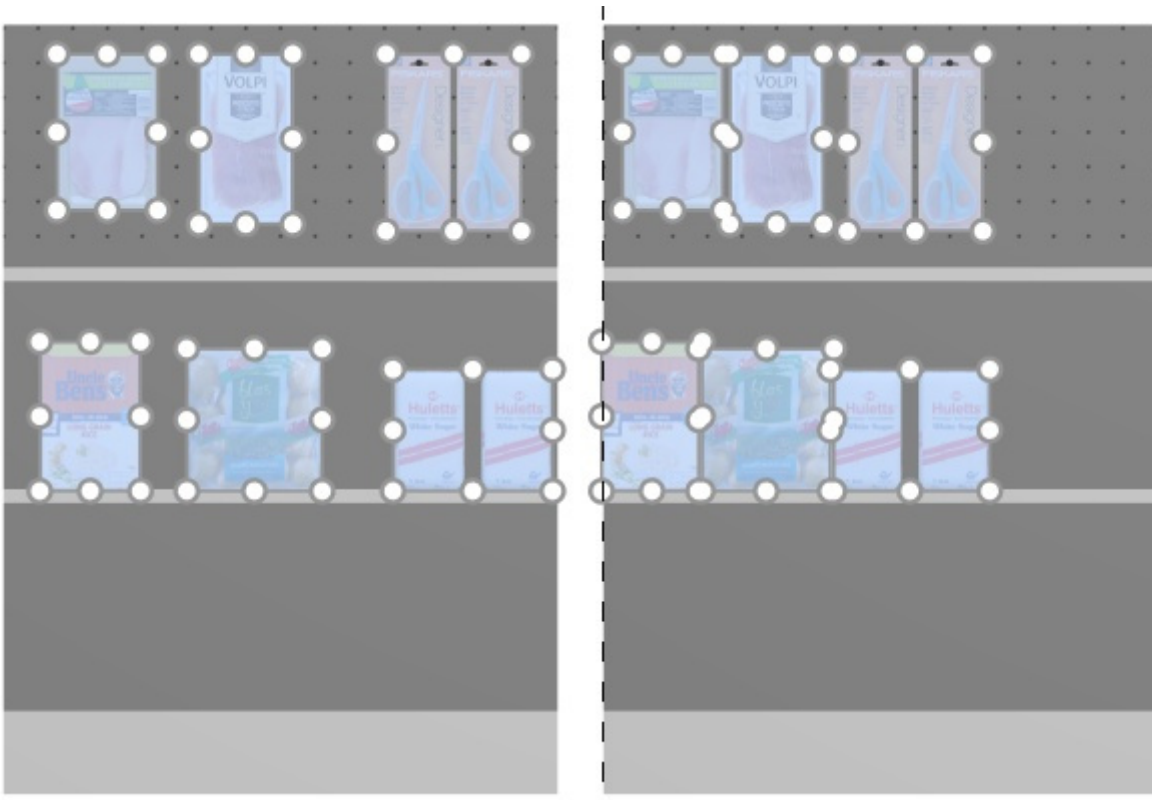


Image on the left: Before spacing

Image on the right: Pack left on shelf (Spacing applies to each facing not checkmarked)

Notes:

- Products which are on pegboards are repositioned to the hole which is closest to obtain equal spacing, so not necessarily resulting in equal spacing.
- You can also apply this command to items placed across several bays if the bays are placed side by side, parallel and not too distant from each other.
- If you have allowed [Allow lateral overhang \(Selected shelves\)](#)/ [Allow lateral overhang \(Selected back panels\)](#) where the selected items are placed, PlanogramBuilder still tries to fit the products within the physical bounds of the shelves / rows. But if the selected products only fit on the shelf / row with an overhang, the minimal possible overhang is applied.

Pack center on shelf (products and accessories)

Group the selected products in the center of their respective shelves or rows.

For groups of multiple same products in width with [Width gap](#), the effect varies depending on the setting named [Spacing applies to each facing](#) as illustrated in the examples below.

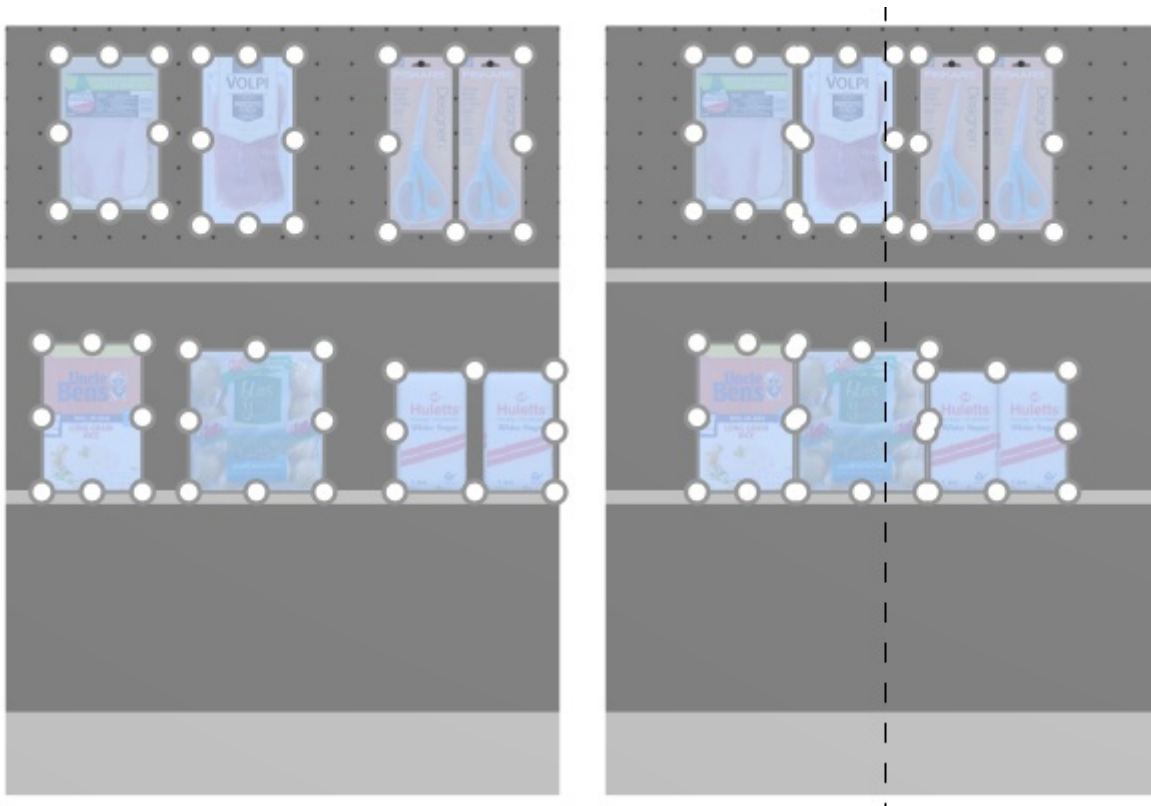


Image on the left: Before spacing

Image on the right: Pack center on shelf (Spacing applies to each facing checkmarked)

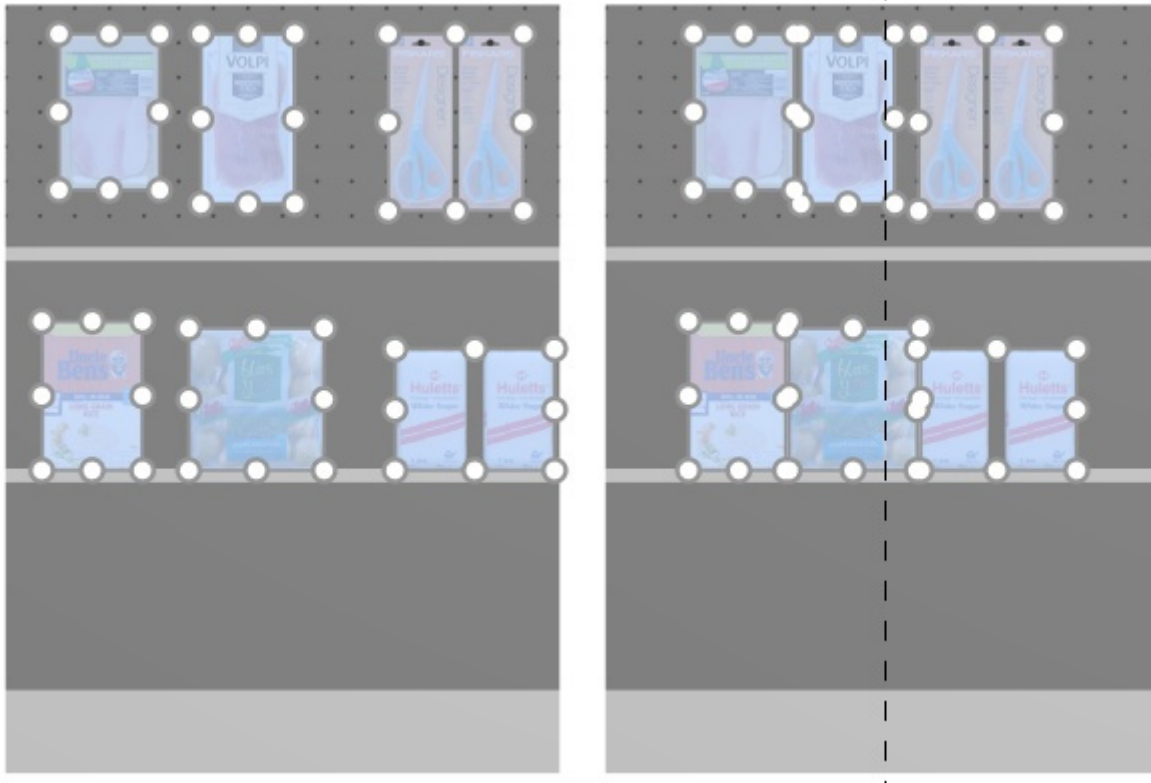


Image on the left: Before spacing

Image on the right: Pack center on shelf (Spacing applies to each facing not checkmarked)

Notes:

- Products which are on pegboards are repositioned to the hole which is closest to obtain equal spacing, so not necessarily resulting in equal spacing.
- You can also apply this command to items placed across several bays if the bays are placed side by side, parallel and not too distant from each other.
- If you have allowed [Allow lateral overhang \(Selected shelves\)](#)/ [Allow lateral overhang \(Selected back panels\)](#) where the selected items are placed, PlanogramBuilder still tries to fit the products within the physical bounds of the shelves / rows. But if the selected products only fit on the shelf / row with an overhang, the minimal possible overhang is applied.

Pack right on shelf (products and accessories)

Group the selected products against the right edge of their respective shelves or rows.

For groups of multiple same products in width with [Width gap](#), the effect varies depending on the setting named [Spacing applies to each facing](#) as illustrated in the examples below.

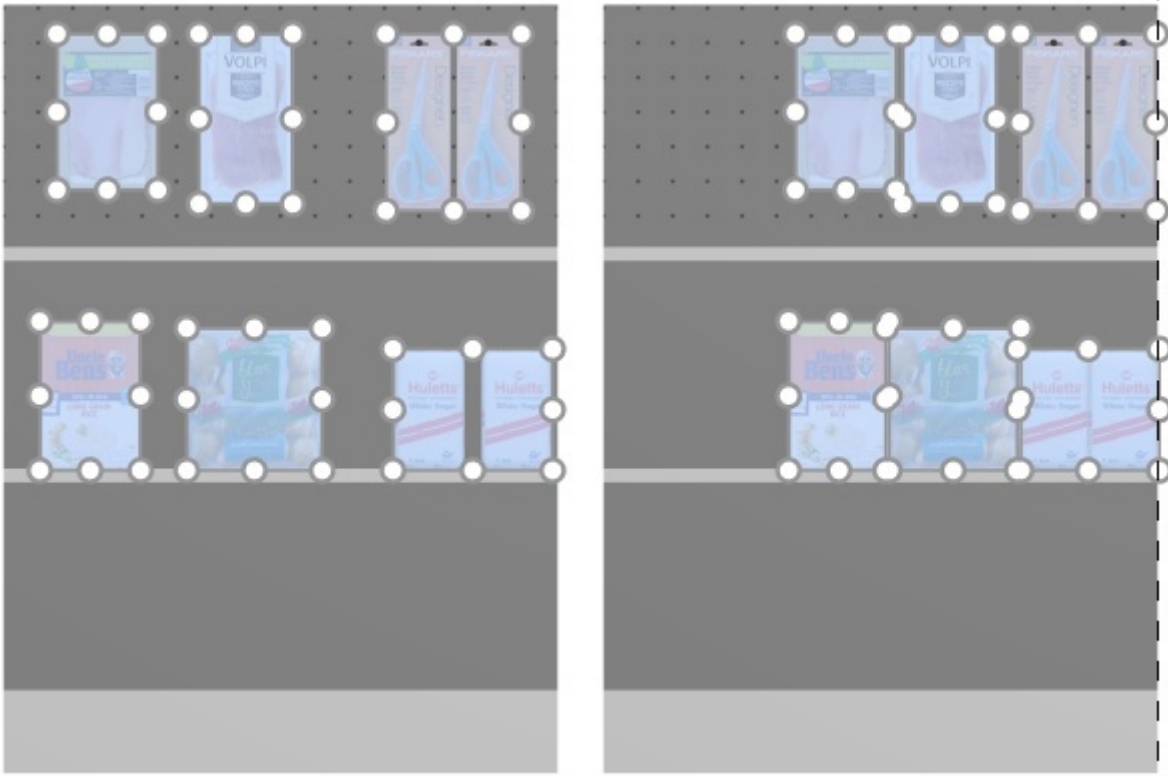


Image on the left: Before spacing

Image on the right: Pack right on shelf (Spacing applies to each facing checkmarked)

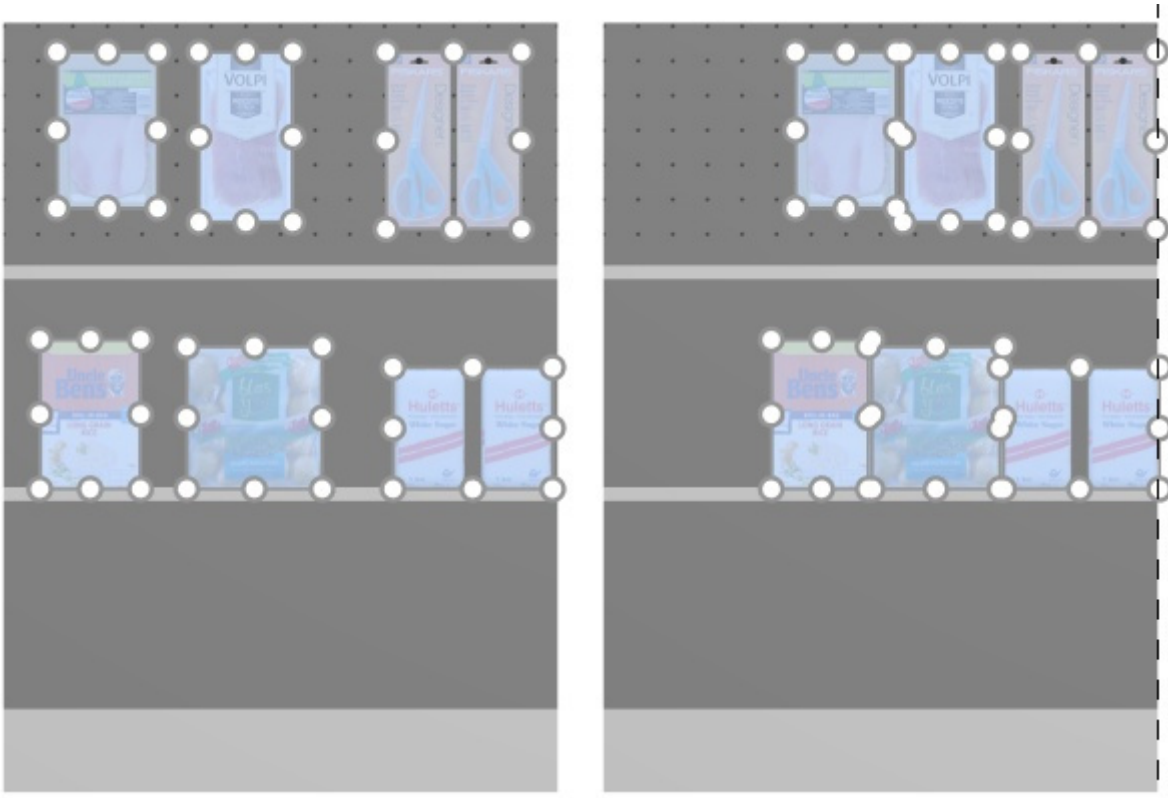


Image on the left: Before spacing

Image on the right: Pack right on shelf (Spacing applies to each facing not checkmarked)

Notes:

- Products which are on pegboards are repositioned to the hole which is closest to obtain equal spacing, so not necessarily resulting in equal spacing.
- You can also apply this command to items placed across several bays if the bays are placed side by side, parallel and not too distant from each other.
- If you have allowed [Allow lateral overhang \(Selected shelves\)](#)/ [Allow lateral overhang \(Selected back panels\)](#) where the selected items are placed, PlanogramBuilder still tries to fit the products within the physical bounds of the shelves / rows. But if the selected products only fit on the shelf / row with an overhang, the minimal possible overhang is applied.

Fill shelf width (products and accessories)

Distribute the selected products with an equal gap between them across the entire width of their respective shelves or rows.

For groups of multiple same products in width with [Width gap](#), the effect varies depending on the setting named [Spacing applies to each facing](#) as illustrated in the examples below.

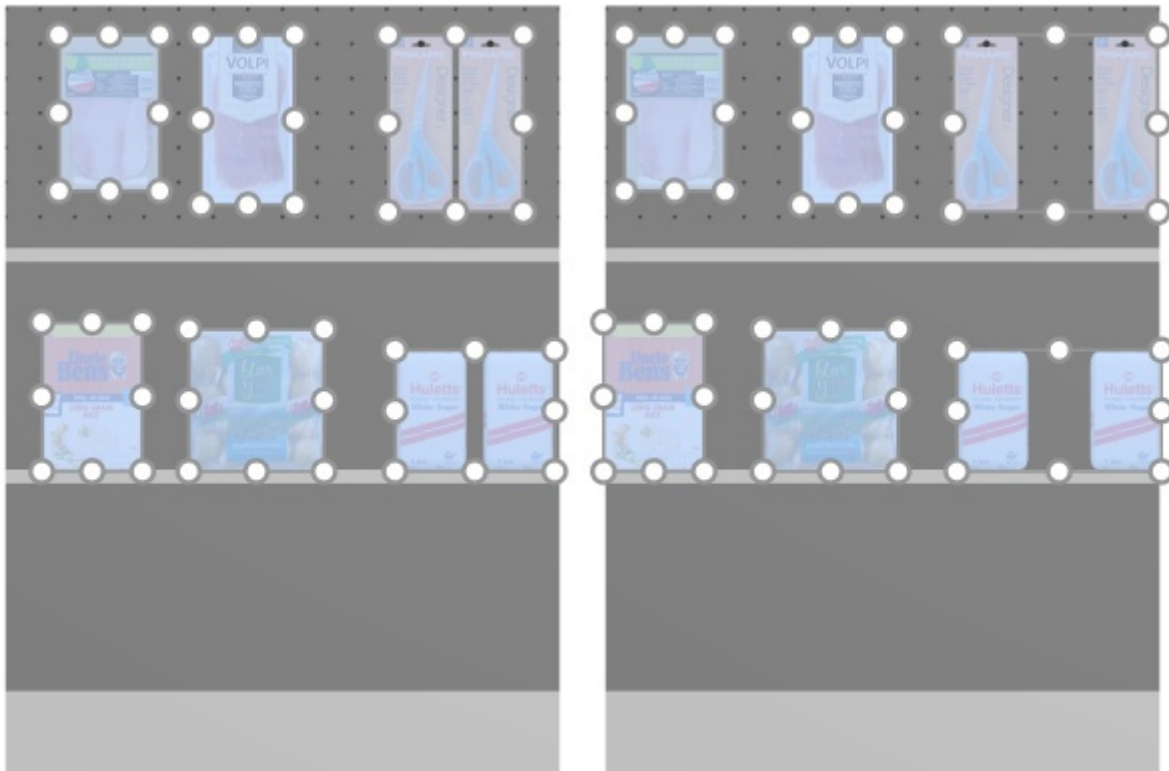


Image on the left: Before spacing

Image on the right: Fill shelf width (Spacing applies to each facing checked)

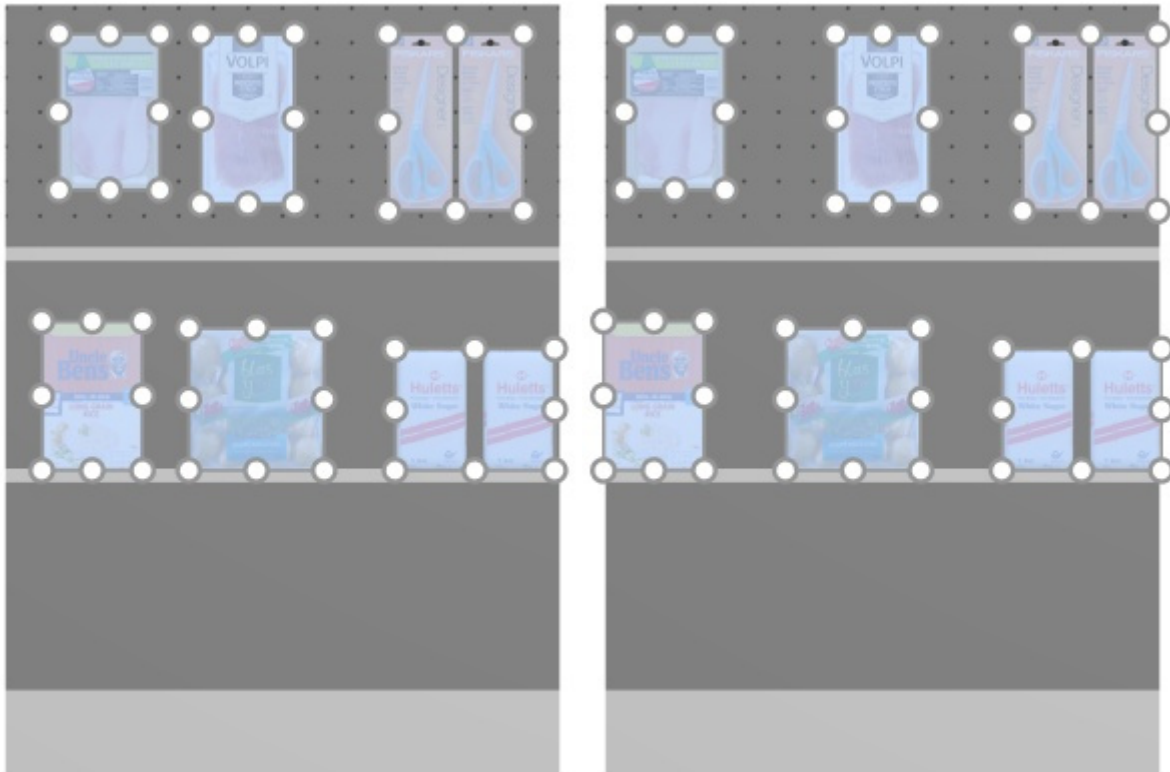


Image on the left: Before spacing

Image on the right: Fill shelf width (Spacing applies to each facing not checkmarked)

Notes:

- Products which are on pegboards are repositioned to the hole which is closest to obtain equal spacing, so not necessarily resulting in equal spacing.
- You can also apply this command to items placed across several bays if the bays are placed side by side, parallel and not too distant from each other.
- If you have allowed [Allow lateral overhang \(Selected shelves\)](#)/ [Allow lateral overhang \(Selected back panels\)](#) where the selected items are placed, PlanogramBuilder still tries to fit the products within the physical bounds of the shelves / rows. But if the selected products only fit on the shelf / row with an overhang, the minimal possible overhang is applied.

Mirror on shelf (products and accessories)

Invert the left-right order of selected products on their respective shelves or rows.

It is convenient for example when you change [Flow direction](#).

For groups of multiple same products in width with [Width gap](#), the effect varies depending on the setting named [Spacing applies to each facing](#) as illustrated in the examples below.

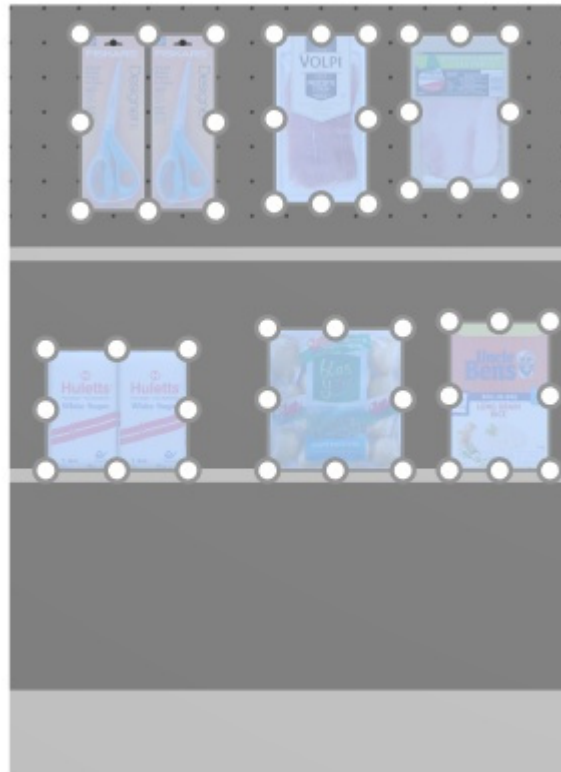
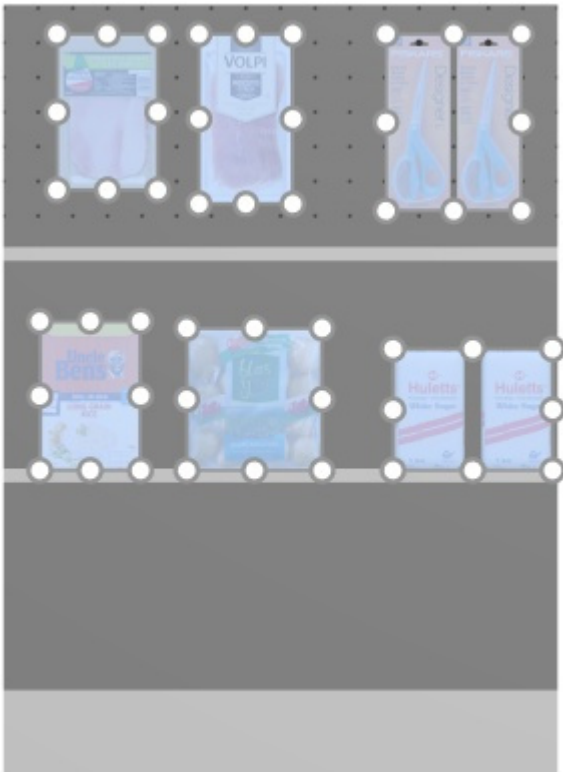


Image on the left: Before spacing

Image on the right: Mirror on shelf (Spacing applies to each facing checkmarked)

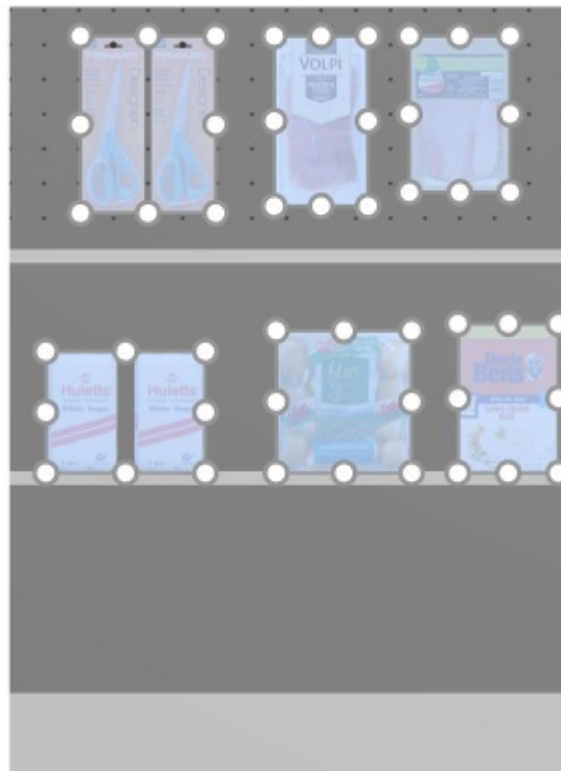
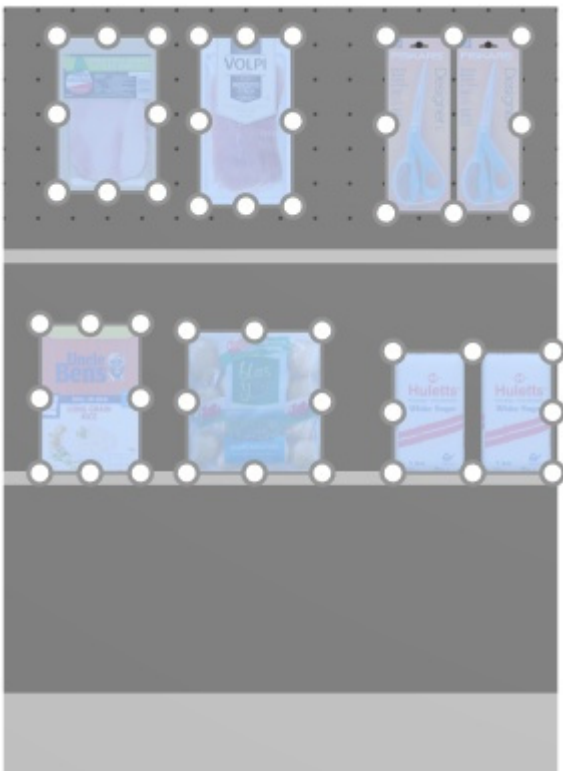


Image on the left: Before spacing

Image on the right: Mirror on shelf (Spacing applies to each facing not checkmarked)

Notes:

- Products which are on pegboards are repositioned to the hole which is closest to obtain equal spacing, so not necessarily resulting in equal spacing.
- You can also apply this command to items placed across several bays if the bays are placed side by side, parallel and not too distant from each other.
- If you have allowed [Allow lateral overhang \(Selected shelves\)](#)/ [Allow lateral overhang \(Selected back panels\)](#) where the selected items are placed, PlanogramBuilder still tries to fit the products within the physical bounds of the shelves / rows. But if the selected products only fit on the shelf / row with an overhang, the minimal possible overhang is applied.

Rotate products

You can rotate selected products by 90-degree increments around the selected axis X, Y or Z.

Instructions:

1. Activate this tool: [Edit products and accessories](#).
2. Select the products to rotate. They become highlighted and a move pointer is displayed.
3. Click on one of the rotation commands on the object editing toolbar or in **Main Menu > Edit > Rotate products**.
4. The selected products have now been rotated.

Example of a rotated product:



Image on the left: Initial orientation

Image on the right: 270-degree Y rotation

The following commands are available:

Tip over to left

Rotate the selected products to the left on the depth axis (X 90° counterclockwise).

Consult [Rotate products](#) for usage instructions.

- Keyboard shortcut: **Left arrow**

Tip over to right

Rotate the selected products to the right on the depth axis (X 90° clockwise).

Consult [Rotate products](#) for usage instructions.

- Keyboard shortcut: **Right arrow**

Tip over forward

Rotate the selected products to the front on the width axis (Y 90° counterclockwise).

Consult [Rotate products](#) for usage instructions.

- Keyboard shortcut: **Down arrow**

Tip over backward

Rotate the selected products to the back on the width axis (Y 90° clockwise).

Consult [Rotate products](#) for usage instructions.

- Keyboard shortcut: **Up arrow**

Rotate right

Rotate the selected products to the right on the vertical axis (Z 90° counterclockwise).

Consult [Rotate products](#) for usage instructions.

Rotate left

Rotate the selected products to the left on the vertical axis (Z 90° clockwise).

Consult [Rotate products](#) for usage instructions.

Turn upside down

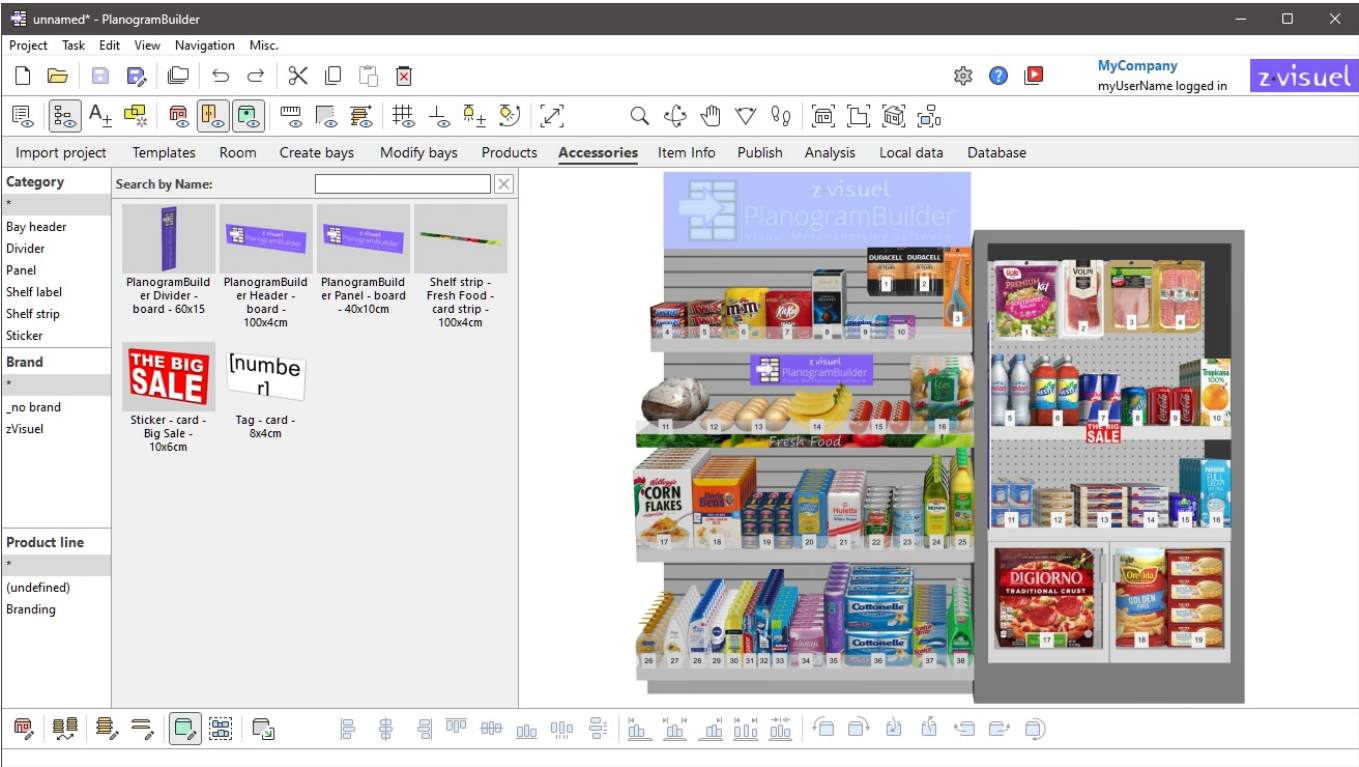
Rotate the selected products by 180° on the depth axis (X 180°): The front face still faces you, but the products are then upside down.

Consult [Rotate products](#) for usage instructions.

- Keyboard shortcut: **U**

Accessories

This task lets you place accessories on shelving in planograms.

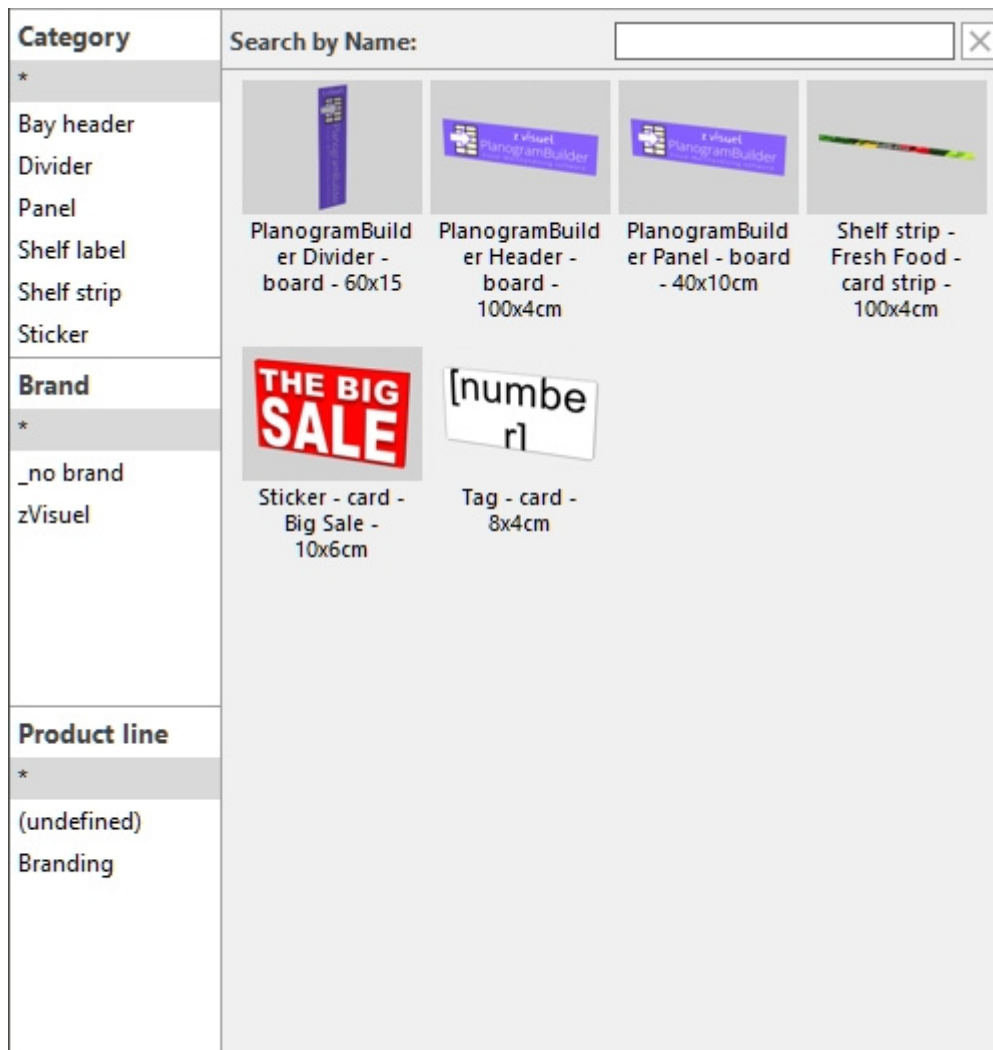


Note: If you are just starting using PlanogramBuilder, some sample items are available as examples. You must then add your own accessories to the database. Consult [Database](#) to find out how to add accessories to the database.

Tip: If you have room elements in your project, you may want to hide them while working with accessories, so the walls are not blocking the view of shelving. Consult [View the room](#).

Catalog of accessories

This pane reflects all the accessories you have in your database. This is where you can select and drag your accessories into your planograms.



Finding items in the catalog of accessories works the same as for products. Consult the following sections for instructions:

- [Classification hierarchy \(Catalog of products\)](#)
- [Search by text \(Catalog of products\)](#)

Thumbnail list (Catalog of accessories)

The right side of the catalog pane displays the list of accessories corresponding to your current [Classification hierarchy \(Catalog of products\)](#) or to your [Search by text \(Catalog of products\)](#).

Each product is represented by a thumbnail and a text description.

By default, the thumbnail caption is the accessory name, but you can also set it to another property, such as Reference or a combination of properties (consult [Captions & Search](#)).

Adding accessories to a planogram

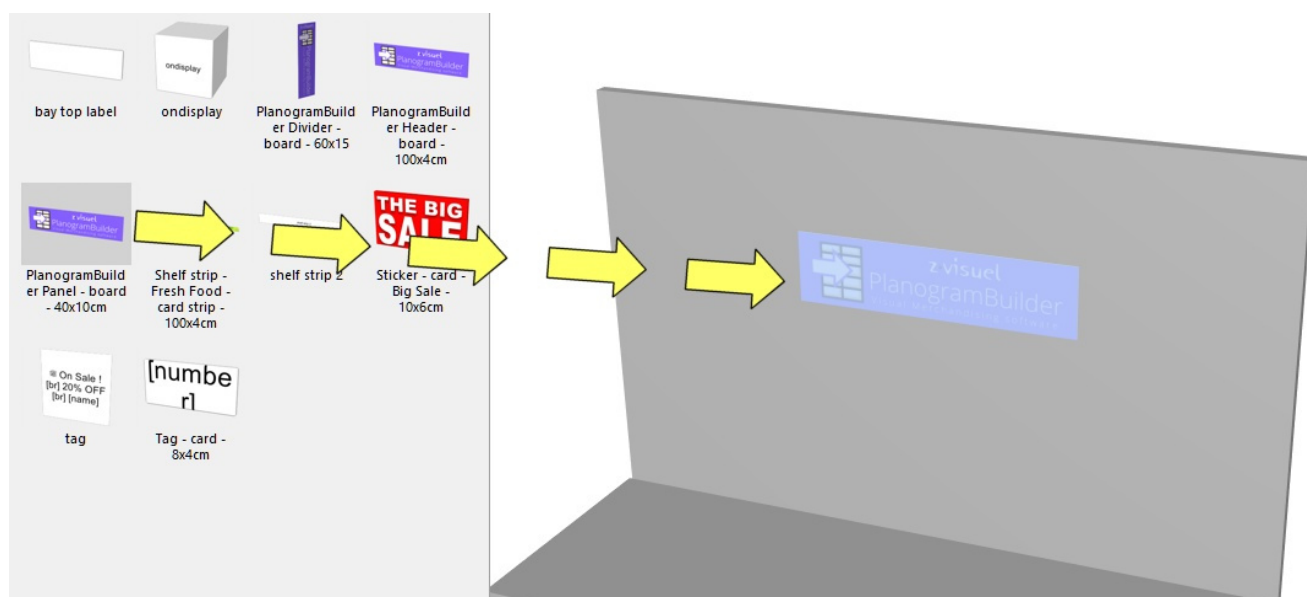
To place an accessory from the catalog into your current planogram:

1. Find the desired accessory in the catalog using the classification or the text filters.
2. **Hold the mouse button down** and **drag** the accessory to the desired location on the bay:

- Accessories with the following behaviors must be dragged onto Shelf: [divider](#), [ondisplay](#), [presenter](#), [Shelf badge](#), [Shelf strip](#), [sticker](#), [tag](#). Consult each behavior description for details on where exactly the accessory can be placed on the shelf.



- Accessories with the following behaviors must be dragged onto Back panel: [bay header](#), [panel](#). Consult each behavior description for details on where exactly the accessory can be placed on the back panel.



3. **Release the mouse button** once you have reached the desired location. The accessory is placed on the bay.
4. Once an accessory has been placed in your planogram, its thumbnail background changes to a lighter color in the catalog, helping you identify the items already used:

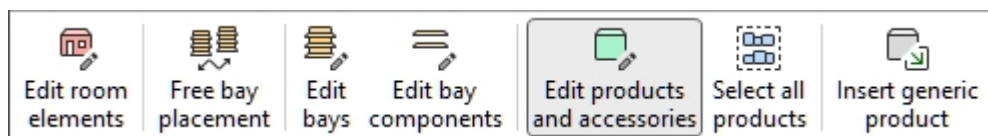


Tips:

- There are times when you may want to temporarily disable collisions to avoid displacing other items while placing an accessory. Hold the **C** key pressed while dragging the item to achieve this. Collisions can also be entirely disabled in [Collisions \(Settings\)](#), or for specific accessories in [Collisions \(Item properties\)](#) in case they must overlap.
- If you have room elements in your project, you may want to hide them while working with products, so the walls are not blocking the view of shelving (consult [View the room](#)).
- Margins have no effect on accessories in [Parameters \(Selected shelves\)](#) and in [Parameters \(Selected back panels\)](#): accessories can always be placed on the whole surface of shelves and back panels.
- [Max. of products on width](#) has no effect on accessories: you can place as many as will fit on the shelves or back panel.

Tools and commands (Accessories)

The object editing toolbar includes several tools and commands to work with accessories in your current planogram:



Some additional commands that also apply to most objects can be found in another toolbar described in [General edit commands](#):

- [Undo \(Edit\)](#)
- [Redo \(Edit\)](#)
- [Cut \(Edit\)](#)
- [Copy \(Edit\)](#)
- [Paste \(Edit\)](#)

- [Delete \(Edit\)](#)

All the tools and commands to work with accessories are also available in [Main Menu](#) > **Edit**:

Undo	Ctrl+Z
Redo	Ctrl+Y
Cut	Ctrl+X
Copy	Ctrl+C
Paste	Ctrl+V
Delete	Delete
Edit room elements	R
Free bay placement	
Edit bays	B
Edit bay components	S
Edit products and accessories	I
Select all products	Ctrl+A
Align and space	>
Rotate products	>
Insert generic product	N
Fit width to bay	

Several tools and commands are the same for accessories and for products. Consult the following sections for instructions:

- [Edit products and accessories](#)
 - [Select \(Edit products and accessories\)](#)
 - [Move \(Edit products and accessories\)](#)
 - [Copy by moving](#)
- [Align and space \(products and accessories\)](#). Note that some of these commands are not available depending on the type of accessories selected. In such cases, the commands are grayed out in the menu.
 - [Align left \(products and accessories\)](#)
 - [Align right \(products and accessories\)](#)
 - [Align top \(products and accessories\)](#)
 - [Align bottom \(products and accessories\)](#)
 - [Space horizontally \(products and accessories\)](#)
 - [Space vertically \(products and accessories\)](#)
 - [Pack left on shelf \(products and accessories\)](#)
 - [Pack center on shelf \(products and accessories\)](#)
 - [Pack right on shelf \(products and accessories\)](#)
 - [Fill shelf width \(products and accessories\)](#)

- [Mirror on shelf \(products and accessories\)](#)

Some features are designed only for products. They are grayed out for accessories:

- Replacing products in a planogram
- Rotate products
- Insert generic product

One command is specific to **accessories** and is described below:

Fit width to bay

This command rescales [bay header](#) and [Shelf strip](#) so that they match the width of the bay.

Instructions:

1. Select the desired accessory as shown in the example below (consult [Select \(Edit products and accessories\)](#)):



2. In **Main Menu** > **Edit**, click on **Fit width to bay**.
3. The selected accessories are now rescaled:

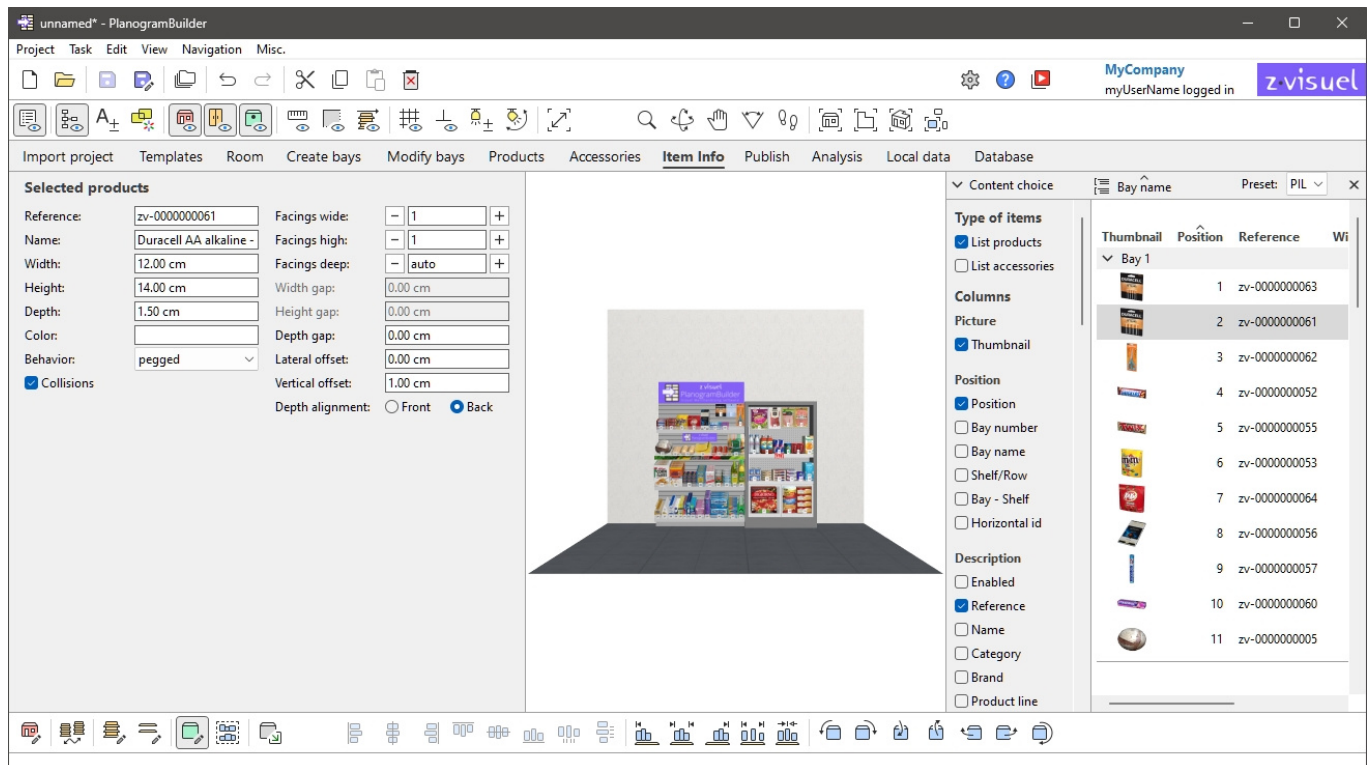


Item Info

In this task, you can view many properties and adjust some parameters for the products and accessories in your current planogram project. Adjustments made in this task only apply to the selected items in the current planogram, but they don't change the source products and accessories in the database.

For example, you can set how many instances of any selected product are placed on a given shelf or change the spacing between products.

This task is also where you define and adjust the base properties of Generic products because these exist only in the current planogram project, not in your database. Consult description in [Insert generic product](#).



Instructions:

1. In your project, [Select \(Edit products and accessories\)](#). Don't mix products and accessories in your selection.
2. Switch to Item Info if not already done.
3. View or adjust the parameters of the selected item.

Tips:

- If multiple items are selected, the values you enter are applied to all selected items in a single operation.
- If you have a door or panel at the front of your shelving, you may not be able to select any products behind the panel. Consult [View front panels](#) for help on hiding these elements.
- If there are some wall or ceilings in your project, you may want to hide them while working with products, so the walls are not blocking the view of shelving. Consult [View the room](#).

Selected products, Selected accessories

Once your item(s) is / are selected, various properties are displayed.

Selected products

Reference:	<input type="text" value="zv-0000000061"/>	Facings wide:	<input type="text" value="1"/>
Name:	<input type="text" value="Duracell AA alkaline -"/>	Facings high:	<input type="text" value="1"/>
Width:	<input type="text" value="12.00 cm"/>	Facings deep:	<input type="text" value="auto"/>
Height:	<input type="text" value="14.00 cm"/>	Width gap:	<input type="text" value="0.00 cm"/>
Depth:	<input type="text" value="1.50 cm"/>	Height gap:	<input type="text" value="0.00 cm"/>
Color:	<input type="text"/>	Depth gap:	<input type="text" value="0.00 cm"/>
Behavior:	<input type="text" value="pegged"/>	Lateral offset:	<input type="text" value="0.00 cm"/>
<input checked="" type="checkbox"/> Collisions		Vertical offset:	<input type="text" value="1.00 cm"/>
		Depth alignment:	<input type="radio"/> Front <input checked="" type="radio"/> Back

Note that the properties displayed in the above-shown pane vary depending on the type of item selected.

Some property values can be adjusted in the current planogram, while some others are read-only and can only be set in the database:

Read-only properties

The properties listed below are read-only. You can still copy the values to the clipboard with **Ctrl+C**.

An exception is Generic products, for which these property values can and must be defined here since these items don't exist in your database. Consult [Insert generic product](#).

Consult their descriptions in Values set in DB only:

- [Reference](#)
- [Name \(Item properties\)](#)
- [Width \(Item properties\)](#)
- [Height \(Item properties\)](#)
- [Depth \(Item properties\)](#)
- [Color \(Item properties\)](#)

Editable properties

The values of the properties listed below are almost always editable.

Changing a value overrides the value set in the database (if any), but only for the selected item(s) in the current project. This is convenient if you need to apply a non-standard value for a particular use case, for example to put a product on a shelf although it was defined as pegged in the database.

The following property values can be predefined in the database ([Values set in DB & changeable in planograms](#)), and can also be set for the selected items in **Item Info**:

- [Behavior](#) (only editable for products, not for accessories)
- [Collisions \(Item properties\)](#)

- [Facings deep](#)
- [Width gap](#)
- [Height gap](#)
- [Depth gap](#)
- [Lateral offset \(Item properties\)](#)
- [Vertical offset](#)
- [Caption](#)

The following property values can only be set in **Item Info** and cannot be predefined in the database:

Facings wide

Only applicable to products.

The number of same products placed adjacently in width on a shelf or peg.

If there are multiple units of the product, they form a block which is treated as one object in PlanogramBuilder.

- Supported values: numeric value [1-150]
- Default value: 1
- Keyboard shortcuts:
 - Decrement the number of Facings wide: **Space + Minus (-) on numpad**
 - Increment the number of Facings wide: **Space + Plus (+) on numpad**
- Example: 3



Example: a product with 3 Facings wide

Tip: you can also set this value interactively with your mouse. Consult [Adjust product quantity](#).

Facings high

The number of same products placed adjacent in height on a shelf or on pegs.

If there are multiple units of the product, they form a block which is treated as one object in PlanogramBuilder.

- Supported values: numeric value [1-150]
- Default value: 1
- Keyboard shortcuts:
 - Decrement the number of Facings high: **Shift + Minus (-) on numpad**
 - Increment the number of Facings high: **Shift + Plus (+) on numpad**
- Example: 2



Example: a product with 2 Facings high

Tip: you can also set this value interactively with your mouse. Consult [Adjust product quantity](#).

Depth alignment

Only applicable to products.

This determines whether products are aligned to the back or to the front of the shelf or peg onto which they are placed.

- Supported values:
 - **Front:** aligns the selected products to the front of the shelf (minus the value of [Front margin](#)) or to the fore tip of the peg (consult [Hook length](#)).
 - **Back:** aligns the selected products to the back of the shelf or peg, typically against the back panel. This is the default value for pegged products

- Default value:
 - For products on shelves: *Front*
 - For products on pegs: *Back*
- Examples: see below



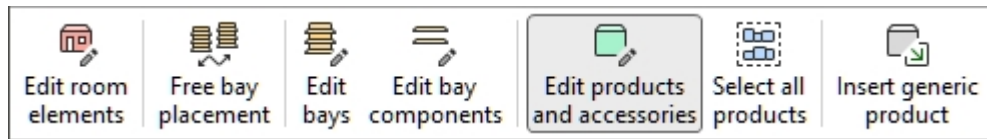
Example of Depth alignment: **Front**



Example of Depth alignment: *Back*

Tools and commands (Item Info)

The object editing toolbar includes several tools and commands to work with products and accessories.



Consult [Tools and commands \(Products\)](#) or [Tools and commands \(Accessories\)](#) depending on what type of object you are editing.

Project item list

This pane displays a list of all the products and accessories in your project. It can be configured to show any kind of [Item properties](#) and several computed value for each item.

The list is also used in [Reports](#) when you publish your planograms for the stores.

You can also use the list to select products and accessories in your project. All selection methods are described in the dedicated section of this guide: [Select \(Edit products and accessories\)](#).

Content choice

Type of items

- List products
- List accessories

Columns

- Picture
 - Thumbnail
- Position
 - Position
 - Bay number

Bay name

				Facings	
Position	Shelf/Row	Reference	Name	Depth	Capacity
Bay 1					
1	1	zv-0000000063	Duracell AAA alkaline - 4p - blister	12	12
2	1	zv-0000000061	Duracell AA alkaline - 4p - blister	10	10
3	1	zv-0000000062	Scissors - Designer 20cm - blister	15	15
4	2	zv-0000000052	Snickers - wrap plastic - 50g	9	27
5	2	zv-0000000055	Twix - wrap plastic - 50g	9	27
6	2	zv-0000000053	M&M's - pouch - 185g	4	4
				422	625

Preset: X

Please refer to Project item list (View) to learn how to toggle the display of Project item list.

Content choice (Project item list)

This menu on the left of the list header bar lets you configure what is displayed in the list, as well as the grouping and highlighting of items.

▼ Content choice

Type of items

☒ List products

☐ List accessories

Columns

Picture

☒ Thumbnail

Position

☒ Position

☐ Bay number

☐ Bay name

☐ Shelf/Row

☐ Bay - Shelf

☐ Horizontal id

Description

☐ Enabled

☒ Reference

To display this pane:

1. Click on the **right-pointing arrow** next to Content choice.
2. The pane is now displayed.

To hide this pane:

1. Click on the **down-pointing arrow** next to Content choice.
2. The panel is now hidden.

Type of items (Project item list)

This section lets you choose which type(s) of items you want displayed in the list.

List products

Toggles the display of products in the list.

- Supported values:
 - Checked*: products are displayed in the list.
 - Not checked*: products are not displayed in the list.
- Default value: *Checked*

List accessories

Toggles the display of accessories in the list.

- Supported values:

- *Checkmarked*: accessories are displayed in the list.
 - *Not checkmarked*: accessories are not displayed in the list.
- Default value: *Not checkmarked*

Columns

This section lets you choose which item properties you want to see listed as columns in the list.

For each property displayed in the list as a column, the value is shown for each product or accessory. Totals per group and per project are also shown when possible for numeric and percentage values.

All the available choices are in the form of checkboxes which toggles the display of the corresponding values in the list.

- Supported values:
 - *Checkmarked*: the corresponding values are displayed in the list.
 - *Not checkmarked*: the corresponding values are not displayed in the list.
- Default values: based on your last choices

Notes:

- if some columns don't fit in the list pane, you can use the horizontal scrollbar to view them.
- Properties which are not available are grayed out in the column choices. For example:
 - **Single item markup** can't be selected if you haven't loaded product pricing ([Price list file](#)).
 - **Project analysis value** can't be selected while [Perform analysis](#) is turned off.
- The columns of grayed-out properties are not displayed in the list, even if the properties have a checkmark in the choice of columns.
- Undefined metrics are displayed with the **N/A** value in the list.
- Metrics based on incomplete data have **(MD)** (missing data) appended to the calculated values in the list.

The following groups of properties and values are available:

Picture

Thumbnail

A thumbnail image of each item in the list. Thumbnails can help identify each product visually in the listing.

The thumbnail size is adjusted based on your choice of [Font height](#), and it uses the same viewpoint as in Catalog of products.

Position

Position

A unique number from 1 to n for each product listed. Numbering is based on each item physical location with the following rules:

- On each bay, numbering is ordered from the left-most product on the highest shelf/row to the right-most product on the lowest shelf/row.
- If items are grouped in the list by [Bay number](#) or by [Bay name](#), item numbering restarts from 1 at each bay (consult [Group by](#)).
- If items are not grouped or grouped by any other property in the list, a unique number is assigned to each item in the project. In this case numbering starts from items on Bay number 1 and ends with those on the last bay number in the planogram.

Tip: To quickly find the position of each product in the visual area or in published images, the *Position* column can be combined with matching number labels on the products in [Schematic view \(View\)](#).

Bay number

A unique number assigned to each bay. Numbering starts from the left-most bay and ends with the right-most bay in the planogram as seen from the front.

Bay name

The name of each bay as defined in [Bay name](#). If no name is defined for a given bay, its name is displayed in the item list as *Bay [Bay number]*, for example *Bay 7*.

Shelf/Row

A number from 1 to n representing on which shelf or row each product is placed.

Notes:

- Numbering starts from the top and ends at the lowest row or shelf of each bay.
- Even empty shelves are numbered.

Bay - Shelf

This provides a more compact version of item position, combining *Bay number* + Shelf/Row. For example, *2 - 5* means the item is on *Bay 1, shelf 5*.

Horizontal id

A number from 1 to n representing the order of each item from left to right on its shelf / row.

Notes:

- All items stacked vertically in a same stack have the same Horizontal id.
- Any product placed several times side by side and with the same values for [Facings deep](#) and [Facings high](#) account for a single horizontal ID. In this case [Facings wide](#) is set to the number of adjacent piles of the item.

Description

[Enabled](#)

[Reference](#)

[A \[A: Classification - level 1\]](#)

[B \[B: Classification - level 2\]](#)

[C \[C: Classification - level 3\]](#)

[Name \(Item properties\)](#)

[Item custom properties \[1 – 12\]](#)

Consult the above links for details.

Dimensions

[Width \(Item properties\)](#)

[Height \(Item properties\)](#)

[Depth \(Item properties\)](#)

Consult the above links for details.

Appearance

[Shape](#)

[Image \(1 – 6\)](#)

[Color \(Item properties\)](#)

Consult the above link for details.

Type (Project item list)

Type

The type of item, either *Product* or *Accessory*, based on the type defined in the database for each item.

[Behavior](#)

Consult the above link for details.

Arrangement

[Depth alignment](#)

[Width gap](#)

[Height gap](#)

[Depth gap](#)

[Lateral offset \(Item properties\)](#)

[Vertical offset](#)

[Collisions \(Item properties\)](#)

Consult the above links for details.

Facings

[Facings wide](#)

[Facings high](#)

[Facings deep](#)

Consult the above links for details.

The totals are computed per block of same products, according to the following rules:

- Adjacent same products part of a same product block (single selectable entity) are grouped on one line with the total quantity for the block.
- Adjacent same products part of separate blocks (multiple entities) are shown on separate lines in the list with the totals per line.

- Different products stacked vertically are listed on distinct lines.

Capacity

The total quantity of each block of products on one line in the list (= [Facings wide](#) × [Facings high](#) × [Facings deep](#)).

Used space

The columns described below let you display the space used by products in your project.

Note: the following values are computed based on the space taken by each product block including the gaps between products if any. For example, a product measuring 10 cm wide × 8 cm high placed twice in width and twice in height, with a gap of 1 cm in width results in this front surface:

$$((10 \text{ cm} \times 2 + 1 \text{ cm}) \times (8 \text{ cm} \times 2)) = 336 \text{ cm}^2$$

Linear space [Measurement unit]

The width used by each block of same products on the shelving.

Values are expressed in the measurement unit selected in [Measurement unit](#).

- For products on shelf: the width of each block of products. (Each row uses the same shelf, so we count only the base row of the stack as using linear space.)

	Width (Item properties) × Facings wide
+	Width gap × (Facings wide -1)
=	Linear space [Measurement unit]

- For pegged products: the width of each block of products × the quantity of products in height. (Each row uses a separate hole on the back panel, so we count each row as using linear space)

	Width (Item properties) × Facings wide
+	Width gap × (Facings wide -1)
=	Sub-total
×	Facings high
=	Linear space [Measurement unit]

Linear space [%]

The width used by each block of same products, expressed in percentage of the total space used by products in the project.

- For products on shelf: the width of each block of products.
- For pegged products: the width of each block of products × the quantity of products in height.

	Linear space [Measurement unit] (current block of products)
/	Linear space [Measurement unit] (current project)
=	Linear space [%]

Front surface [Measurement unit²]

The front area (width × height) used by each block of products.

Values are expressed in the measurement unit selected in [Measurement unit](#).

	Height (Item properties) × Facings high
--	---

+	Height gap (effective gap) × (Facings high -1)
=	Sub-total
×	Linear space [Measurement unit]
=	Front surface [Measurement unit 2]

Front surface [%]

The front area (width × height) used by each block of products, expressed in percentage of the total area used by all products in the project.

	Front surface [Measurement unit 2] (current block of products)
/	Front surface [Measurement unit 2] (current project)
=	Front surface [%]

Volume used [[Measurement unit](#)3]

The volume (width × height × depth) used by each product block.

Values are expressed in the measurement unit selected in [Measurement unit](#).

	Depth (Item properties) × Facings deep
×	Front surface [Measurement unit 2]
=	Volume used [Measurement unit 3]

Volume used [%]

The volume (width × height × depth) used by each product block expressed in percentage of the total volume used by all products in the project.

	Volume used [Measurement unit 3] (current block of products)
/	Volume used [Measurement unit 3] (current project)
=	Volume used [%]

Price

The columns described below let you display pricing information in your list.

Note: these columns require [Price list file](#).

Note: products with missing values display an *N/A* value.

[Buying price](#)

[Retail price \(tax excl.\)](#)

[Retail price \(tax incl.\)](#)

[Sales tax rate](#)

Consult the above links for details.

Single item markup

The difference between buying and selling price before tax.

	Retail price (tax excl.)
-	Buying price
=	Single item markup

Quantities sold

Note: the columns in this section require [Sales figures file](#).

Note: products with missing values display an *N/A* value.

Quantity sold (Project item list)

Consult [Quantity sold \(Sales figures file\)](#).

Analysis (Project item list)

Project analysis value

The current result of Project analysis for each product.

The information in this column depends on your configuration of [Project analysis](#).

Note: products with missing value display an *N/A* value.

Tip: The single value you can choose to display here is based on your current choice of *Project analysis*. However, many of the possible values are also directly available as column choices in Project item list under [Shelf value](#) and [Sales value](#), allowing you to display multiple sales information at the same time.

Shelf value

This section contains values calculated for each product block, based on [Capacity](#). Totals are also displayed when applicable.

Notes:

- The columns in this section require [Price list file](#).
- The columns in this section also display the super header named *Shelf value* above the column header(s).
- Products with missing values in this section display as **N/A**.

Buying value [Currency symbol] (Shelf value)

The buying value by blocks of products, based on their quantity on shelf.

	Buying price
×	Capacity
=	Buying value [Currency symbol] (Shelf value)

Retail value (tax excl.) [Currency symbol] (Shelf value)

The selling value before tax by product, based on their quantity on shelf.

	Retail price (tax excl.)
×	Capacity
=	Retail value (tax excl.) [Currency symbol] (Shelf value)

Retail value (tax incl.) [Currency symbol] (Shelf value)

The selling value with tax by product, based on their quantity on shelf.

	Retail price (tax incl.)
×	Capacity

=	Retail value (tax incl.) [Currency symbol] (Shelf value)
---	--

Markup [Currency symbol] (Shelf value)

The markup value by product, based on their quantity on shelf.

	Single item markup
×	Capacity
=	Markup [Currency symbol] (Shelf value)

Markup percent [Currency symbol] (Shelf value)

The markup percentage by product for all products on shelf.

	Single item markup
/	Buying price
=	Markup percent [Currency symbol] (Shelf value)

Profit margin [Currency symbol] (Shelf value)

The profit percentage by product for all products on shelves.

	Single item markup
/	Retail price (tax excl.)
=	Profit margin [Currency symbol] (Shelf value)

Sales value

This section contains sales values calculated for each product, based on [Quantity sold \(Sales figures file\)](#). Totals are also displayed when applicable.

Notes:

- The columns in this section require [Price list file](#) and [Sales figures file](#).
- The columns in this section also display the super header named Sales value above the column header(s).
- Products with missing values in this section display as **N/A**.

Buying value [Currency symbol] (Sales value)

The buying value by product, based on the quantity sold.

	Buying price
×	Quantity sold (Sales figures file)
=	Buying value [Currency symbol] (Sales value)

Retail value (tax excl.) [Currency symbol] (Sales value)

The selling value before tax by product, based on the quantity sold.

	Retail price (tax excl.)
×	Quantity sold (Sales figures file)
=	Retail value (tax excl.) [Currency symbol] (Sales value)

Retail value (tax incl.) [Currency symbol] (Sales value)

The selling value with tax by product, based on the quantity sold.

	Retail price (tax incl.)
×	Quantity sold (Sales figures file)
=	Retail value (tax incl.) [Currency symbol] (Sales value)

Markup [Currency symbol] (Sales value)

The markup value by product, based on the quantity sold.

	Single item markup
×	Quantity sold (Sales figures file)
=	Markup [Currency symbol] (Sales value)

Markup percent [Currency symbol] (Sales value)

The markup percentage by product. Products with no sales in Quantity sold (Sales figures file) display a value of **N/A**.

	Single item markup
/	Buying price
=	Markup percent [Currency symbol] (Shelf value)t

Profit margin [Currency symbol] (Sales value)

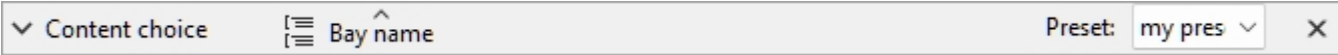
The profit percentage by product. Products with no sales in Quantity sold (Sales figures file) display a value of **N/A**.

	Single item markup
/	Retail price (tax excl.)
=	Profit margin [Currency symbol] (Shelf value)

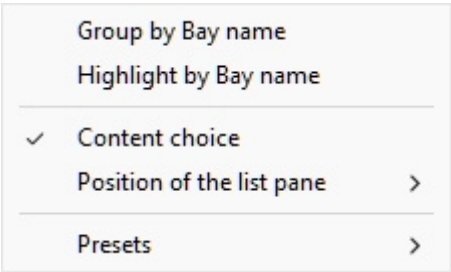
Tools and commands (Project item list)

There are many options to change the way the list and its content is displayed.

This is done from the list toolbar, from the list context menu, and directly from within the list.



Project item list: toolbar



Project item list: context menu

Notes:

- The menu item named Content choice is not described in the section below. Consult the dedicated section in this guide: [Content choice \(Project item list\)](#).
- The list can be used as a tool to select products and accessories in your project. This and other selection methods are described in the dedicated section of this guide: [Select \(Edit products and accessories\)](#).

Formatting (Project item list)

Group by

You can group items in the list by any available item property.

When using groups, sub-totals per group are also displayed for applicable columns (percentages and numeric values).

To group items in the list:

1. Open [Content choice \(Project item list\)](#)
2. Under [Columns](#), right-click on the property name by which you want to group items. For example, right-click on [Bay number](#).
3. A context menu is displayed.
4. Select **Group by Bay number**.
5. The list of items is now grouped by *Bay number*. An icon is also displayed in the list header bar showing the current grouping property.

Examples:

- The screenshot in [Project item list](#) shows the list grouped by *Bay name*.
- The screenshot in [Highlight by Category](#) shows the list grouped by *Category*.

Note: if you group items by *Bay name* or by *Bay number*, [Position](#) count re-starts at 1 for each group.

To ungroup items in the list:

1. Right-click anywhere within the list pane to show its context menu.
2. Select **Group by (None)**.

To expand / collapse a group in the list:

1. Click on the right-pointing / down-pointing arrow next to the group name in the list.

Expand all groups / Collapse all groups

To expand / collapse all groups in the list:

1. Right-click anywhere within the list pane to show its context menu.
2. Click on respectively [Expand all groups / Collapse all groups](#).

Highlight by

You can highlight items in the list and in the visualization area by any available item property and several calculated values, for example space usage per product in your project.

Highlights are applied onto items in the following way:

- For textual values (ex: [Highlight by Category](#)):

- A distinct color is applied to each distinct value. This gives a visual indicator of which value items have.
- For Boolean values (ex: [Highlight by Enabled](#)):
 - A red color is applied to items which values for the selected property are not checkmarked (No).
 - A green color is applied to items which values for the selected property are checkmarked (Yes).
- For numeric and percentage values (ex: [Highlight by Linear space \[%\]](#), or [Project analysis value](#)):
 - A color from a range between red and green is allocated to each item based on its value relative to the minimum and maximum item values found in your planogram. In this case, the applied colored range also appears at the top of the visualization area as a colored horizontal bar with sample values as a legend. Highlighting items per measurable properties or calculated values gives you a visual performance indicator.

Instructions:

1. Open [Content choice \(Project item list\)](#)
2. Under [Columns](#), right-click on the property name by which you want to highlight items. For example, right-click on **Category**.
3. A context menu is displayed.
4. Select **Highlight by Category**.
5. The list of items and the items in the visual area are now highlighted by *Category*: a color is assigned to each category. An icon is also displayed in the list header bar showing the current highlighted property.

To un-highlight items:

1. Right-click anywhere within the list pane to show its context menu.
2. Select **Highlight by (None)**.

Note: highlighting is not applied if the chosen property is not available (grayed out) in the column choices. For example:

- No highlights shown by [Buying price](#) if you haven't loaded [Sales figures file](#).
- No highlights shown by [Project analysis value](#) when [Perform analysis](#) is not checkmarked.

Examples:

Highlight by Category

Items are highlighted with colors based on their category.

Content choice

Category

Category

Preset: category

Type of items

☒ List products
 ☐ List accessories

Columns

Picture

☐ Thumbnail

Position

☒ Position
 ☐ Bay number
 ☒ Bay name
 ☒ Shelf/Row
 ☐ Bay - Shelf
 ☒ Horizontal id

Description

☐ Enabled
 ☐ Reference
 ☒ Name
 ☒ Category
 ☐ Brand
 ☐ Product line

Dimensions

☐ Width [cm]
 ☐ Height [cm]
 ☐ Depth [cm]

Appearance

☐ Shape
 ☐ Image1

Position

Bay name

Shelf/Row

Horizontal id

Name

Category

Beverage

5	Bay 1	2	1	Evian - bottle PET - 500ml	Beverage
6	Bay 1	2	2	Nestea Lemon - bottle PET - 500ml	Beverage
7	Bay 1	2	3	Red Bull - can - 355ml	Beverage
8	Bay 1	2	4	Sprite - can - 330ml	Beverage
9	Bay 1	2	5	Coca-Cola - can - 330ml	Beverage
10	Bay 1	2	6	Juice - orange - carton - 1l	Beverage

Dairy

11	Bay 1	3	1	Yoghurt - vanilla - cup - 80g	Dairy
12	Bay 1	3	2	Brie - wrap plastic - 200g	Dairy
13	Bay 1	3	3	Gruyère - wrap plastic - 170g	Dairy
14	Bay 1	3	4	Butter - wrap alu - 200g	Dairy
15	Bay 1	3	5	Cream - whipping - carton - 200ml	Dairy
16	Bay 1	3	6	Milk 3.5% - carton - 1l	Dairy

Frozen Food

17	Bay 1	4	1	Pizza - supreme - carton - 283g	Frozen Food
18	Bay 1	4	2	French Fries - golden - pouch - 907g	Frozen Food
19	Bay 1	4	3	Ice cream - vanilla - tub - 1kg	Frozen Food

Meat

2	Bay 1	1	2	Prosciutto - sliced - blister - 85g	Meat
3	Bay 1	1	3	Ham - sliced - blister - 100g	Meat
4	Bay 1	1	4	Salami - sliced - blister - 100g	Meat

Produce

1	Bay 1	1	1	Salad - green mix - blister - 350g	Produce
---	-------	---	---	------------------------------------	---------

Products highlighted by category in Project item list



Products highlighted by category in Visualization area

Highlight by Enabled

Items are highlighted in red or in green depending on the status of the property named [Enabled](#) in your database.

Explanation: products and accessories can be disabled in the database, so they aren't displayed in the catalog. However, if you open a project which contains disabled items, these are loaded and display on your bays because they still exist in the database.

Highlighting these items in red helps you quickly identify them in your current project.

Content choice

Type of items

List products

List accessories

Columns

Picture

Thumbnail

Position

Position

Bay number

Bay name

Shelf/Row

Bay - Shelf

Horizontal id

Description

Enabled

Reference

Name

Category

Brand

Product line

Dimensions

Width [cm]

Height [cm]

Depth [cm]

Appearance

Shape

Image1

Bay name

Enabled

Preset: enabled

Position

Shelf/Row

Horizontal id

Enabled

Name

Bay 1

1

1

1

Yes

Salad - green mix - blister - 350g

2

1

2

Yes

Prosciutto - sliced - blister - 85g

3

1

3

Yes

Ham - sliced - blister - 100g

4

1

4

Yes

Salami - sliced - blister - 100g

5

2

1

Yes

Evian - bottle PET - 500ml

6

2

2

No

Nestea Lemon - bottle PET - 500ml

7

2

3

Yes

Red Bull - can - 355ml

8

2

4

Yes

Sprite - can - 330ml

9

2

5

Yes

Coca-Cola - can - 330ml

10

2

6

Yes

Juice - orange - carton - 1l

11

3

1

Yes

Yoghurt - vanilla - cup - 80g

12

3

2

Yes

Brie - wrap plastic - 200g

13

3

3

Yes

Gruyère - wrap plastic - 170g

14

3

4

Yes

Butter - wrap alu - 200g

15

3

5

No

Cream - whipping - carton - 200ml

16

3

6

Yes

Milk 3.5% - carton - 1l

17

4

1

Yes

Pizza - supreme - carton - 283g

18

4

2

Yes

French Fries - golden - pouch - 907g

19

4

3

Yes

Ice cream - vanilla - tub - 1kg

Products highlighted by Enabled in Project item list



Products highlighted by Enabled in Visualization area

Note: If you disable items in the database while they are in the currently opened project, the disabled items will only be highlighted after reloading the project.

Highlight by Linear space [%]

Items are highlighted in red or in green depending on the calculated [Linear space \[%\]](#) per product in the opened project.

The color range helps you quickly visualize the space used by each product.

Content choice	Category	Linear space [%]	Preset: linear space	
Type of items <input checked="" type="checkbox"/> List products <input type="checkbox"/> List accessories Columns Picture <input type="checkbox"/> Thumbnail Position <input checked="" type="checkbox"/> Position <input type="checkbox"/> Bay number <input checked="" type="checkbox"/> Bay name <input checked="" type="checkbox"/> Shelf/Row <input type="checkbox"/> Bay - Shelf <input checked="" type="checkbox"/> Horizontal id Description <input type="checkbox"/> Enabled <input type="checkbox"/> Reference <input checked="" type="checkbox"/> Name <input type="checkbox"/> Category <input type="checkbox"/> Brand <input type="checkbox"/> Product line Dimensions <input type="checkbox"/> Width [cm] <input type="checkbox"/> Height [cm] <input type="checkbox"/> Depth [cm] Appearance <input type="checkbox"/> Shape <input type="checkbox"/> Image1	Position Bay name Shelf/Row Horizontal id Name Linear space [%]	Beverage 5 Bay 1 2 1 Evian - bottle PET - 500ml 5.08% 6 Bay 1 2 2 Nestea Lemon - bottle PET - 500ml 5.16% 7 Bay 1 2 3 Red Bull - can - 355ml 4.53% 8 Bay 1 2 4 Sprite - can - 330ml 2.62% 9 Bay 1 2 5 Coca-Cola - can - 330ml 5.24% 10 Bay 1 2 6 Juice - orange - carton - 1l 3.52% 26.14% Dairy 11 Bay 1 3 1 Yoghurt - vanilla - cup - 80g 5.47% 12 Bay 1 3 2 Brie - wrap plastic - 200g 4.30% 13 Bay 1 3 3 Gruyère - wrap plastic - 170g 5.47% 14 Bay 1 3 4 Butter - wrap alu - 200g 4.30% 15 Bay 1 3 5 Cream - whipping - carton - 200ml 2.74% 16 Bay 1 3 6 Milk 3.5% - carton - 1l 3.52% 25.79% Frozen Food 17 Bay 1 4 1 Pizza - supreme - carton - 283g 10.94% 18 Bay 1 4 2 French Fries - golden - pouch - 907g 6.25% 19 Bay 1 4 3 Ice cream - vanilla - tub - 1kg 7.03% 24.23% Meat 2 Bay 1 1 2 Prosciutto - sliced - blister - 85g 5.08% 3 Bay 1 1 3 Ham - sliced - blister - 100g 5.47% 4 Bay 1 1 4 Salami - sliced - blister - 100g 5.47% 16.02% Produce 1 Bay 1 1 1 Salad - green mix - blister - 350g 7.82% 7.82% 100.00%		

Products highlighted by Linear space [%] in Project item list



Products highlighted by Enabled in Visualization area

Item sort order

To sort the items in the list according to a desired column content:

1. Click on the desired column header in the list of items, for example **Position**.
2. Click again to invert the sort order.

To sort the list groups (if any) in the desired order:

1. Click on the group header next to the group icon, for example **Bay number**.
2. Click again to invert the sort order.

Column order

To re-arrange the order of columns in the list:

1. drag any column header left or right to the desired position.

Presets

This feature lets you save and apply multiple preferred parameters for the list. This is very useful to quickly switch between various types of lists to display on screen or to include in reports.

The following list parameters are stored in the presets:

- [Type of items \(Project item list\)](#)
- [Columns](#)
- [Group by](#)
- [Highlight by](#)
- [Item sort order](#)
- [Column order](#)

Create a preset

To save the current list configuration as a preset:

1. Right-click anywhere within the list pane to show its context menu.
2. Move your mouse cursor over **Presets** in the menu.
3. Click on **Save as...**
4. In the list toolbar, next to **Preset:**, type the desired name for the current list configuration.
5. Click on **Save**.
6. The current list configuration is now saved and available for re-use.

Apply a preset

To apply a previously saved preset:

1. In the list toolbar, next to **Preset:**, click on the preset list to expand it.
2. Select the desired preset to apply it.

Delete a preset

To delete a previously saved preset:

1. In the list toolbar, next to **Preset:**, click on the preset list to expand it.
2. Select the preset you want to delete.
3. Right-click anywhere within the project item list.
4. A context menu is displayed.
5. Move your mouse cursor over **Presets** in the menu.
6. Click on **Delete** to delete the current preset.

Layout of the pane of the list

You can move and resize the entire pane of Project item list.

Position of the list pane

To move the pane to a different location on screen:

1. Right-click anywhere within the Project Item List panel to show its context menu.
2. Move your mouse cursor on **Position**
3. Click on **Left, Right, Top** or **Bottom**.
4. The Project Item List is now placed in the selected location.

Size of the pane of the list

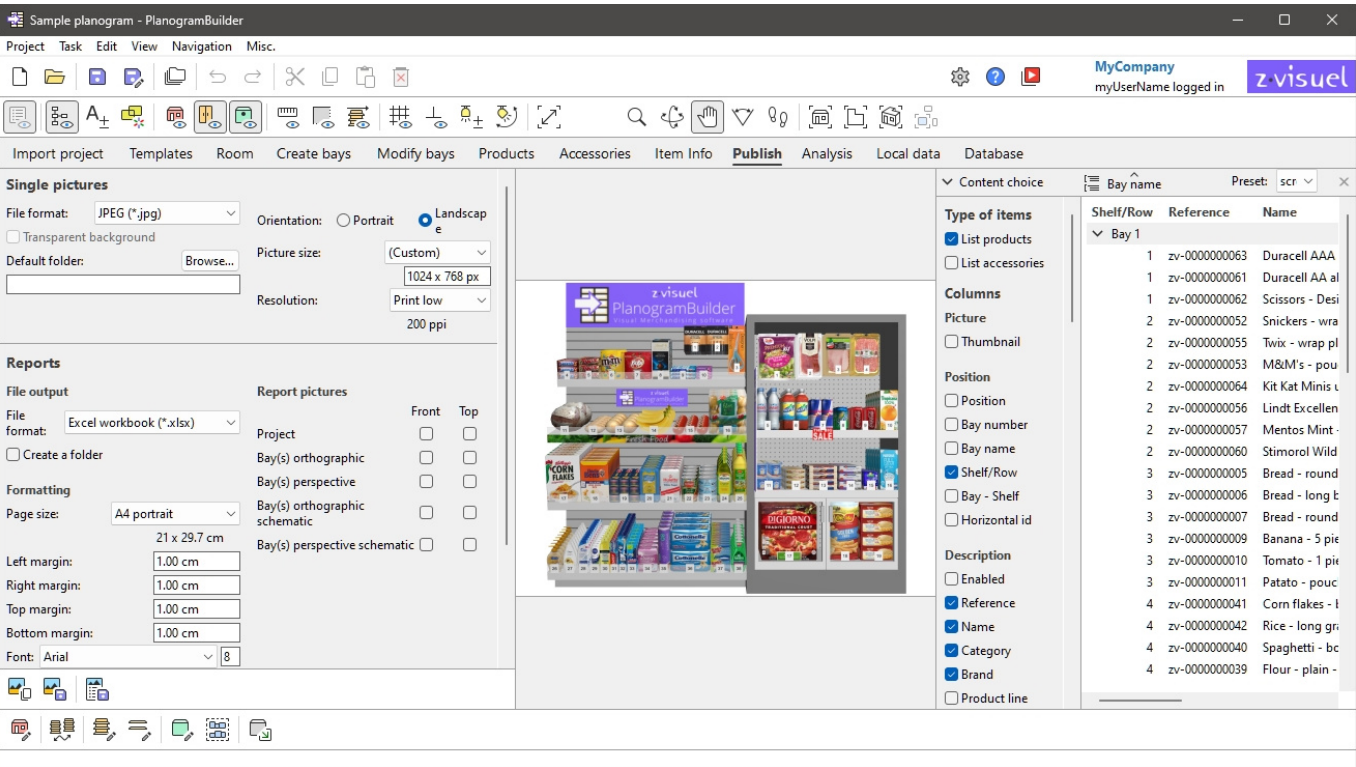
To resize the pane on the screen:

1. Place the mouse cursor on the separation line between the list pane and the visualization area. The cursor turns into a double-ended arrow.
2. Drag the separation line to the desired location on screen.
3. The pane is now resized.

Note: if some columns don't fit in the list pane, you can use the horizontal scrollbar to view them.

Publish

The Publish task lets you create images and reports of your planogram projects so you can communicate your guidelines to the persons in charge of setting-up the products in the stores.



Single pictures

This feature is useful to create simple and quick images of your planogram from any viewpoints. Images created with this method reflect exactly what you see in the visualization area except for the grid which is never shown in output pictures (consult [View grid](#)).



Example of Single pictures

Parameters (Single pictures)

In this pane, you can configure images of your planogram to output for external use.

Single pictures

File format: Orientation: ☐ Portrait ☒ Landscape

☐ Transparent background

Default folder: Picture size:

Resolution:

Note: once the image is configured, use one of the dedicated commands to output it ([Copy picture](#), [Save picture](#)). Images can be placed in the Windows clipboard or saved to a variety of image file formats.

Tip: If you rather want to publish your planogram as a report including a product list and images, please use the dedicated feature: [Reports](#).

File format (Single pictures)

The file format to save the images.

- Supported values:
 - **JPEG (*.jpg):** (Joint Photographic Experts Group). Lossy compression but small file size. Recommended for most images because of its good size-quality ratio.
 - **PNG (*.png):** (Portable Network Graphics). Lossless compression, higher quality but bigger size than JPG. Recommended for printing or if [Transparent background](#) is required.
 - **GIF (*.gif):** (Graphics Interchange Format). Lossless compression, but only 256 colors maximum. Not recommended unless your target application doesn't support other formats.
 - **TIFF (*.tif):** (Tagged Image Format). Lossless LZW compression, similar size to PNG. Suitable for print, but cannot be displayed directly in a web browser.
 - **24-bit Bitmap (*.bmp):** (Device-independent bitmap). No compression, same quality but bigger size than PNG. Not recommended unless your target application doesn't support other formats.
- Default value: **JPEG (*.jpg)**

Transparent background

Note: only available with **PNG** and **TIFF** ([File format](#)).

Toggles the transparent background for saved images.

- Supported values:
 - *Checked:* the image background is transparent. This is convenient if you wish to overlay your planogram image on your choice of background in another document.
 - *Not checked:* the images background is not transparent. It reflects what is defined in [Background color](#), or [Background picture](#) if any.
- Default value: *Not checked*

Note: Pictures copied to the clipboard with [Copy picture](#) cannot have a transparent background. Use [Save picture](#) instead if you want a transparent background.

Default folder

The folder on your computer where images will be saved by default.

- Supported value: folder path expressed with Windows syntax.
- Default value: empty (= none)
- Example: **C:\PlanogramBuilder\planogram_images**

Instructions:

1. Click on **Browse**.
2. Select the desired folder on your PC.
3. Click on **OK**.
4. The path is now listed in the text box.

Note: As an alternative to browsing to the desired folder, you can type the path directly in the text box.

To reset the default folder to empty, click on the small **red cross** button.

Orientation (Single pictures)

The image orientation.

- Supported values:
 - **Portrait:** the image height is bigger than its width.
 - **Landscape:** the image width is bigger than its height.
- Default value: **Landscape**

Note: this setting is correlated with [Picture size](#) as explained in that section.

Picture size

A list of predefined values defining the dimensions of the images to save. This list includes common formats in pixels or in printing sizes.

- Supported values:
 - **A3**
 - **A4**
 - **A5**
 - **Ledger/tabloid**
 - **Legal**
 - **Letter**
 - Various common image sizes in your choice of [Measurement unit](#).
 - Various common image sizes in pixels.
 - **Custom:** if you don't find a suitable preset value, choose this and set your own width and height values in the text box which appears below. Enter values as follows: *width x height unit (cm / mm / m / in / px)*. Use the letter "x" to specify the multiplication symbol. If no unit type is entered, it defaults to your current choice of [Measurement unit](#) as set in the application settings.
- Default value: *Custom: 1024 x 768 px*
- Example: *12 x 24 cm*

Notes:

- The size specified here doesn't define the orientation of the image, which must be solely chosen in [Orientation \(Single pictures\)](#). For example, selecting **1920 x 1080 px** only determines the dimension. You must also select **Portrait** in **Orientation (Single pictures)** if you want the image to be in effect **1080 x 1920 px**.
- When you change the picture size and orientation, the aspect ratio of [Visualization area](#) is automatically adjusted to match the proportions of your final picture. This is handy to preview and fine-tune the framing of your images (using tools in [Navigation](#)).
- Image dimensions are maximum 10000 pixels in width and 10000 pixels in height, either based on the values entered directly in pixels, or on the pixels resulting from print size and resolution. Values resulting in higher pixel width or height are clamped down to the maximum allowed values. Typical use for images of large dimension includes booklets with prepress quality or big size posters that you can use on tradeshow.

Resolution (Single pictures)

The number of pixels per inch (*PPI*) in the image. You can use presets or a custom value.

- If you have set [Picture size](#) in *cm*, *m*, *inch* or *mm*, the *PPI* determines how many pixels the image will contain. E.g., a width of 10 in × 200 PPI = 2000 pixels in the image width.
- If you have set **Picture size** in *px* (pixels), the *PPI* determines the printing size. E.g., a width of 1500 px / 300 PPI = 5 inches (12.7 cm) wide for the image.

This value basically defines the density of pixels when the image is printed or placed in other documents such as word processors and spreadsheets:

- Supported values:
 - Screen: (96 ppi). This corresponds to the Windows system ppi with a screen scaling at 100%. Suitable for images that are displayed on low-dpi screens that won't be zoomed in.
 - Print low: (200 ppi). Suitable for low quality printing or onscreen images.
 - Print medium: (300 ppi). Recommended for images that will be printed.
 - Print high: (600 ppi). Recommended for images that you want to print in high-resolution.
 - Custom: you can specify any values up to 1000 ppi. Note that you don't have to enter *ppi* after the value.

Notes:


- Image dimensions are maximum 10000 pixels in width and 10000 pixels in height, either based on the values entered directly in pixels, or on the pixels resulting from print size and resolution. Values resulting in higher pixel width or height are clamped down to the maximum allowed values. Typical use for images of large dimension includes booklets with prepress quality or posters that you can use on tradeshow.
- When [View dimensions](#) is activated, your output images dimension text and arrows are adjusted automatically to result in a text height of 3 mm in your printed images, based on [Picture size](#) and resolution.

Reports

You can publish your planograms as detailed reports which include the list of items in your project as well as optional predefined image(s) of the planogram.

Reports can be saved in common file formats such as PDF and are well suited for printing and transmitting your planogramming guidelines for implementation.

sample planogram - Bay 1 - orthographic schematic front



Bay 1

sample planogram - Bay 1 - item list

Thumbnail	Position	Shelf/Row Reference	Name	Facings	
				Width	Height
	1	1 zv-0000000025	Salad - green mix - blister - 350g	1	1
	2	1 zv-0000000024	Prosciutto - sliced - blister - 85g	1	1
	3	1 zv-0000000017	Ham - sliced - blister - 100g	1	1
	4	1 zv-0000000018	Salami - sliced - blister - 100g	1	1
	5	2 zv-0000000004	Evian - bottle PET - 500ml	2	1
	6	2 zv-0000000003	Nestea Lemon - bottle PET - 500ml	2	1
	7	2 zv-0000000027	Red Bull - can - 355ml	2	1
	8	2 zv-0000000002	Sprite - can - 330ml	1	1
	9	2 zv-0000000001	Coca-Cola - can - 330ml	2	1
	10	2 zv-0000000026	Juice - orange - carton - 1l	1	1
	11	3 zv-0000000013	Yoghurt - vanilla - cup - 80g	2	2
	12	3 zv-0000000022	Brie - wrap plastic - 200g	1	4
	13	3 zv-0000000021	Gruyère - wrap plastic - 170g	1	4
	14	3 zv-0000000012	Butter - wrap alu - 200g	1	3
	15	3 zv-0000000023	Cream - whipping - carton - 200ml	1	1
	16	3 zv-0000000008	Milk 3.5% - carton - 1l	1	1
	17	4 zv-0000000028	Pizza - supreme - carton - 283g	1	1
	18	4 zv-0000000029	French Fries - golden - pouch - 907g	1	1
	19	4 zv-0000000030	Ice cream - vanilla - tub - 1kg	1	4
				24	31

Example of Reports

In this pane, you can configure your reports for output.

Reports

File output

File format:

Excel workbook (*.xlsx)

☐ Create a folder

Formatting

Page size:

A4 portrait

21 x 29.7 cm

Left margin:

1.00 cm

Right margin:

1.00 cm

Top margin:

1.00 cm

Bottom margin:

1.00 cm

Font:

Arial

8

Text color:
Background color:
Border color:

Resolution:

Print low

200 ppi

☐ One sheet per bay

Report pictures

	Front	Top
Project	<input type="checkbox"/>	<input type="checkbox"/>
Bay(s) orthographic	<input type="checkbox"/>	<input type="checkbox"/>
Bay(s) perspective	<input type="checkbox"/>	<input type="checkbox"/>
Bay(s) orthographic schematic	<input type="checkbox"/>	<input type="checkbox"/>
Bay(s) perspective schematic	<input type="checkbox"/>	<input type="checkbox"/>

Note: Once the report is configured, use the dedicated command to save it ([Report](#)).

File output

Under this section, you can configure file output for reports.

File format (Reports)

The file format to save the report.

- Supported values:
 - HTML (*.html):** (Hypertext Markup Language). A file with separate image files in jpeg format (planogram pictures and item thumbnails). Choose this format to:
 - Publish the report and images "as is" directly on an Intranet or Internet web site.
 - Open in Microsoft ® Word for further editing and printing. Once opened in Word, you can also save as PDF, DOC or DOCX documents, which regroups the otherwise separate listing and images of the report in one single file.
 - Excel workbook (*.xlsx):** (Microsoft ® Excel workbook). Choose this format to:
 - Open and edit the planogram product listing in a spreadsheet application.
 - Notes:*

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- When printing the report from Excel, if the list is too wide to fit within the selected page size, additional pages are generated for the extra columns.
- Planogram images and item thumbnails are embedded in Excel files.
- In this format, any group ([Group by](#)) shown in collapsed state in [Project item list](#) is also collapsed in the Excel report list. It can be expanded if desired in Excel using the plus (+) symbol.
- **Excel 97-2003 workbook (*.xls)**: the older Excel file format. Use this for compatibility if necessary.
- **PDF (*.pdf)**: (Portable Document Format). Choose this format to:
 - Obtain the report and images in a format ready to print or send to others.
 - *Notes:*
 - Do not choose this format if you want to further edit the report layout or content.
 - In this format, if the listing columns are too wide for the selected page size, additional pages are generated for the extra columns.
 - Planogram pictures and item thumbnails are embedded in PDF files.
- Default value: **HTML (*.html)**

Create a folder

Toggles the creation of a new folder in which to save the report.

- Supported values:
 - *Checked*: a new folder is automatically created when you save a report. The folder is created within the folder selected in the *Save* dialog box and is named with the same name as the report name.
 - *Not checked*: no new folder is created when you save a report. The report is saved directly in the folder specified when saving it.
- Default value: *Not checked*

Formatting

The settings below provide diverse options to customize the layout of your reports.

Page size

A list of predefined values defining the dimensions of the pages in the report. This list includes common and custom page sizes.

- Supported values:
 - **A3 landscape**
 - **A3 portrait**
 - **A4 landscape**
 - **A4 portrait**
 - **Ledger (landscape)**
 - **Legal landscape**

- **Legal portrait**
 - **Letter landscape**
 - **Letter portrait**
 - **Tabloid (portrait)**
 - **Custom:** if you don't find a suitable preset value, choose this and set your own page width and height values in the text box which appears below. Enter values as follows: *width x height unit (cm / mm / m / in)*. Use the letter "x" to specify the multiplication symbol. If no unit type is entered, it defaults to your current choice of [Measurement unit](#) as set in the application settings.
- Default value: *A4 portrait*
 - Example: *18 x 24 cm*

Notes:

- Page size for PDF format is well supported.
- When you open an *HTML* report in a web browser, the page size doesn't have any effect when just viewing the report. Page size is only used to determine page layout for printing the reports from web browsers or when opening in paper-based applications like *Microsoft® Word*.
- The page size for *HTML* and *Excel* formats are recognized only by some web browsers and applications, as shown in the table below:

	Microsoft® Word	Microsoft® Excel	Microsoft® Edge	Google Chrome	Mozilla Firefox
Page size support	Yes	No	Yes	Yes	No

- In case page size is not supported, you must set the page layout manually in your application when you want to print a report, from *Excel* for example.

Left margin (Reports)

The width of the left margin in the report.

- Supported values: positive numeric value [0-9 and decimal point] (based on [Measurement unit](#))
- Default value: *0*
- Example: *15*

Right margin (Reports)

The width of the right margin in the report in the current choice of [Measurement unit](#).

Top margin (Reports)

The height of the top margin in the report in the current choice of [Measurement unit](#).

Bottom margin (Reports)

The height of the bottom margin in the report in the current choice of [Measurement unit](#).

Font (Reports)

Sets the typeface and its size of the text for product listings in reports. The report titles are also scaled based on the selected value.

- Supported values for the typeface: fonts installed on your computer.
- Supported values for the size: positive integer numeric values [0-9] corresponding to font point size. Maximum 100 points.
- Default value: **Arial, 8**
- Example: **Tahoma, 14**

Tip: If your report lists don't fit on the page, try to select a smaller font size.

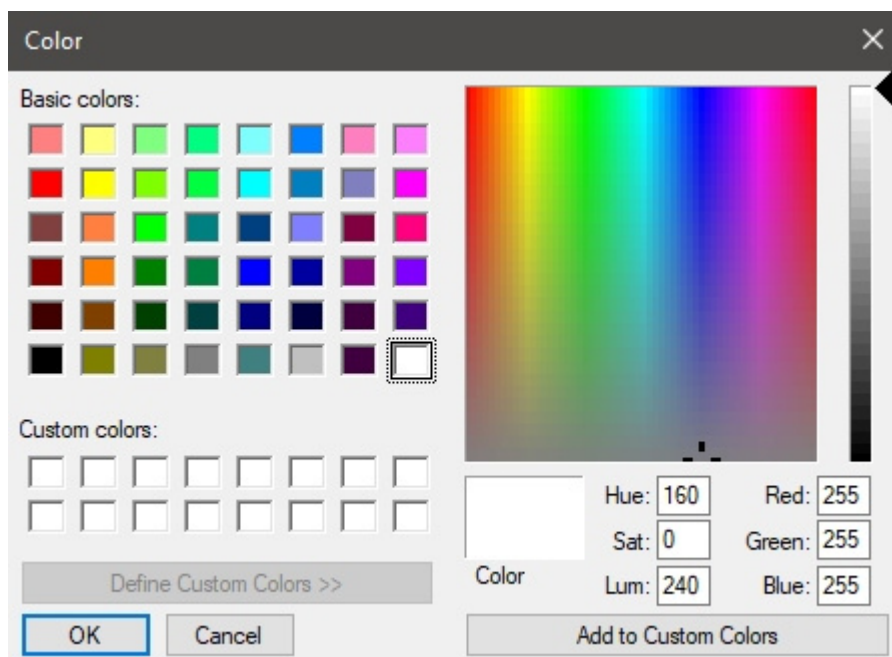
Text color (Reports)

The color of texts in reports.

- Supported values: any color picked from the color palette.
- Default value: black
- Example: blue

Instructions:

1. Click on the **color swatch** on the right of **Text color**.
2. Pick any color from the **color palette**.



3. Click **OK** to confirm.

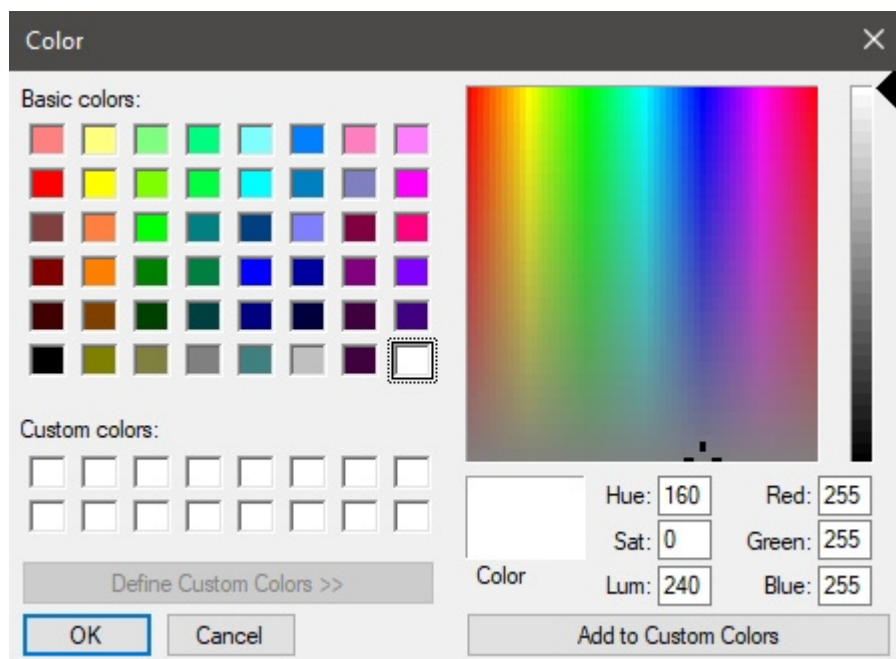
Background color (Reports)

The color of the page background for reports.

- Supported values: any color picked from the color palette.
- Default value: white
- Example: yellow

Instructions:

1. Click on the **color swatch** on the right of **Background color**.
2. Pick any color from the **color palette**.



3. Click **OK** to confirm.

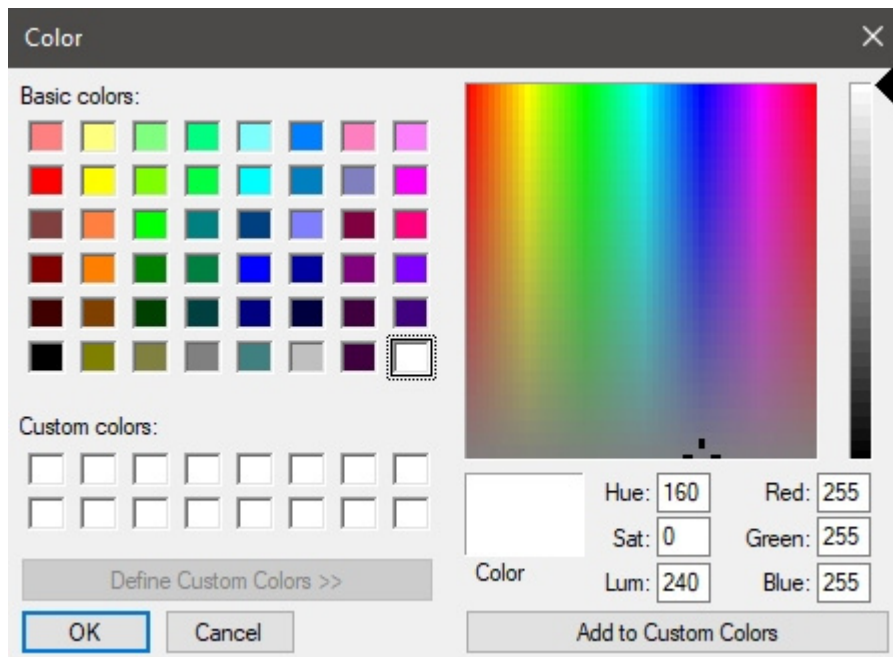
Border color (Reports)

The color of borders for the tables containing product listings.

- Supported values: any color picked from the color palette.
- Default value: silver
- Example: dark grey

Instructions:

1. Click on the **color swatch** on the right of **Border color**.
2. Pick any color from the **color palette**.



3. Click **OK** to confirm.

Resolution (Reports)

The resolution in pixels per inch (PPI) for all images in a report. Several preset choices are available, and you can also enter a custom value. The higher the setting, the more detailed your images will be. It's useful when you zoom in or when you print them. The tradeoff of a higher resolution is a larger file size.

- Supported values:
 - Screen: (96 ppi). This corresponds to the Windows system ppi with a screen scaling at 100%. Suitable for reports that are displayed on low-dpi screens that won't be zoomed in.
 - Print low: (200 ppi). Suitable for low quality printing or onscreen reports.
 - Print medium: (300 ppi). Recommended for reports that will be printed.
 - Print high: (600 ppi). Recommended for reports that you want to print in high-resolution.
 - Custom: you can specify any values up to 1000 ppi. Note that you don't have to enter *ppi* after the value.

One sheet per bay

Toggles the layout of reports between one and multiple Excel sheets.

- Supported values:
 - *Checked*: the Excel report is split into separate sheets for each bay. Each sheet includes the image(s) chosen in [Report pictures](#), and the list of items on that bay with the columns selected in [Project item list](#).
 - *Not checked*: the whole Excel report is shown on a single sheet. Each bay (image(s) and its list of items) is displayed on the same sheet and ordered vertically from the first bay at the top, to the last bay at the bottom of the sheet.
- Default value: *Not checked*

Notes:

- This option is only available if an **Excel** file format was chosen in [File format \(Reports\)](#).
- This option is only available if [Group by Bay number](#) or **Bay name** is applied in **Project item list**.

Report pictures

You can include images of your planogram project in your reports. These images are different from the ones published with [Single pictures](#): report images are taken from predefined viewpoints and are automatically cropped and zoomed to fit your planogram nicely in the report.

The checkboxes in this section let you choose which images to include in your reports.

Notes for all images in reports:

- Image dimensions are maximum 10000 pixels in width and 10000 pixels in height. Images resulting in higher pixel width or height based on the chosen [Page size](#) and [Resolution \(Reports\)](#) are clamped down to the maximum allowed pixels.
- When you output report images, the visibility of the following elements depends on your current settings in [View](#):
 - [View the room](#)
 - [View front panels](#)
 - [View peg hooks](#)
 - [View dimensions](#)
 - [View edges](#)
 - [View flow direction](#)
- If you have enabled [Group by Bay name](#) or by **Bay number**, image(s) of each bay appear(s) in the report above its respective item list. Otherwise, all images appear above the item list of the whole project.
- When [View dimensions](#) is checkmarked, your output images dimension text and arrows are adjusted automatically to result in a text height of 3 mm in your printed images. This does not correspond to the onscreen dimension text size in the visualization area.
- When [View dimensions](#) is checkmarked, the type of dimension shown in the report images vary depending on the type of images:
 - **Project (Report pictures)**: these images include the dimensions of each cluster of shelving (each isolated bay and each group of adjacent bays). Dimensions of room elements are also shown, but only for room elements which are selected in the visualization area. The *width*, *height* and *depth* are displayed depending on the viewing angle and the available space for dimensioning. You can adjust the view with [Zoom](#), [Pan](#), [Orbit](#) to display the desired dimensions.
 - **Images of individual bays** ([Bay\(s\) orthographic](#), [Bay\(s\) perspective](#), [Bay\(s\) orthographic schematic](#), [Bay\(s\) perspective schematic](#)): these images include bay dimensions, plus vertical shelf measures and lateral distances between each Dividing panel.
 - **Front views** only show *width* and *height*.
 - **Top views** only show *width* and *depth*.

Project (Report pictures)

An image showing your entire planogram to include in the report. Note that this image also reflects if you have set the current viewing modes in [Schematic view \(View\)](#) and [Orthographic view](#).

The project report picture appears just after the report main title, before any other image and report list.

You can toggle each of the two available viewpoints:

Front

- Supported values:
 - Checkmarked:*
 - With **Free bay placement** not checkmarked, the planogram project is shown from the front and is framed to fit on the page.
 - With **Free bay placement** checkmarked, the planogram project is shown from the same viewing angle as in **Visualization area** and is framed to fit on the page.
 - Not checkmarked:* the image of the project seen from the front is not included in the report.
- Default value: *Not checkmarked*

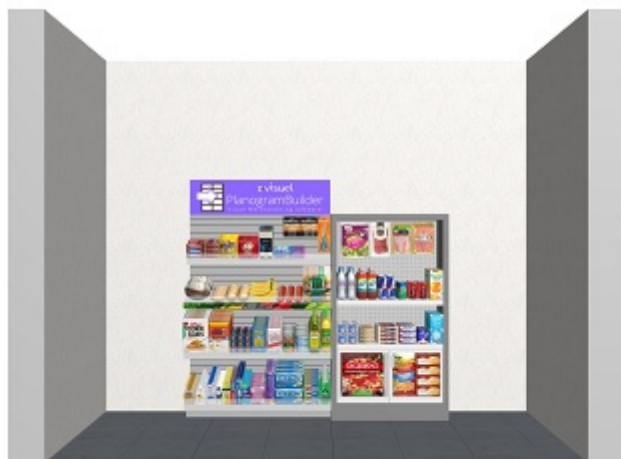


Image on the left: Example with Free bay placement not checkmarked

Image on the right: Example with Free bay placement checkmarked

Top

- Supported values:
 - Checkmarked:* the planogram project is viewed from the top.
 - Not checkmarked:* the image of the project seen from the top is not included in the report.
- Default value: *Not checkmarked*



Example of a project seen from Top

Bay(s) orthographic

An image of each individual bay with no perspective effect to include in the report.

You can toggle each of the two available viewpoints:

Front

- Supported values:
 - *Checked*: the bay is shown from the front and is framed to fit on the page.
 - *Not checked*: the image of the bay seen from the front is not included in the report.
- Default value: *Not checked*



Example of Bay(s) orthographic – Front

Top

- Supported values:
 - *Checked:* the bay is shown from the top and is framed to fit on the page.
 - *Not checked:* the image of the bay seen from the top is not included in the report.
- Default value: *Not checked*

Bay(s) perspective

A picture of each bay with a perspective effect to include in the report.

You can toggle each of the two available viewpoints:

Front

- Supported values:
 - *Checked:* the bay is shown from the front and is framed to fit on the page.
 - *Not checked:* the image of the bay seen from the front is not included in the report.
- Default value: *Not checked*



Example of Bay(s) perspective – Front

Top

- Supported values:
 - Checked*: the bay is shown from the top and is framed to fit on the page.
 - Not checked*: the image of the bay seen from the top is not included in the report.
- Default value: *Not checked*

Bay(s) orthographic schematic

A schematic view of each bay with no perspective effect to include in the report.

PlanogramBuilder uses the current values set in [Schematic view \(Settings\)](#) to determine the style of the schematic view (Product style, Product labels, etc.).

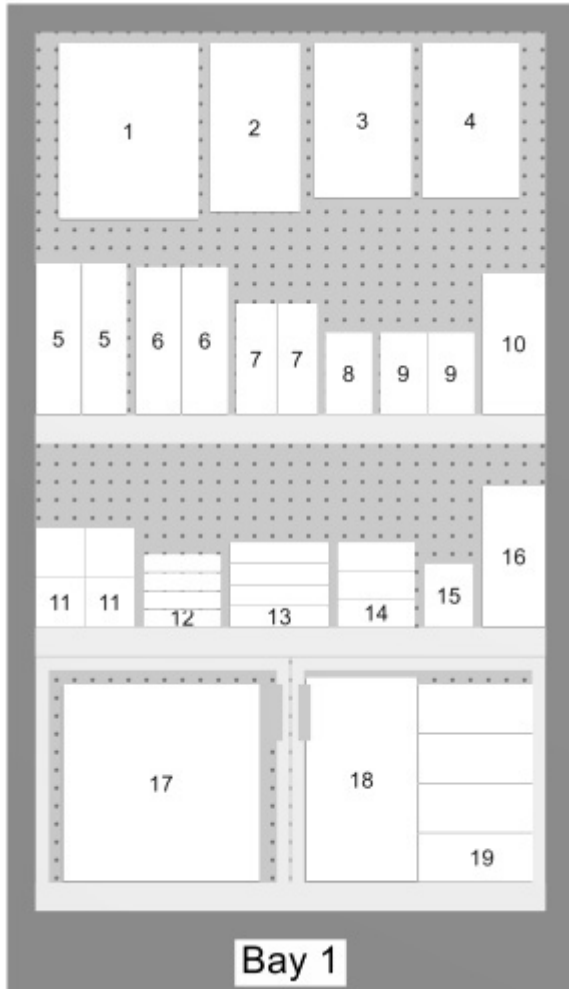
Tip: To easily find each product in this report image and in the item listing:

- [Schematic view \(Settings\)](#): select to display labels of **Position** on the products
- [Content choice \(Project item list\)](#): also include the column of [Position](#).

You can toggle each of the two available viewpoints:

Front

- Supported values:
 - Checked*: the bay is shown from the front and is framed to fit on the page.
 - Not checked*: the image of the bay seen from the front is not included in the report.
- Default value: *Not checked*



Example of Bay(s) orthographic schematic – Front

Top

- Supported values:
 - Checked*: the bay is shown from the top and is framed to fit on the page.
 - Not checked*: the image of the bay seen from the top is not included in the report.
- Default value: *Not checked*

Bay(s) perspective schematic

A schematic view of each bay with a perspective effect to include in the report.

PlanogramBuilder uses the current values set in [Schematic view \(Settings\)](#) to determine the style of the schematic view (Product style, Product labels, etc.).

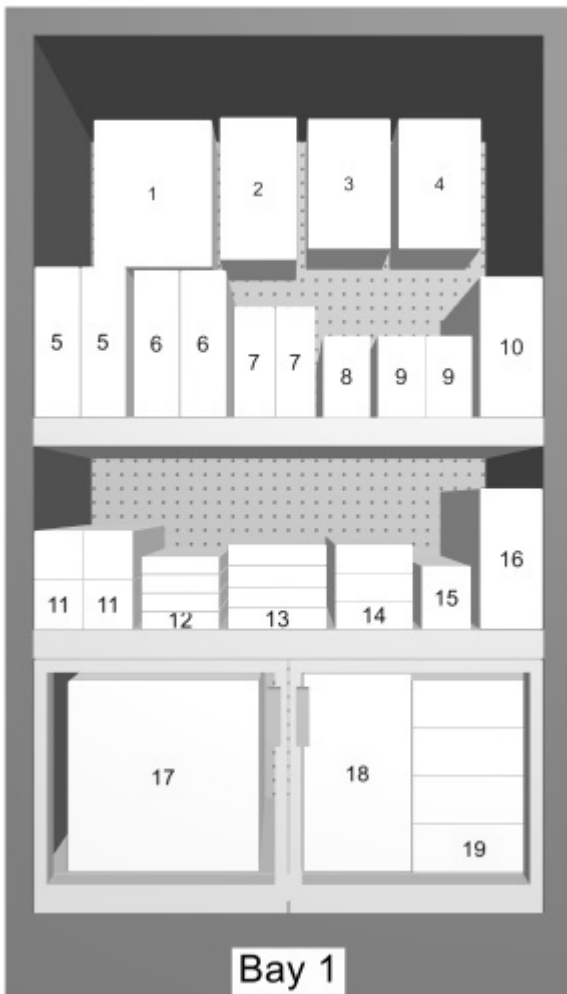
Tip: To easily find each product in this report image and in the item listing:

1. [Schematic view \(Settings\)](#): select to display labels of **Position** on the products.
2. [Content choice \(Project item list\)](#): also include the column of [Position](#).

You can toggle each of the two available viewpoints:

Front

- Supported values:
 - *Checked*: the bay is shown from the front and is framed to fit on the page.
 - *Not checked*: the image of the bay seen from the front is not included in the report.
- Default value: *Not checked*



Example of Bay(s) perspective schematic - Front

Top

- Supported values:
 - *Checked*: the bay is shown from the top and is framed to fit on the page.
 - *Not checked*: the image of the bay seen from the top is not included in the report.

- Default value: *Not checkmarked*

Report List

Reports also contain the list of all the products used in a project.

The report list reflects what is displayed in [Project item list](#). For this reason, this list is always displayed in the task named **Publish**.

Make sure to configure **Project item list** to obtain the desired layout and content in your reports. We advise saving [Presets](#) of the list for diverse needs.

Notes on groups in report lists:

- If you have not grouped items by any property in **Project item list**, the report contains a single list with all items. (Consult [Group by](#))
- if you have grouped items by Bay name or by Bay number, the report contains a separate item list for each bay in the report.
- If you have grouped items by any other property (e.g., *category*), the report contains a single list with all items. Additional rows with a distinct color show the name of each group (e.g., *beverage*). See below example:

Position	Bay - Shelf	Reference	Name	Category	Facings Wide	Facings High
Beverage						
5	1-2	zv-0000000004	Evian - bottle PET - 500ml	Beverage	2	1
6	1-2	zv-0000000003	Nestea Lemon - bottle PET - 500ml	Beverage	2	1
7	1-2	zv-0000000027	Red Bull - can - 355ml	Beverage	2	1
8	1-2	zv-0000000002	Sprite - can - 330ml	Beverage	1	1
9	1-2	zv-0000000001	Coca-Cola - can - 330ml	Beverage	2	1
10	1-2	zv-0000000026	Juice - orange - carton - 1l	Beverage	1	1
					10	6
Dairy						
11	1-3	zv-0000000013	Yoghurt - vanilla - cup - 80g	Dairy	2	2
12	1-3	zv-0000000022	Brie - wrap plastic - 200g	Dairy	1	4
13	1-3	zv-0000000021	Gruyère - wrap plastic - 170g	Dairy	1	4
14	1-3	zv-0000000012	Butter - wrap alu - 200g	Dairy	1	3
15	1-3	zv-0000000023	Cream - whipping - carton - 200ml	Dairy	1	1
16	1-3	zv-0000000008	Milk 3.5% - carton - 1l	Dairy	1	1
					7	15
Frozen Food						
17	1-4	zv-0000000028	Pizza - supreme - carton - 283g	Frozen Food	1	1
18	1-4	zv-0000000029	French Fries - golden - pouch - 907g	Frozen Food	1	1
19	1-4	zv-0000000030	Ice cream - vanilla - tub - 1kg	Frozen Food	1	4
					3	6
Meat						
2	1-1	zv-0000000024	Prosciutto - sliced - blister - 85g	Meat	1	1
3	1-1	zv-0000000017	Ham - sliced - blister - 100g	Meat	1	1
4	1-1	zv-0000000018	Salami - sliced - blister - 100g	Meat	1	1
					3	3
Produce						
1	1-1	zv-0000000025	Salad - green mix - blister - 350g	Produce	1	1
					1	1
					24	31

Tools and commands (Publish)

This task toolbar contains commands to output either [Single pictures](#) and [Reports](#).



The object editing toolbar and the general editing commands are also available to edit objects in your planogram while in this task.

Copy picture

Takes a snapshot of your project as it appears in the visualization area and puts it in the clipboard. You can then directly paste it in another application like Microsoft ® Word, PowerPoint, etc.

Note: consult the description, examples and instructions to configure the image in [Single pictures](#).

Save picture

Saves an image of your project as it appears in the visualization area to your local hard disk. You will be requested to select a destination folder and a filename.

Note: consult the description, examples and instructions to configure the image and file format in [Single pictures](#).

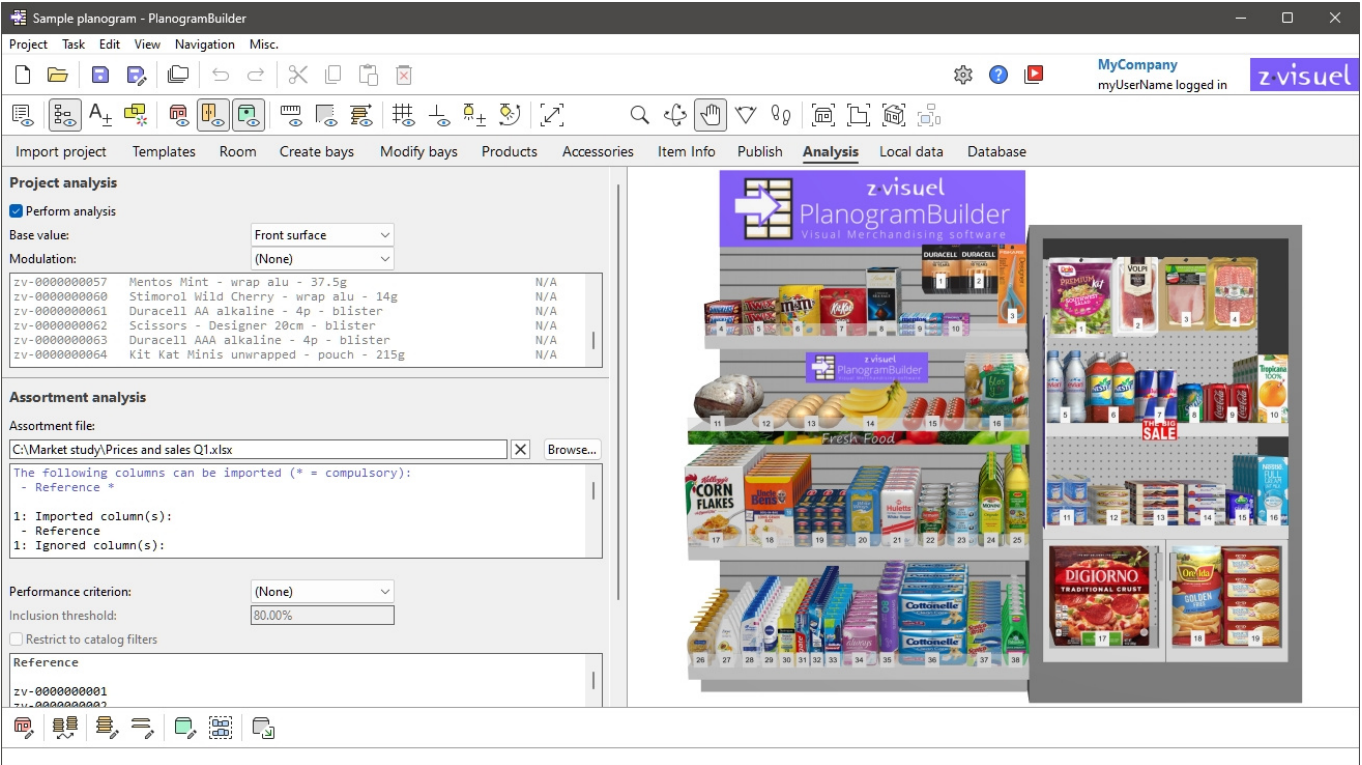
Report

Saves a report with a list of items and optional images of your project to your local hard disk.

Note: consult the description, examples and instructions to configure the report and file format in [Reports](#).

Analysis

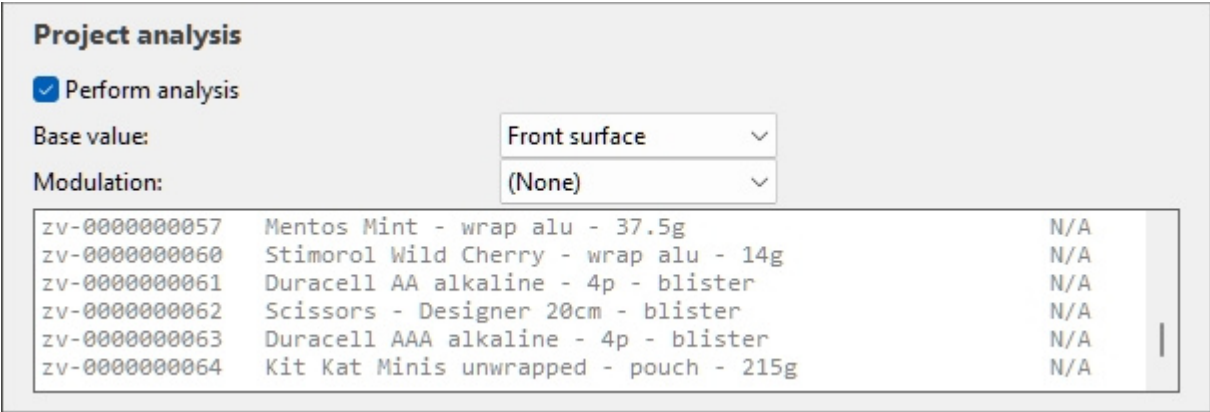
This task regroups tools to help you choose the best assortment ([Assortment analysis](#)) and verify the performance of your Planograms ([Project analysis](#)).



Project analysis

The goal of Project analysis is to display in real-time (i.e. updated continuously when building a planogram) various metrics based on your product properties, your planogram arrangement and real-world market data such as pricing and sales.

This enables you to check your planogram performance as a whole and per product.



Here is a typical workflow to analyze your current project:

1. [Perform analysis](#).
2. Adjust [Base value](#) and [Modulation](#).

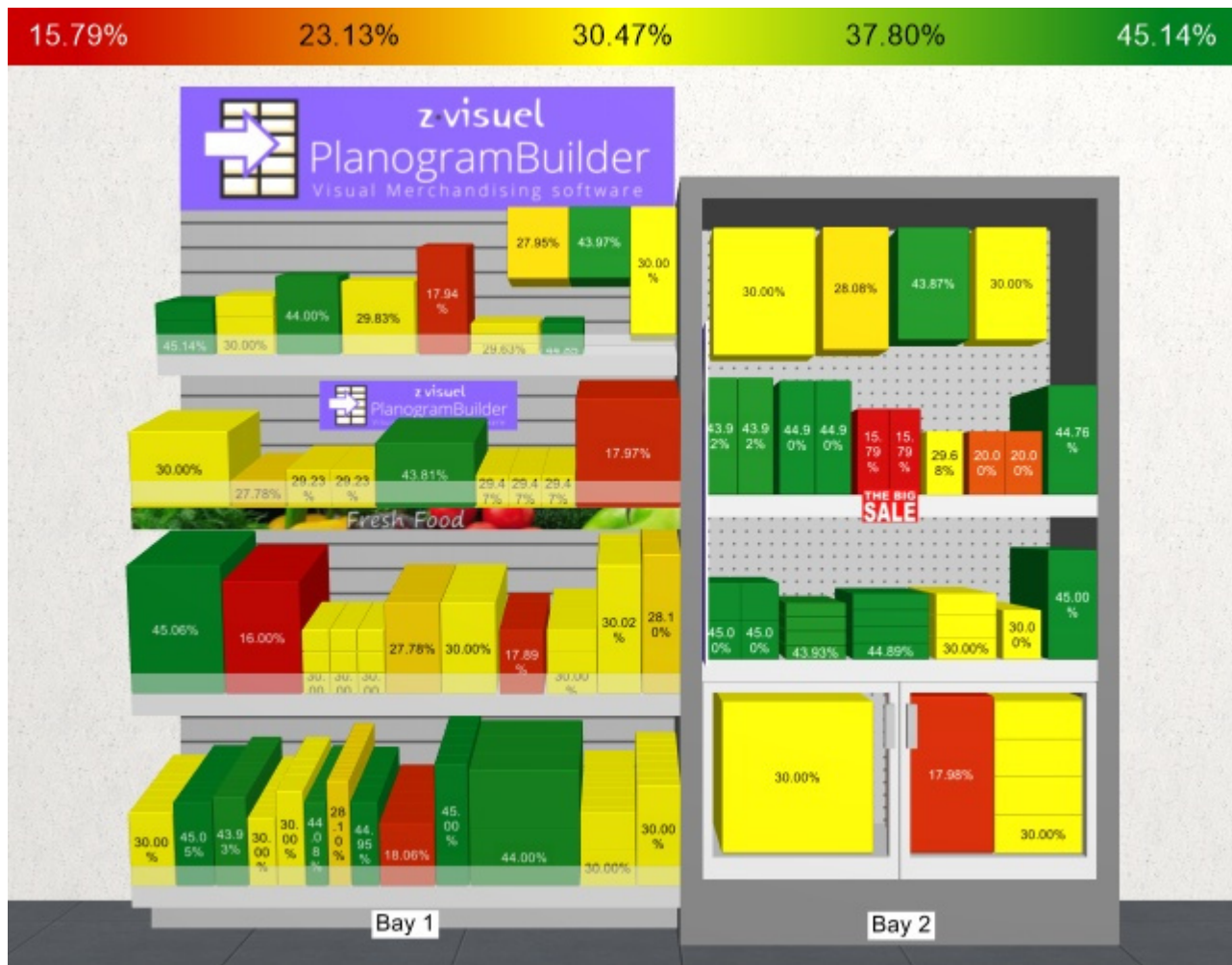
3. See the complete results in the [Results log \(Project analysis\)](#).
4. Optionally also display the analysis results as various indications on screen:
 - [Project analysis value](#) in Project item list.
 - [Highlight by](#) (Colored highlights) on products in the visualization area and in Project item list.
 - [Product labels](#) on products in the visualization area in Schematic view.

Examples of combinations displaying the analysis results as colored highlights, with product labels and in schematic mode:









Commands (Project analysis)

Perform analysis

Toggles the activation of the analysis calculations.

- Supported values:
 - Checked*: Project analysis is active.
 - Not checked*: Project analysis is not active.
- Default value: *Not checked*

Note: the analysis is performed for each product reference found in the current project. If a given product reference is found at several locations in your planogram, the analysis result for this product combines all its occurrences.

Parameters (Project analysis)

The analysis can be configured with the parameters below.

Base value

This drop-down list lets you choose the main criteria to perform the project analysis.

- Supported values:
 - Front surface:** Consult [Front surface \[Measurement unit2\]](#).
 - Linear space:** Consult [Linear space \[Measurement unit\]](#).
 - Markup Sales:** Consult [Markup \[Currency symbol\] \(Sales value\)](#).
 - Markup On shelf:** Consult [Markup \[Currency symbol\] \(Shelf value\)](#).
 - Markup percent:** Consult [Markup percent \[Currency symbol\] \(Shelf value\)](#).
 - Quantity sold:** Consult [Quantity sold \(Sales figures file\)](#).
 - Profit margin:** Consult [Profit margin \[Currency symbol\] \(Shelf value\)](#).
 - Retail value (tax excl.) Sales:** Consult [Retail value \(tax excl.\) \[Currency symbol\] \(Sales value\)](#).
 - Retail value (tax excl.) On shelf:** Consult [Retail value \(tax excl.\) \[Currency symbol\] \(Shelf value\)](#).
 - Retail value (tax incl.) Sales:** Consult [Retail value \(tax incl.\) \[Currency symbol\] \(Sales value\)](#).
 - Retail value (tax incl.) On shelf:** Consult [Retail value \(tax incl.\) \[Currency symbol\] \(Shelf value\)](#).
 - Sales tax rate:** Consult [Sales tax rate](#).
 - Single item markup:** Consult [Single item markup](#).
 - Retail price (tax excl.):** Consult [Retail price \(tax excl.\)](#).
 - Retail price (tax incl.):** Consult [Retail price \(tax incl.\)](#).
 - Buying price:** Consult [Buying price](#).
 - Volume used:** Consult [Volume used \[Measurement unit3\]](#).
 - Buying value Sales:** Consult [Buying value \[Currency symbol\] \(Sales value\)](#).
 - Buying value On shelf:** Consult [Buying value \[Currency symbol\] \(Shelf value\)](#).
- Default value: **Front surface**

Modulation

Depending on [Base value](#), you can modulate the analysis result to take into account the quantity on shelf or the space used by the products in your current project.

This is useful for example to perform space versus sales analysis.

- Supported values:

(None) (Project analysis)

Shows the direct results of the analysis selected in [Base value](#) (no modulation applied).

Per front facing

Divides the results of [Base value](#) by the number of products in the block seen from the front.

	Result of analysis (Base value)
/	Facings wide × Facings high
=	Result (Per front facing)

Per linear space

Divides the results of [Base value](#) by the width used by the product block.

	Result of analysis (Base value)
/	Linear space [Measurement unit]
=	Result of analysis (Per linear space)

Per front surface

Divides the results of [Base value](#) by the front surface used by the product block.

	Result of analysis (Base value)
/	Front surface [Measurement unit2]
=	Result of analysis (Per front surface)

Per volume used

Divides the results of [Base value](#) by the volume used by the product block.

	Result of analysis (Base value)
/	Volume used [Measurement unit3]
=	Result of analysis (Per volume used)

- Default value: **(None)**

Results log (Project analysis)

This is the text area where results of the analysis are shown, listing one product per line with its value.

Reference	Name	Value [%]
zv-0000000027	Red Bull - can - 355ml	15.79
zv-0000000001	Coca-Cola - can - 330ml	20.00
zv-0000000002	Sprite - can - 330ml	29.68
zv-0000000004	Evian - bottle PET - 500ml	43.92
zv-0000000026	Juice - orange - carton - 1l	44.76
zv-0000000003	Nestea Lemon - bottle PET - 500ml	44.90
	Average	33.17

The total and average values for your project are also displayed on the last line when applicable.
The text color of each line represents the product value on a graded scale, using the same colors as when highlighting products based on the analysis results ([Highlight by](#) > [Project analysis value](#)).

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

Notes:

- Undefined metrics are displayed with the **N/A** value.
- Metrics based on incomplete data have the **(MD)** (missing data) value appended to the calculated value.

Log context menu (Project analysis)

Right-click in the log area to see its context menu.

Columns >	
Undo	Ctrl+Z
Redo	Ctrl+Y
Cut	Ctrl+X
Copy	Ctrl+C
Paste	Ctrl+V
Delete	Delete
Select all	Ctrl+A

The following tools and options are available:

- **Columns:** lets you choose the columns to display in the log:
 - **Reference:** a column with [Reference](#) of each product.
 - **Name:** a column with [Name \(Item properties\)](#) of each product.
 - **Value:** a column with the result of the analysis.
- **Copy:** lets you copy selected text from the log (**Ctrl + c**).
- **Select all:** selects all the text in the log (**Ctrl + a**).

Tip: to preserve the text colors and format when you paste the analysis results in another application, choose the paste methods labeled *Rich Text Format*, *formatted text RTF* or *Keep format*.

Assortment analysis

Assortment analysis lets you define a subset of the products in your database.

You can then optionally rank and filter this subset by sales and by classification to optimize your planogram assortment, with the performance of each product displayed in [Results log \(Assortment analysis\)](#). The analysis results can also be used to filter and sort the products in [Catalog of products](#).

One of the typical use cases is applying the Pareto principle to identify the most valuable products.

Assortment analysis

Assortment file:

C:\Market study\Prices and sales Q1.xlsx
Browse...

The following columns can be imported (* = compulsory):

- Reference *

1: Imported column(s):

- Reference

1: Ignored column(s):

Performance criterion:

(None) v

Inclusion threshold:

80.00%

☐ Restrict to catalog filters

Reference

zv-0000000001

zv-0000000002

zv-0000000004

zv-0000000005

Here is a typical workflow to perform an assortment analysis:

1. Define and load the desired list of products to analyze ([Assortment file](#)).
2. Set the analysis Parameters ([Performance criterion](#), [Inclusion threshold](#), [Restrict to catalog filters](#)). Depending on your choice of Performance criterion, you may also need [Price list file](#) and [Sales figures file](#).
3. See the complete analysis results in [Results log \(Assortment analysis\)](#).
4. Optionally rank and filter the Product catalog based on the analysis results ([Assortment \(mode in Catalog of products\)](#)).

Assortment file

A file defining the list of products you want to analyze.

It can contain all or a subset of the products in your database, each listed by [Reference](#).

Products not found in your database and disabled products (consult [Enabled](#)) are disregarded by the analysis.

- Supported file formats: Microsoft Excel (*.xls or *.xlsx)
- Example file: you can download the following file listing the products in all food categories of the sample products in PlanogramBuilder:
[sample_files/assortment_analysis/assortment_analysis_sample_source_file.xlsx](#)

Supported columns (Assortment file)

Reference: a compulsory column with this header name.

- Supported values on each line: [Reference](#) value of a product existing in the database.
- Example: zv-00000000028

Loading the assortment file

Click on **Browse**.

1. Select your assortment file on your PC.
2. The path and name of the currently loaded assortment file is displayed in the text box.
3. An import log is displayed in the text area just below the filename, so you can verify if the imported data is correct.
 - In **blue** text, to help you prepare your input spreadsheet: list of supported columns
 - In **black** text, once you've imported a file: list of imported and ignored columns.
4. In **red** text, once you've imported a file: list of errors
5. Click on the **red cross button** if you want to unload the current file.

Notes:

- The analysis is performed as soon as a valid file is loaded.
- The file path persists over PlanogramBuilder sessions.
- PlanogramBuilder provides an automatic reload of the local data files. This is useful since you can keep the Excel application open to edit your local data, save changes in Excel with *Ctrl-S* and instantly reflect the changes in PlanogramBuilder.

Tips:

- You can select (*Ctrl + a*) and copy (*Ctrl + c*) text from the import log. This is also available from its contextual menu.
- You can zoom in/out in the log window using *Ctrl + mouse wheel*. The default zoom level is reset on task switch.

Parameters (Assortment analysis)

The following parameters let you customize the analysis.

Performance criterion

A drop-down list with a choice of criteria to rank the products.

- Supported values:

(None) (Assortment analysis)

This choice lets you create a sub-assortment of your database based on Assortment file, but without any analysis. The products are listed by Reference alphabetically in [Results log \(Assortment analysis\)](#).

Note: requires [Assortment file](#)

Tip: To work on a subset your database in the product catalog, use this method combined with [Assortment \(mode in Catalog of products\)](#).

Markup (Assortment analysis)

This choice sorts the products by their markup value based on the quantity sold.

	Single item markup
×	Quantity sold

= Markup (Assortment analysis)

Note: requires [Assortment file](#), [Price list file](#) and [Sales figures file](#)

Quantity sold (Assortment analysis)

This choice sorts the products by quantity of items sold defined in Sales figures file, not taking into account the monetary value of each item. The product with the highest number of units sold is ranked first and the lowest number of units sold is ranked last.

Note: requires [Assortment file](#) and [Sales figures file](#)

Retail value (tax excl.) (Assortment analysis)

This sorts the products by the amount of money generated from sales before tax. The product with the highest sales revenue is ranked first and the one with the lowest sales revenue is last.

Retail price (tax excl.)
× Quantity sold
= Retail value (tax excl.) (Assortment analysis)

Note: requires [Assortment file](#), [Price list file](#) and [Sales figures file](#)

Retail value (tax incl.) (Assortment analysis)

This sorts the products by the amount of money generated from sales including tax. The product with the highest sales revenue is ranked first and the one with the lowest sales revenue is last.

Retail price (tax incl.)
× Quantity sold
= Retail value (tax incl.) (Assortment analysis)

Note: requires [Assortment file](#), [Price list file](#) and [Sales figures file](#)

Inclusion threshold

This parameter lets you specify a percentage threshold defining which products are valuable enough to keep.

This type of analysis uses what is known as the Pareto principle to identify the vital few versus the trivial many products. Applied to sales, this principle states that the vast majority of your results are generated by a small percentage of products.

- Supported values: positive numeric percentage value [0-9 and decimal point] (0%-100%)
- Default value: **80%**
- Example: **100%**

Inclusion threshold represents the cumulated percentage values you want to reach to decide which products are parts of the vital few. A ratio of 80/20 (80% value) is often used but you can enter any desired percentage value.

Example of an analysis:

With 80% and using Retail value (tax excl.) (Assortment analysis) as performance criterion, the analysis works as follows:

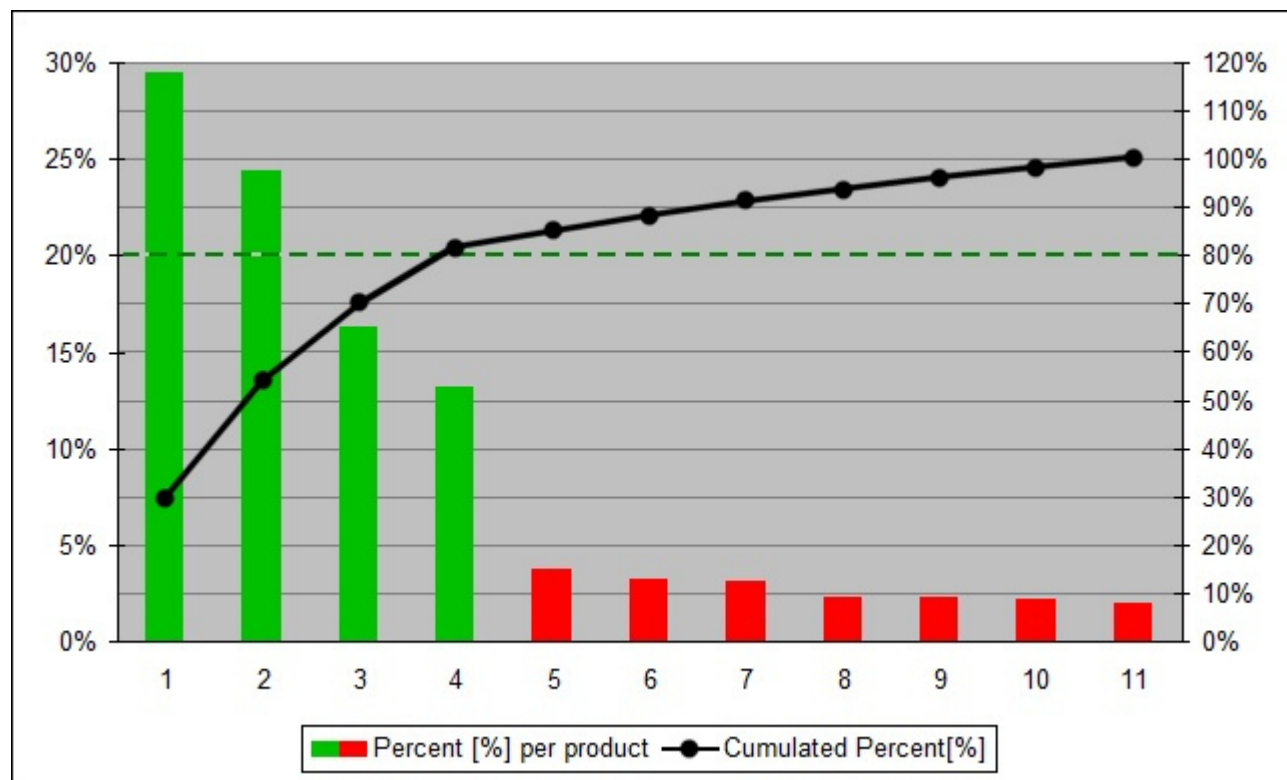
1. The products listed in your Assortment File are analyzed.
2. They are ranked by Retail value (tax excl.) (Assortment analysis).

- Starting with the highest-ranking product, Retail value (tax excl.) (Assortment analysis) are added for each product until their sum reaches the 80% threshold. These products are judged above threshold by the analysis (the vital few).
- The remaining products, for which the sub-total of Retail value (tax excl.) (Assortment analysis) makes up 20% or less of the total are judged below threshold by the analysis (the trivial many).

Here is an analysis result log for the above example with 11 products. In this example, 4 products (in green) are enough to reach at least 80% of the revenue. The remaining 7 products (in red) amount to less than 20% of the revenue:

Reference	Name	Rank	Value [\$]	Percent [%]	Cumulative Value [\$]	Cumulative Percent [%]
zv-0000000037	Toilet paper - Cottonelle - wrap plastic	1	189.00	29.43	189.00	29.43
zv-0000000047	Shampoo - Classic clean - flacon - 400ml	2	156.80	24.41	345.80	53.84
zv-0000000036	Razor - Sensor 2 - pouch - 12 pieces	3	104.50	16.27	450.30	70.11
zv-0000000034	Sanitary napkins - box - 30 pieces	4	72.00	11.21	522.30	81.32
zv-0000000031	Body wash - avocado - flacon - 500g	5	23.75	3.70	546.05	85.02
zv-0000000048	Hand cream - Soothing care - tube - 75ml	6	20.50	3.19	566.55	88.21
zv-0000000035	hand soap - liquid - flacon - 221ml	7	19.80	3.08	586.35	91.30
zv-0000000032	Toothpaste - MaxFresh - tube - 170g	8	14.70	2.29	601.05	93.59
zv-0000000046	Make-up pads - bag - 80 pieces	9	14.40	2.24	615.45	95.83
zv-0000000050	Sunscreen - Beach Defense 70 - spray - 184g	10	14.20	2.21	629.65	98.04
zv-0000000049	Toothbrush - Pro-Flex soft - blister	11	12.60	1.96	642.25	100.00

Below is a typical Pareto graph illustrating the same example :



Restrict to catalog filters

Toggles limiting the analysis to the products currently filtered by [Classification hierarchy \(Catalog of products\)](#) in [Catalog of products](#).

- Supported values:

- *Checkmarked*: the analysis is done only on the products in [Assortment file](#) belonging to the classification level currently selected in Catalog of products. Products not in the current selected level are ignored by the analysis.

Tip: Use this method to analyze sales for any category, brand or other item classification properties you have defined. For example, select any category in the product catalog and see right away how products rank just within this category.

- *Not checkmarked*: the analysis is done on all the products in Assortment file. In this case the assortment analysis results will be the same no matter what classification level is selected in Catalog of products.
- Default value: *Not checkmarked*

Results log (Assortment analysis)

After loading Assortment file, the results of the analysis are shown in the log area, listing one product per line.

- In **black** text with no result: ignored products (excluded by [Restrict to catalog filters](#))
- In **red** text with no result: ignored products with missing values.
- In **green** text with results: products within [Inclusion threshold](#).
- In **red** text with results: products outside Inclusion threshold.

```
zv-0000000044: Ignored product
zv-0000000045: Ignored product
zv-0000000047: Quantity sold missing value
zv-0000000052: Ignored product
```

Reference	Rank	Value [\$]	Percent [%]	Cumulative Value [\$]	Cumulative Percent [%]
zv-0000000036	1	46.97	27.12	46.97	27.12
zv-0000000037	2	41.58	24.01	88.55	51.12
zv-0000000031	3	29.96	17.30	118.51	68.42
zv-0000000046	4	23.49	13.56	142.00	81.98
zv-0000000034	5	9.10	5.25	151.10	87.24
zv-0000000032	6	6.48	3.74	157.58	90.98
zv-0000000048	7	6.15	3.55	163.73	94.53
zv-0000000035	8	5.94	3.43	169.67	97.96
zv-0000000049	9	3.54	2.04	173.21	100.00
zv-0000000050	10	0.00	0.00	173.21	100.00

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

Notes:

- Undefined metrics are displayed with the **N/A** value.
- Metrics based on incomplete data have the **(MD)** (missing data) value appended to the calculated value.

Log context menu (Assortment analysis)

Right-click in the log area to see its context menu.

Columns >	
Undo	Ctrl+Z
Redo	Ctrl+Y
Cut	Ctrl+X
Copy	Ctrl+C
Paste	Ctrl+V
Delete	Delete
Select all	Ctrl+A

The following tools and options are available:

- **Columns:** lets you choose the columns to display in the log:
 - **Reference:** a column with [Reference](#) of each product.
 - **Name:** a column with [Name \(Item properties\)](#) of each product.
 - **Rank:** a column showing the ranking of each product in the analysis.
 - **Value:** a column with the result of the analysis for each product.
 - **Percent:** a column with the result of the analysis, in percentage of the total of all analyzed products.
 - **Cumulative Value:** a column with the result of the analysis for the cumulated values of analyzed products up to the current product in the list.
 - **Cumulative Percent:** a column with the result of the analysis for the cumulated values of analyzed products up to the current product in the list in percentage of the total of all analyzed products.
- **Copy:** lets you copy selected text from the log (**Ctrl + c**).
- **Select all:** selects all the text in the log (**Ctrl + a**).

Tip: To preserve the text colors and format when you paste the analysis results in another application, choose the paste method labeled *Rich Text Format, formatted text RTF or Keep format*.

Assortment (mode in Catalog of products)

In addition to viewing the results in [Results log \(Assortment analysis\)](#), you can also use the assortment analysis results to rank and filter items in [Catalog of products](#).

















This is very useful to help you easily find the best performing products while you are building up your planogram.

- Supported values:
 - *Checkmarked:* the analysis results are not displayed in Catalog of products. In this mode, the catalog displays a reflection of your assortment analysis results:
 - Products are sorted from the highest to the lowest performer.
 - Their respective performance percentages are displayed in blue text below the product thumbnails. The percentage values will differ if [Restrict to catalog filters](#) is checkmarked or not checkmarked.

- Low performing products (outside the specified [Inclusion threshold](#)) are hidden from the catalog listing.
- *Not checkmarked*: the analysis results are not displayed in Catalog of products.
- Default value: *Not checkmarked*

Instructions:

1. Perform **Assortment analysis** as instructed in the above sections.
2. Switch to the task: [Products](#).
3. Check the checkbox named Assortment. It is located just above the search filter and appears only when Assortment analysis is active.

Category	<input checked="" type="checkbox"/> Assortment Search by Name: <input type="text"/>			
* Bakery Beverage Canned Food Cleaning Confectionery Cooking Oil	 Banana - 5 pieces - 500g			
	 Body wash - avocado - flacon - 500g			
	 Bread - long bun - 70g			
	 Bread - round bun - 50g			
Brand				
* _no brand Always Barilla B-B Products Blas Y Tir Coca-Cola	 Bread - round loaf - 500g			
	 Brie - wrap plastic - 200g			
	 Butter - wrap alu - 200g			
	 Coca-Cola - can - 330ml			
Product line				
* Batteries Body Bread Butter Candies Cereal	 Corn flakes - box - 500g			
	 Dishwashing liquid - flacon - 591ml			
	 Duracell AA alkaline - 4p - blister			
	 Duracell AAA alkaline - 4p - blister			
	 Evian - bottle PET - 500ml			
	 Flour - plain - bag - paper - 1kg			
	 French Fries - golden - pouch - 907g			
	 Gruyère - wrap plastic - 170g			

Notes:

- In this mode, you can still use [Search by text \(Catalog of products\)](#) within the displayed products.
- Just uncheck **Assortment** to display the product catalog with all products and without taking into account the results of **Assortment analysis**.
- Undefined metrics are displayed with the **N/A** value.
- Metrics based on incomplete data have the **(MD)** (missing data) value appended to the calculated value.

Analysis options

This pane contains options applying to both [Project analysis](#) and [Assortment analysis](#).

Analysis options
Currency symbol:

Currency symbol

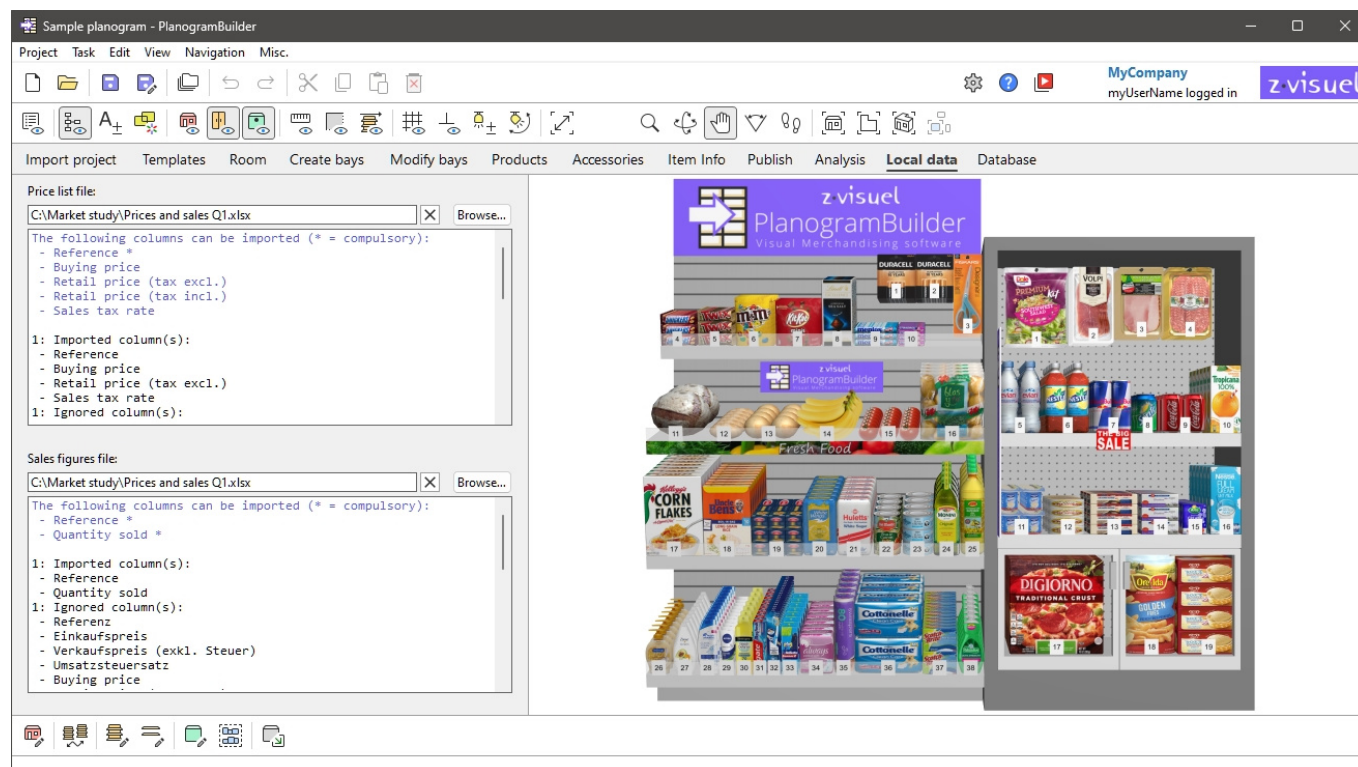
The currency symbol to display in analysis results for monetary values.

- Supported values: text, including Unicode characters for non-Latin text values
- Default value: empty (= none)
- Example: \$

Local data

This task allows you to load products data from local files, additional to but not saved in the database, such as pricing and sales figures.

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



Price list file

A file with the prices of your products.

The prices can then be used to calculate and display various figures on screen and in reports. For example, they can be used by [Assortment analysis](#) and by [Project item list](#).

Price list file:

C:\Market study\Prices and sales Q1.xlsx X Browse...

The following columns can be imported (* = compulsory):

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

1: Imported column(s):

- Reference
- Buying price
- Retail price (tax excl.)
- Sales tax rate

1: Ignored column(s):

The price list can contain all or a subset of the products in your database, each listed by [Reference](#). Products not found in your database are disregarded.

- Supported file formats: Microsoft Excel (*.xls or *.xlsx)
- Example file: you can download an example of a valid price file containing prices for the sample products in PlanogramBuilder:
[sample_files/price_list/price_list_sample_source_file.xlsx](#)

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

Supported columns (Price list file)

The imported file can contain the following columns with the exact column header names listed below and one value per product on each line:

Reference

A compulsory column with this header name.

- Supported values on each line: [Reference](#) value of a product existing in the database
- Example: zv-0000000028

Buying price

An optional column with this header name.

- Supported values on each line: the product buying price, in positive numeric value [0-9 and decimal point], without currency symbol
- Example: 14.50

Retail price (tax excl.)

An optional column with this header name.

- Supported values on each line: the product selling price, before tax, in positive numeric value [0-9 and decimal point], without currency symbol
- Example: 38.14

Retail price (tax incl.)

An optional column with this header name.

- Supported values on each line: the product selling price, tax-included, in positive numeric value [0-9 and decimal point], without currency symbol
- Example: 45

Sales tax rate

An optional column with this header name.

- Supported values on each line: the product sales tax, in positive numeric percentage value [0-9 and decimal point], with the percent symbol.
- Example: 19%

Loading a price list file

Instructions:

1. Click on **Browse**.
2. Select your price list file on your PC.
3. The path and name of the currently loaded file is displayed in the text box.
4. An import log is displayed in the text area just below the filename, so you can verify if the imported data is correct.
 - In **blue** text, to help you prepare your input spreadsheet: list of supported columns
 - In **black** text, once you've imported a file: list of imported and ignored columns.
 - In **red** text, once you've imported a file: list of errors
5. Click on the **red cross button** if you want to unload the current file.

Notes:

- The file path persists over PlanogramBuilder sessions.

- PlanogramBuilder provides an automatic reload of the local data files. This is useful since you can keep the Excel application open to edit your local data, save changes in Excel with *Ctrl-S* and instantly reflect the changes in PlanogramBuilder.
- The column header names are not case sensitive. You can use any mix of lower-case and upper-case header names.
- If some columns and/or values are missing, PlanogramBuilder won't be able to display or calculate related figures for the corresponding products.
- If you have additional columns, they won't hurt and will be ignored for the pricing information (e.g., Name, Brand, Category, Behavior, etc.). So, you can for example use the same file to import your product database ([Import list + images](#)) and your product pricing.

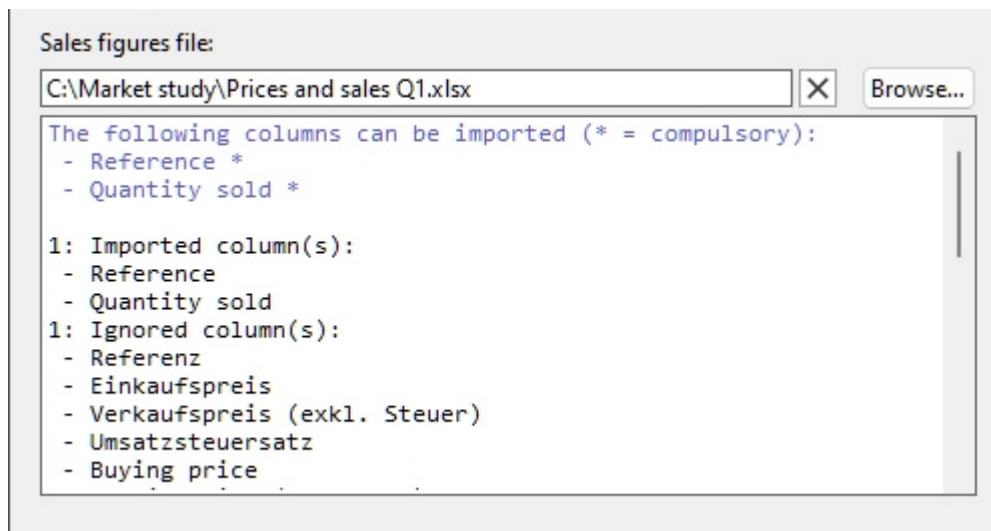
Tips:

- You may have several price list files for the same products, but for different retailers or different geographic zones. Just load the one corresponding to your current needs.
- You only need to provide 2 of the 3 following columns. PlanogramBuilder will derive the missing third column values:
 - [Retail price \(tax excl.\)](#)
 - [Retail price \(tax incl.\)](#)
 - [Sales tax rate](#)
- You can select (Ctrl + a) and copy (Ctrl + c) text from the import log. This is also available from its contextual menu.
- You can zoom in/out in the log window using *Ctrl + mouse wheel*. The default zoom level is reset on task switch.

Sales figures file

A file with sales statistics of your products.

The sales numbers can then be used to calculate and display various metrics on screen and in reports. For example, they can be used by [Assortment analysis](#) and by [Project item list](#).



The sales figures can contain all or a subset of the products in your database, each listed by [Reference](#). Products not found in your database are disregarded.

- Supported file formats: Microsoft Excel (*.xls or *.xlsx)

- Example file: you can download the following file containing sales figures for the sample products in PlanogramBuilder:
[sample_files/sales_figures/sales_figures_sample_source_file.xlsx](#)

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

Supported columns (Sales figures file)

The imported file can contain the following columns with the exact column header names listed below and one value per product on each line:

Reference

A compulsory column with this header name.

- Supported values on each line: [Reference](#) value of a product existing in the database
- Example: `zv-0000000028`

Quantity sold (Sales figures file)

An optional column with this header name.

- Supported values on each line: the number of units sold for the product, in positive integer numeric value [0-9]
- Example: `145`

Loading a sales figures file

Instructions:

1. Click on **Browse**.
2. Select your price list file on your PC.
3. The path and name of the currently loaded file is displayed in the text box.
4. An import log is displayed in the text area just below the filename, so you can verify if the imported data is correct.
 - In **blue** text, to help you prepare your input spreadsheet: list of supported columns

- In **black** text, once you've imported a file: list of imported and ignored columns.
 - In **red** text, once you've imported a file: list of errors
5. Click on the **red cross button** if you want to unload the current file.

Notes:

- The file path persists over PlanogramBuilder sessions.
- PlanogramBuilder provides an automatic reload of the local data files. This is useful since you can keep the Excel application open to edit your local data, save changes in Excel with *Ctrl-S* and instantly reflect the changes in PlanogramBuilder.
- The column header names are not case sensitive. You can use any mix of lower-case and upper-case header names.
- If some columns and/or values are missing, PlanogramBuilder won't be able to display or calculate related figures for the corresponding products.
- If you have additional columns, they won't hurt and will be ignored for the sales figures information (e.g., Name, Brand, Category, Behavior, etc.). So, you can for example use the same file to import your product database ([Import list + images](#)) and your product sales.

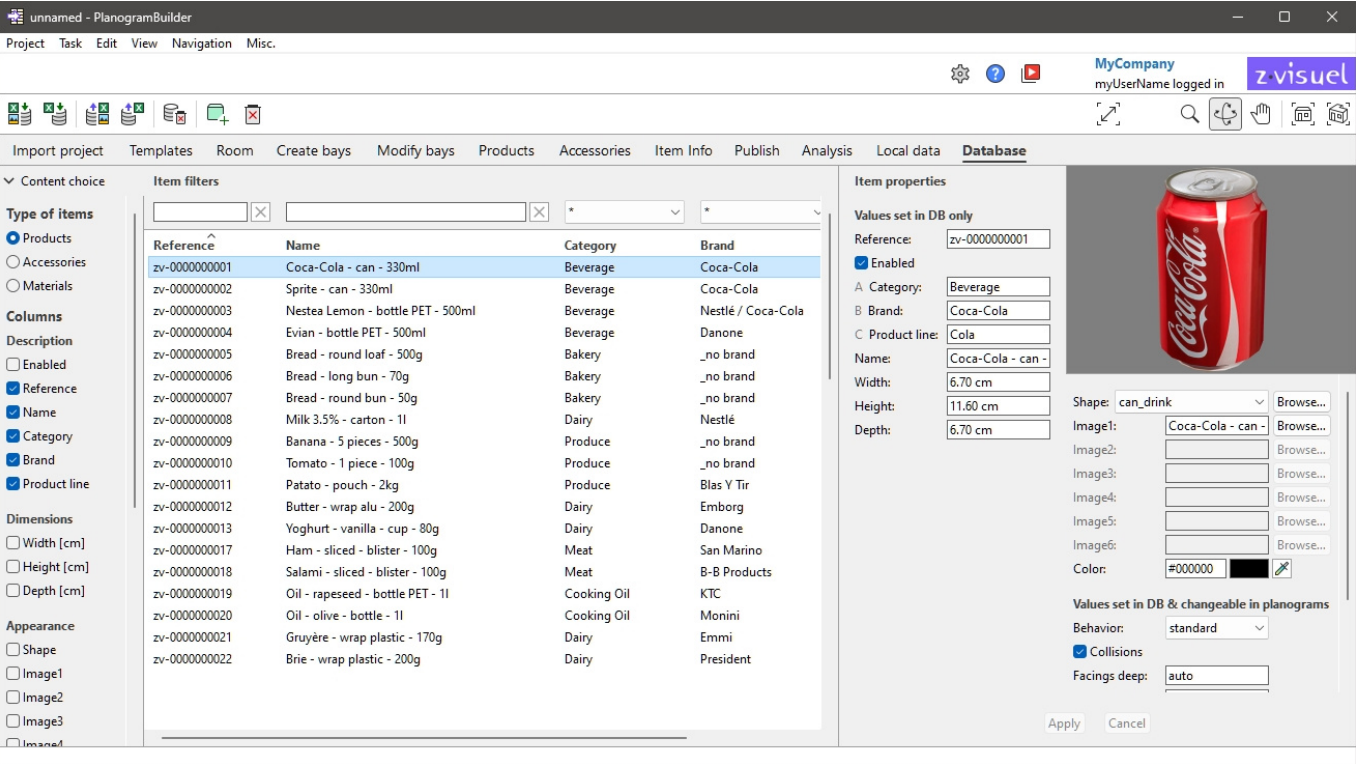
Tips:

- You may have several sales figures files for the same products, but for different retailers or different geographic zones. Just load the one corresponding to your current needs.
- You can select (*Ctrl + a*) and copy (*Ctrl + c*) text from the import log. This is also available from its contextual menu.
- You can zoom in/out in the log window using *Ctrl + mouse wheel*. The default zoom level is reset on task switch.

Database

Video tutorial on this topic: [4: Introduction to the database](#)

This task is where you add, edit and delete materials, products and accessories in your database. Once added to the database, the items become available for your planograms.



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

Each PlanogramBuilder customer (typically a company) has a distinct database, which is not shared with other customers.

Each customer can have an unlimited number of registered users accessing the same customer database. This system keeps your product assortment always up to date for each PlanogramBuilder user in your company.

When you launch PlanogramBuilder, the program connects to your database and looks for the items in the database. All the items found in your database are listed in the database task. They also appear in [Catalog of products](#) or [Catalog of accessories](#), ready to drag and drop into your planograms.

Important note:

- You must have a role of [PlanogramBuilder Administrator](#) to edit the database.
- Users with the role of [Standard User](#) have read-only access.

Note: PlanogramBuilder comes only with a small set of sample items to help as examples. Before starting to create planograms, a [PlanogramBuilder Administrator](#) in your company must import or directly enter information about your products: name, EAN, dimensions, etc. and image(s). If you don't have such data available, you may be able to obtain them from the manufacturer or from third-party product databases, such as the ones listed below:

- <https://www.ean-search.org/>
- <https://www.upcdatabase.com/>
- <https://www.gs1.org/services/gdsn>
- <https://www.mynetfair.com/>
- <https://www.grocery.com/open-grocery-database-project>
- <https://openfoodfacts.org/>

Database item list

The left side of the screen shows a list of your database items in a table like a spreadsheet.

Content choice

Type of items

Products

Accessories

Materials

Columns

Description

Enabled

Reference

Name

Category

Brand

Product line

Dimensions

Width [cm]

Height [cm]

Depth [cm]

Appearance

Shape

Image1

Image2

Image3

Image4

Item filters

*

*

*

Reference	Name	Category	Brand	Product line
zv-0000000001	Coca-Cola - can - 330ml	Beverage	Coca-Cola	Cola
zv-0000000002	Sprite - can - 330ml	Beverage	Coca-Cola	Soda
zv-0000000003	Nestea Lemon - bottle PET - 500ml	Beverage	Nestlé / Coca-Cola	Tea
zv-0000000004	Evian - bottle PET - 500ml	Beverage	Danone	Water
zv-0000000005	Bread - round loaf - 500g	Bakery	_no brand	Bread
zv-0000000006	Bread - long bun - 70g	Bakery	_no brand	Bread
zv-0000000007	Bread - round bun - 50g	Bakery	_no brand	Bread
zv-0000000008	Milk 3.5% - carton - 1l	Dairy	Nestlé	Milk
zv-0000000009	Banana - 5 pieces - 500g	Produce	_no brand	Fruit
zv-0000000010	Tomato - 1 piece - 100g	Produce	_no brand	Vegetable
zv-0000000011	Patato - pouch - 2kg	Produce	Blas Y Tir	Vegetable
zv-0000000012	Butter - wrap alu - 200g	Dairy	Emborg	Butter
zv-0000000013	Yoghurt - vanilla - cup - 80g	Dairy	Danone	Yoghurt
zv-0000000017	Ham - sliced - blister - 100g	Meat	San Marino	Cold Cuts
zv-0000000018	Salami - sliced - blister - 100g	Meat	B-B Products	Cold Cuts
zv-0000000019	Oil - rapeseed - bottle PET - 1l	Cooking Oil	KTC	Vegetable
zv-0000000020	Oil - olive - bottle - 1l	Cooking Oil	Monini	Vegetable
zv-0000000021	Gruyère - wrap plastic - 170g	Dairy	Emmi	Cheese
zv-0000000022	Brie - wrap plastic - 200g	Dairy	President	Cheese
zv-0000000023	Cream - whipping - carton - 200ml	Dairy	Arla	Cream

Content choice (Database item list)

This menu on the left of the list header bar lets you configure what is displayed in the list.

Content choice

Type of items

☒ List products

☐ List accessories

Columns

Picture

☒ Thumbnail

Position

☒ Position

☐ Bay number

☐ Bay name

☐ Shelf/Row

☐ Bay - Shelf

☐ Horizontal id

Description

☐ Enabled

☒ Reference

To display this pane:

1. Click on the **right-pointing arrow** next to Content choice.
2. The pane is now displayed.

To hide this pane:

1. Click on the **down-pointing arrow** next to Content choice.
2. The panel is now hidden.

Type of items (Database item list)

Three radio buttons let you choose what type of items you want to work on:

- [Product](#)
- [Accessory](#)
- [Material](#)

Click on one of the radio buttons to choose the type of items to display. For example, when **Product** is selected, you will not see Material or Accessory in the list. You can switch from one type to another at any time.

Consult [Type \(Item properties\)](#) for a description of each type of items.

Columns

This section lets you choose which item properties you want to see listed as columns in the list.

For each property displayed in the list as a column, its value is shown for each product, accessory or material.

All the available properties are in the form of checkboxes which toggles the display of the corresponding column in the list.

You can find the list of all available properties in [Item properties](#).

- Supported values:
 - *Checked*: the corresponding values are displayed in the list.
 - *Not checked*: the corresponding values are not displayed in the list.
- Default values: based on your last choices

Notes:

- if some columns don't fit in the list pane, you can use the horizontal scrollbar to view them.
- Properties which are not available are not shown in the column choices. For example, **Facings deep** is not displayed when you are listing accessories or materials.

Item filters

Filters are available for many columns.

Text filters

Some columns can be filtered by text (ex: **Reference**, **Name**) to display only matching items. The text filters accept single or multiple keywords following these rules:

- Keywords are not case sensitive.
- Multiple keywords must be separated by spaces.
- Multiple keywords search for values containing all the keyword.
- The order of keywords doesn't matter.

Example: type *frozen CHOCOLATE* in the textbox above the column with Name. This will display all the items containing **chocolate** AND **frozen** in their name.

Note: Items with same text values but mixed upper and lower case are grouped in the database list. E.g., *Lego* and *LEGO* are grouped as the same value.

Drop-down filters

Some other columns can be filtered by selecting a matching value in drop-down lists.

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

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

Item sorting

By clicking on the header of each column, you can sort the list according to the column content. For example, to order the list by product names, click on *Name*. To order it by references, click on *Reference*. Clicking again on a header reverses the order.

Item selection

You can select one or several items in the list for further processing or to modify its / their properties. Once the item(s) is(are) selected, you can see and modify its(their) properties in [Item properties](#).

To select 1 item:

1. Click on the desired item to select it in the list. It becomes highlighted.

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

To select multiple items, there 2 methods:

- Method 1:
 - a. Click on one item in the list to select it.
 - b. Hold the **Ctrl** key and click on another item to select it.
 - c. Repeat the above step to select additional items.
- Method 2:
 - a. Click on the first desired item in the list.
 - b. Hold the **Shift** key and click on the last desired item in the list.
 - c. All the items listed from the first to the last one selected also become selected.
 - d. You can select additional items using method 2.

To deselect items:

1. Use the above methods to click again on the selected item(s) that you want to deselect.

Item properties

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

Item properties

Values set in DB only

Reference:

☒ Enabled

A Category:

B Brand:


C Product line:

Name:

Width:

Height:

Depth:



Shape:

Image1:

Image2:

Image3:

Image4:

Image5:

Image6:

Color:

Values set in DB & changeable in planograms

Behavior:

☒ Collisions

Facings deep:

Width gap:

Height gap:

Depth gap:

Lateral offset:

Vertical offset:

The available properties vary depending on the type of item(s) selected.

The only property for which a value is compulsory is [Reference](#).

We however recommended also always assigning values for the following basic properties:

- [Name \(Item properties\)](#)
- [Width \(Item properties\)](#)
- [Height \(Item properties\)](#)
- [Depth \(Item properties\)](#)
- [A \[A: Classification - level 1\]](#)
- [B \[B: Classification - level 2\]](#)

- [C \[C: Classification - level 3\]](#)
- [Image \(1 – 6\)](#)
- [Behavior](#)

Other properties can often be left empty, in which case default values will be used.

Note: if you have selected multiple items, the property values that are common to all selected items are displayed. A blank value is displayed for property values which vary across the selected items.

The property pane is divided into two groups of properties, each described below.

Values set in DB only

The upper part of this pane contains the item properties which values are defined in the database and cannot be modified per item in a planogram project.

They are typically attributes inherent to the item itself, which keep the same values in any planogram, such as its dimensions, name or color.

Each property is described below.

Type (Item properties)

This property defines the type of item in the database.

- Supported values:

Product

This type of items corresponds to the items you sell. It also includes tester products placed in front of the sellable packaged version (consult **tester** in [Product behaviors](#)).

Accessory

This type is used for all items displayed on shelves to enhance product presentation: shelf strips, labels, headers, posters, non-sellable products displayed without packaging, etc.

Material

This type of items consists in images that can be applied to the store structural elements (consult [Room](#)) for a more realistic look: tiled floor, concrete, carpets, etc.

- Default values:
 - In spreadsheets: empty cell (= *Product*)
 - In GUI: your choice of **Type of items** in **Content choice**

The type of each item can be displayed in [Project item list](#) (therefore also in [Reports](#)).

Note: In spreadsheets, when batch importing items, you can still use our previous notation system for these values:

- **0** for Product
- **1** for Accessory
- **2** for Material

Reference

The compulsory unique identifier of the item.

This property is used to identify each item in the database. Each item must therefore have a distinct value which cannot be used for any other item.

Also, the value assigned at creation cannot be changed in the database afterwards, contrary to all other properties.

We advise using the EAN, UPC, SKU code or any other permanent and unique product reference.

- Supported values: `[0-9][A-Z][a-z][the space character]$&@=.,;~)([]{}{`
- Unsupported values: all characters not listed above (e.g., non-Latin characters). Invalid characters are replaced by an underscore `[_]` when batch importing.
- Default value: none
- Example: `045631548b`

Notes:

- The number symbol `[#]` is not allowed in the database task field but can be used with a special meaning with [Import list + images](#) and with [Import list](#).
- For materials, a value is automatically assigned, although you can also enter your own value if you wish.

Enabled

The state of activation of the item.

- Supported values:
 - **Yes** (checked in the GUI): the item is available in the catalogs to place in planograms ([Catalog of products](#), [Catalog of accessories](#)).
 - **No** (not checked in the GUI): the item exists in the database but is not available in the catalogs. Disabling items is useful to prevent other users in your company from placing these items in planograms, such as products that are no longer sold but you may want to reactivate later.
- Default value: **Yes** (checked in the GUI)

Tip: you can highlight disabled items in red in the current planogram project. Consult [Highlight by Enabled](#).

Note: In spreadsheets, when batch importing or exporting items, you can still use our previous notation system for these values: **1** for Yes, **0** for No.

A [A: Classification - level 1]

The item classification value at the first level. (Before using this property, consult [Item classification properties](#) to define its name.)

Assign this optional value to organize your item.

- Supported values: text, including Unicode characters for non-Latin text values
- Default value: empty (= none)
- Example: *Drinks*

Note: items with empty values are shown in the catalog as: *undefined*.

Note: this value is not case sensitive, so items with variations are grouped in the database list and in the item catalogs. E.g., *Toys* and *TOYS* are grouped as the same value.

B [B: Classification - level 2]

The item classification value at the second level classification property. (Before using this property, consult [Item classification properties](#) to define its name.)

Assign this optional value to organize your item.

- Supported values: text, including Unicode characters for non-Latin text values
- Default value: empty
- Example: *Coca-Cola*

Note: items with empty values are shown in the catalog as: *undefined*.

Note: this value is not case sensitive, so items with variations are grouped in the database list and in the item catalogs. E.g., *Toys* and *TOYS* are grouped as the same value.

C [C: Classification - level 3]

The item classification value at the third level classification property. (Before using this property, consult [Item classification properties](#) to define its name.)

Assign this optional value to organize your item.

- Supported values: text, including Unicode characters for non-Latin text values
- Default value: empty (= none)
- Example: *Cherry*

Note: items with empty values are shown in the catalog as: *undefined*.

Note: this value is not case sensitive, so items with variations are grouped in the database list and in the item catalogs. E.g., *Toys* and *TOYS* are grouped as the same value.

Name (Item properties)

The name of the item.

Assigning a value for this property is optional but very recommended to help you identify the item in the catalog and in your planograms.

Enter the actual item name, typically as printed on the item packaging.

- Supported values: text, including Unicode characters for non-Latin text values
- Default value: empty (= none)
- Example: *Coca-Cola Zero 500 ml*

Note: For materials, if the value is empty, an initial value is automatically assigned using the image file name (without the extension) as basis. You can also assign your own value if you prefer.

Item custom properties [1 – 12]

The value of the item for the selected custom property.

A maximum of 12 user defined custom properties can optionally be used to assign values to each item in your database. Only the custom properties which have been defined appear in the database item properties. Consult [Item custom properties \(Settings\)](#) to define your custom properties.

- Supported values: text, including Unicode characters for non-Latin text values
- Default value: empty (= none)
- Example: *5 kg*

Width (Item properties)

Width (Item properties) (for products and accessories)

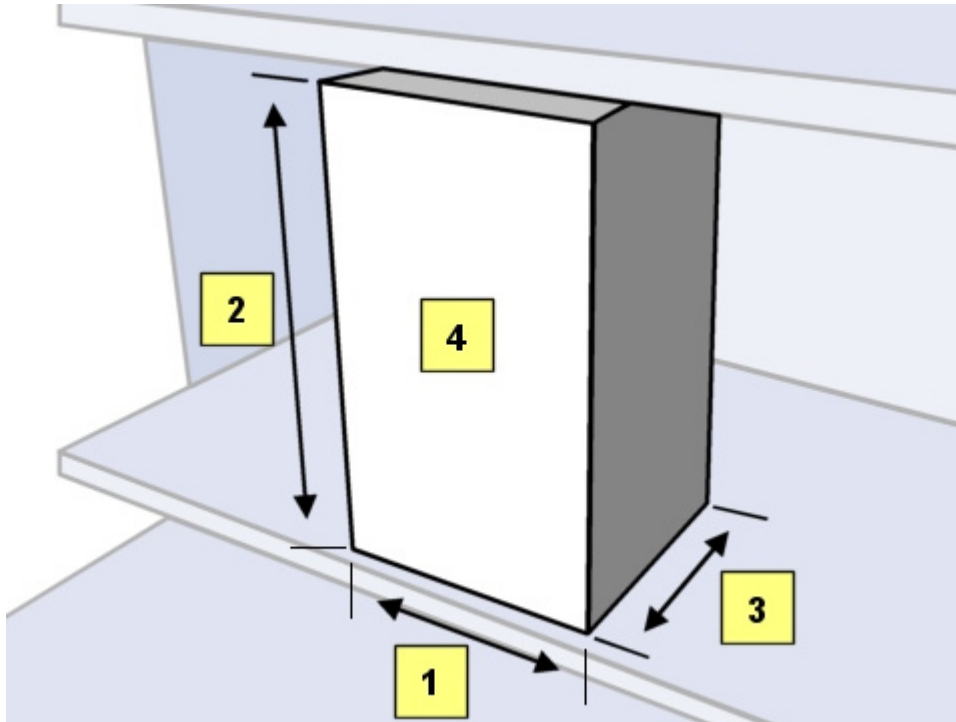
The physical width of the item in the current measurement unit.

- Supported values: positive numeric value [0-9 and decimal point]
- Default value: empty (= 10 cm, 100 mm, 0.1 m, 5 inches; according to [Measurement unit](#))
- Example: 6.5

Tip: You don't need to type the actual measurement unit (e.g., cm), only the value.

Important note:

The Width is based on the item seen from the front when placed on the shelf, so it is always the left to right dimension. So, Width is not necessarily the largest dimension of the item. See the illustration below:



1. width
2. height
3. depth
4. the front of the item when placed on shelf

Width (Item properties) (for materials)

The width of 1 image tile when [Tile](#) is *checked*.

- Default value: empty (= 100 cm, 1000 mm, 1 m, 36 inches; according to [Measurement unit](#))
- Example: 45

Height (Item properties)

Height (Item properties) (for products and accessories)

The physical height of the item in the current measurement unit.

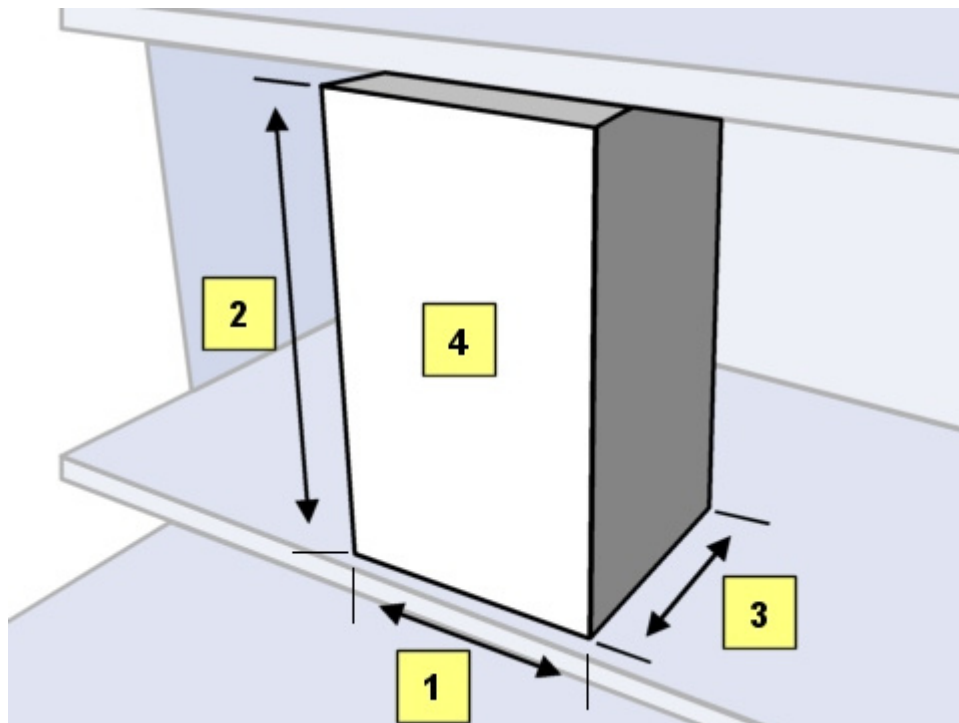
- Supported values: positive numeric value [0-9 and decimal point]

- Default value: empty (= 10 cm, 100 mm, 0.1 m, 5 inches; according to [Measurement unit](#))
- Example: 10.2

Tip: You don't need to type the actual measurement unit (e.g., cm), only the value.

Important note:

The Height is based on the item seen from the front when placed on the shelf, so it is always the top to bottom dimension. See the illustration below:



1. width
2. **height**
3. depth
4. the front of the item when placed on shelf

Height (Item properties) (for materials)

The height of 1 image tile when [Tile](#) is *checked*.

- Default value: empty (= 10 cm, 100 mm, 0.1 m, 5 inches; according to [Measurement unit](#))
- Example: 45

Depth (Item properties)

Depth (Item properties) (for products and accessories)

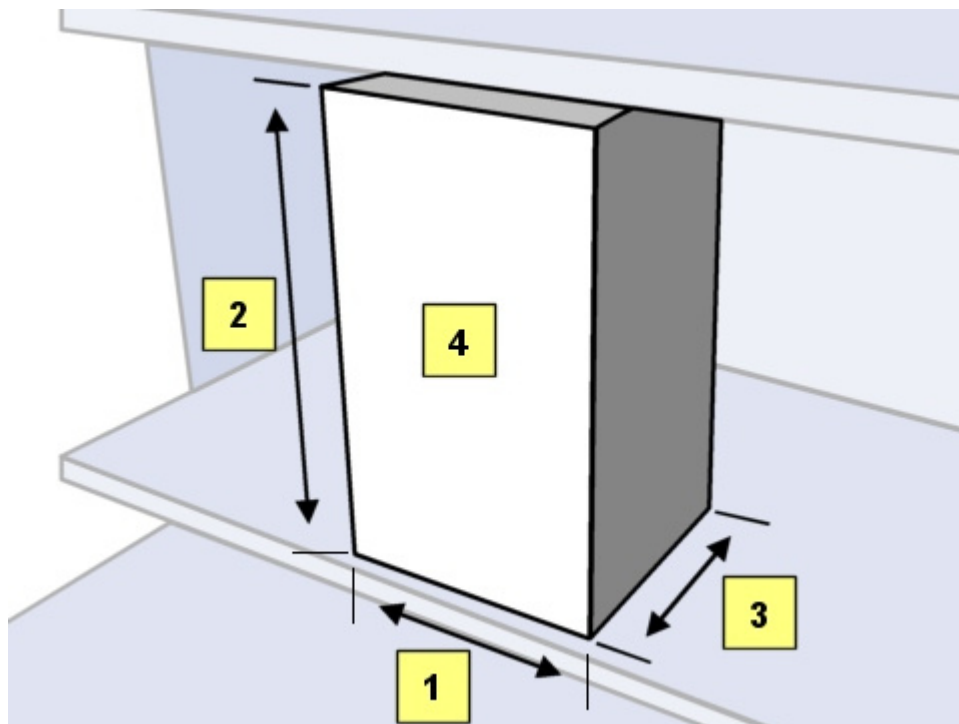
The physical depth of the item in the current measurement unit.

- Supported values: positive numeric value [0-9 and decimal point]
- Default value: empty (= 10 cm, 100 mm, 0.1 m, 5 inches; according to [Measurement unit](#))
- Example: 7.14

Tip: You don't need to type the actual measurement unit (e.g., cm), only the value.

Important note:

The Depth is based on the item seen from the front when placed on the shelf, so it is always the front to back dimension. So, depth is not necessarily the smallest dimension of the item. See the illustration below:



1. width
2. height
3. **depth**
4. the front of the item when placed on shelf

Shape

Video tutorial on this topic: [6: Adding products of various shapes to the database](#)

The geometric shape most resembling the item appearance.

This usually corresponds to the packaging shape for Products, and to the item unpackaged shape for accessories.

The application uses the specified shape to automatically generate a 3D model of the selected item, which is scaled to the dimensions you specify and optionally combined with the uploaded image(s).

- Supported values: consult the lists below
- Default values:
 - In spreadsheets: empty cell (= *box*)
 - In GUI: *box*
- Example: *alpha_plane_standing*













PlanogramBuilder comes with the following set of basic shapes:















Shapes for 1 image (no transparency)















You can upload up to 1 image with the following shapes.







These shapes disregard the image transparency that may exist in the uploaded image.

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

Shape name	Description	Shape without image	Example with image applied
box (default value)	A box for 1 image applied to all 6 sides. <i>Note:</i> If you don't specify a shape, this shape is used by default.		
Box_rounded	A box with rounded edges for 1 image applied to all 6 sides.		
bottle_soda_large	A large soda bottle (e.g., 2 liters) for 1 image applied to front and back.		
bottle_soda_small	A small soda bottle (e.g., 0.5 l) for 1 image applied to front and back.		
bottle_square	A bottle with 4 flat sides for 1 image applied to front and back.		
bottle_tapered	A bottle with tapered top for 1 image applied to front and back.		

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

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

pouch_standing	A soft pouch placed vertically for 1 image applied to front, back and bottom.		
sphere	A sphere / ovoid shape for 1 image applied to front and back.		
tube	A tube for 1 image applied to front and back. Use for toothpaste, cream and similar items.		





Shapes for 1 image (with transparency)







You can upload up to 1 image with the following shapes.

These shapes retain the image transparency that may exist in the uploaded image (consult [Image transparency](#)).

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

The list below is sorted alphabetically:

Shape name	Description	Shape without image	Example with image applied
alpha_cloth_lying	A shape well suited for clothing laying flat, for 1 image applied to top and bottom.		
alpha_cloth_standing_front	A shape well suited for clothing hanging facing front for 1 image applied to front and back.		


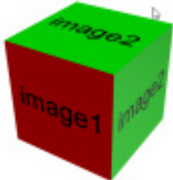
Shape name	Description	Shape without image	Example with image applied
alpha_cloth_standing_sideways	A shape well suited for clothing hanging facing sideways for 1 image applied to left and right side.		
alpha_plane_lying	<p>A horizontal plane for 1 image applied to top and bottom.</p> <p>It has no visible thickness, but the specified height is still accounted for to stack items in planograms.</p> <p>You can use this for items laying flat and not resembling any of the other provided 3D shapes.</p>		
alpha_plane_standing	<p>A vertical plane for 1 image applied to front and back.</p> <p>It has no visible thickness, but the specified depth is still accounted for to space items in planograms.</p> <p>You can also use this for items facing front and not resembling any of the other provided 3D shapes.</p>		






Shapes for 2 images (no transparency)

You can upload up to 2 images with the following shapes.

These shapes disregard the image transparency that may exist in the uploaded image.

The list below is sorted alphabetically:

Shape name	Description	Shape showing image position
bag_lying - 2 pics - 1 front - 2 top bottom	<p>A bag for 2 images:</p> <p><i>Image1</i> applied to front side</p> <p><i>Image2</i> applied to top & bottom sides</p>	
box 2pics - 1 front - 2 other faces	<p>A box for 2 images:</p> <p><i>Image1</i> applied to front side</p> <p><i>Image2</i> applied to all other sides</p>	

box 2pics - 1 left - 2 other faces	A box for 2 images: <i>Image1</i> applied to left side <i>Image2</i> applied to all other sides	
box 2pics - 1 right - 2 other faces	A box for 2 images: <i>Image1</i> applied to right side <i>Image2</i> applied to all other sides	
box 2pics - 1 top - 2 other faces	A box for 2 images: <i>Image1</i> applied to top side <i>Image2</i> applied to all other sides	
cylinder - 2 pics - 1 front back - 2 top	A cylinder for 2 images: <i>Image1</i> applied to front & back sides <i>Image2</i> applied to top side.	
cylinder_lying - 2 pics - 1 front - 2 top bottom	A cylinder for 2 images: <i>Image1</i> applied to front side <i>Image2</i> applied to top & bottom sides.	


Shapes for 2 images (with transparency)

You can upload up to 2 images with the following shapes.

These shapes retain the image transparency that may exist in the uploaded image (consult [Image transparency](#)).

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

Shape name	Description	Shape showing image position
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alpha_plane_standing_sideways - 2 pics - 1 left - 2 right	<p>2 vertical planes for 2 images: <i>Image1</i> applied to left side <i>Image2</i> applied to right side.</p> <p>It has no edges along its thickness, but the specified width is still accounted for in planograms.</p> <p>You can use this for dividers or side panels which don't have a rectangular shape.</p>	
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Shapes for 4 images (no transparency)

You can upload up to 4 images with the following shapes.

These shapes disregard the image transparency that may exist in the uploaded image.

The list below is sorted alphabetically:


Shape name	Description	Shape showing image position
box 4pics - 1 front - 2 left - 3 right - 4 top	<p>A box for 4 images: <i>Image1</i> applied to front side <i>Image2</i> applied to left side <i>Image3</i> applied to right side <i>Image4</i> applied to top side.</p>	

Shapes for 6 images (no transparency)

You can upload up to 6 images with the following shapes.

These shapes disregard the image transparency that may exist in the uploaded images.

The list below is sorted alphabetically:

Shape name	Description	Shape showing image position
box 6pics - 1 front - 2 left - 3 right - 4 top - 5 back - 6 bottom	<p>A box for 6 images: <i>Image1</i> applied to front side <i>Image2</i> applied to left side <i>Image3</i> applied to right side <i>Image4</i> applied to top side <i>Image5</i> applied to back side <i>Image6</i> applied to bottom side.</p>	

Notes for all 3D shapes

- Each of the above shapes is resized in width, depth and height to match exactly your item overall dimensions.
- In the database editor, only the available Image fields are enabled depending on the assigned shape. For example, assigning the shape named **box** only enables the first **Image** field.
- If you have specified image(s), it (they) will be resized to fit onto the selected shape.
- For shapes with area(s) using a color, the color is white by default but can be specified per item. If you don't apply image(s), the image areas will be colored with the specified color value.
- If you can't read the entire assigned shape name in the collapsed drop-down list, you can display it in a tooltip by hovering your mouse pointer over the shape name.
- Even if you choose a language other than English for the user interface, the names of the 3D shapes remain based on English as listed above.

Custom 3D Shapes

If you need a different 3D shape not listed above, you can import your own 3D models. Consult instructions below.

Creating a 3D Model

In PlanogramBuilder, *3D shapes* are basically 3D models with only their geometric mesh. A shape can be used to generate several products or accessories by just changing the referenced image(s) and the dimensions of the item.

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

In your 3D modelling application, follow the below rules when creating a model to use as a PlanogramBuilder shape:

- **Supported file format:** *.3DS (Autodesk 3D Studio original DOS format).
- **Measurement unit:** the system units in 3ds Max should be set to **cm**, as this is used by PlanogramBuilder to import 3D models. If your model is in another measurement unit, convert it to cm.
- **Animation:** PlanogramBuilder doesn't support animation so you must remove all animation keys before exporting the 3DS file.
- **Geometry:**
 - Keep to a reasonable number of polygons as the 3D files will be used for real-time rendering. You can apply an *Optimize* or *MultiRes* modifier on the models to reduce the number of polygons.
 - Make sure to have clean models with welded vertices and no duplicated faces. In *3ds Max*, the *STL check* modifier check can be used to check model integrity.
- **Orientation:** make sure your model is oriented in such a way that its top is facing upwards, and its front is facing front, as you would like it to appear in a planogram.
- **Material types:** use only *3ds Max Standard* or *Multi/Sub-object* materials with *Blinn* or *Phong* shading. *Architectural* materials or *procedural* shaders are not supported.
- **Material opacity:** opacity / transparency values are supported for materials. PlanogramBuilder uses additive transparency so make sure to set your material to use this system to preview your material accurately before exporting the 3DS file.

- **Material name convention:** When you create 3D models for use as PlanogramBuilder shapes, special conventions for material names define how each material will be interpreted by PlanogramBuilder. This makes it possible for PlanogramBuilder users to assign their own color and images to items using a custom shape. Name each material applied to your 3D model as follows:
 - **color:** one material named *color* can be assigned to parts or all your 3D model. It will be interpreted by PlanogramBuilder so that the actual color can be specified by the user with the corresponding database property ([Color \(Item properties\)](#)). A material with this name doesn't support image maps in PlanogramBuilder, so it should only be assigned to the parts of your model which are a solid color.
 - **image1, image2, image3, image4, image5, image6:** one material each with one of these names can be assigned to parts or all of your 3D model. Each material will be interpreted by PlanogramBuilder so that users can assign their own image to each corresponding database property ([Image \(1 – 6\)](#)). The maximum number of such materials is six, one of each, corresponding to a maximum of six user assignable images in PlanogramBuilder.
 - **plano_keep:** All materials not using the above-listed names must be named with this prefix (e.g., *plano_keep glass*). Any number of such materials can be assigned to parts or all your 3D model. These materials are not editable in PlanogramBuilder, so users will not be able to modify them in the database. *Note:* The only image map allowed in such materials is a special environmental *reflection* map image always named [refmap.png \(click to download\)](#). You can download and use this special map within any such material if you wish to achieve reflective surfaces, like glass. You don't need to upload the *refmap.png* image since it is already available on our servers.
- **Supported image maps:** images can only be used to define *diffuse color* and *transparency* (both using the same image). Other map types such as *bump* or *reflections* are not supported by PlanogramBuilder to assign as [Image \(1 – 6\)](#).
- **UVW Mapping** coordinates for the diffuse maps (also optionally used as opacity map) must be applied to your geometry to match the result you want to achieve. You can apply *tiling* values in the *UVW Mapping* modifier. However, do not apply *tiling* or *offset* in the *material map* setting as this is not supported by the 3DS format.
- **3D file name convention:** if your 3D model is designed to support images with *alpha transparency*, you must name the exported *.3DS file with the prefix **alpha_** (e.g., *alpha_mySHape.3ds*). This prefix tells PlanogramBuilder that it should use the image alpha channel (when available in the image) to define the item opacity.

Saving a 3D Model

1. In 3ds Max, **select only the items to export:**
 - Geometries
 - Dummies if they are used to define object hierarchy.
 - Other types of items should not be selected: lights, cameras, 2D shapes, other gizmos.
2. In the **File** Menu, click **Export Selected**.
3. In the **Select File to Export** dialog, select the **3D Studio (*.3DS)** file type.
4. Type a name for the 3DS file. You can use long names up to 50 characters for the 3DS model. The file name will become the name of the item in PlanogramBuilder, so make sure to think about the desired correct name, especially since each shape must have a unique name.

Warning: do not save a 3D model named exactly as an existing standard PlanogramBuilder shape such as *box*, because this would overwrite the existing standard shape in PlanogramBuilder. The names of all standard shapes are listed in [Shape](#).

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

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

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

Importing a 3D Model

To import a new custom shape in PlanogramBuilder, you can either assign it to a new item or to an existing item. Consult [New item](#) or [Item selection](#) for details on these tasks.

In the instructions below, we create a new item using our above-mentioned sample model as the shape to import.

1. Click on **New item** in Database.
2. In **Item properties**, next to **Shape**, click on **Browse**.
3. Select ***steak-fries & drink.3ds*** on your computer and click on **Open**.
4. After the 3DS file has been uploaded, it appears in the PlanogramBuilder list of shapes. The new custom shape is now available to all users in your accountID. You can reuse it for any number of items in the database. You don't have to import the 3D model again once it is in the list of available shapes.
 - If you don't want to create an item at this point, click on [Cancel \(database item\)](#) below the item properties. The new custom shape will still remain in the list of shapes.
 - If you want to create the item in the database at this point, define its details under **Item properties**, then click [Create \(database item\)](#) or [Apply \(database item\)](#).

Below is an example of a product created with our sample 3D model.

- [Color \(Item properties\)](#), which applies to the plate, was set to white (#FFFFFF)
- **image1** was assigned *steak.png*.
- **image2** was assigned *fries.png*.
- **image3** was assigned *cola.png*.



Below is another or modified example of a product created with our sample 3D model.

- [Color \(Item properties\)](#), which applies to the plate, has been set to a dark gray (#232323).
- **image1** was assigned *steak.png*.
- **image2** was assigned *fries.png*.

- **image3** was assigned *apple juice.png*.

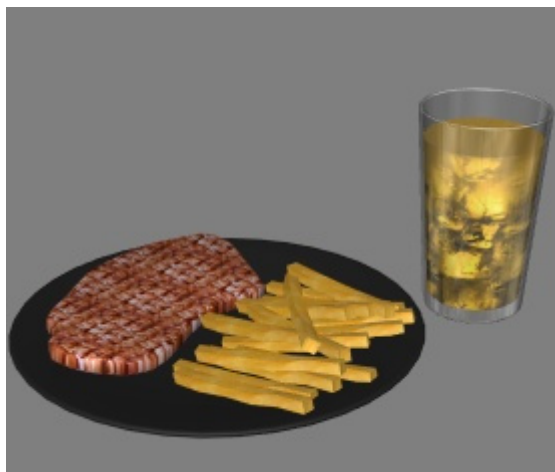


Image (1 – 6)

One or more images (up to 6) applied to the item to achieve a more realistic look.

The exact number of images you can apply depends on the shape assigned to the item, which you should choose accordingly (consult [Shape](#)). Image fields that are not available because of the item shape are grayed out.

- Supported values: file name and extension in supported format (*jpg, png, bmp, gif, tif*)
- Default value: empty (= none)
- Example: *Body wash - avocado - flacon - 500g.png*

Instructions:

1. Click on **Browse**.
2. Select the desired image file on your PC.
3. Wait for the image to upload to the database. Progress is shown on the status bar as a percentage value.
4. Click on [Create \(database item\)](#) to see the result (or click on [Apply \(database item\)](#) if you are updating the item).
5. Repeat these steps for all available image fields.

To upload images for multiple items in a single operation, consult [Import list + images](#).

Note: Images are not compulsory. If you don't apply a picture, the product will have a uniform color (which you can define with [Color \(Item properties\)](#)), and its name will be printed on the product front if it uses the shape named **box**.

Image transparency

Images with a transparent background let you obtain a realistic look by showing only the object, and hiding the background area of the image. This is especially useful for unpackaged products when there is no appropriate 3D shape. Transparency is only applied to the item if both its shape AND its image(s) support transparency, as listed below:

- Shapes supporting transparency:
 - [Shapes for 1 image \(with transparency\)](#)
 - [Shapes for 2 images \(with transparency\)](#)
- Image file formats supporting transparency:

- *png* and *tif* in 32-bit color: 256 levels of transparency (alpha channel).
- *png* and *gif* in 8-bit color: 1 transparent color.

Maximum image file size: 5 MB. Bigger files won't be uploaded.

Maximum pixel count: images are automatically downsized by PlanogramBuilder if larger than 786'432 pixels (=1024 x 768 or 500 x 1573 for example). Uploading larger images does therefore not provide better quality. Ideally, use images which pixel resolution is just large enough to distinguish the desired details such as the text on the product or packaging.

Choosing the right product view(s)

- For shapes with 1 image, take a picture of the product's most representative face (usually the front face).
- For shapes with multiple images, take pictures of the product on other sides according to the chosen shape documentation.

Taking the pictures

- Don't turn on your camera flash as it creates bright hotspots on the photo.
- Take the picture straight on, not from an angle.
- Ideally, don't use a wide-angle lens (i.e.. smartphone) as it distorts objects.

Cropping your images

- **Auto-crop:** if your images have a transparent background as explained above, PlanogramBuilder performs an automatic crop to remove the unwanted area surrounding the product. Please note that the auto-crop feature works with any 3D shape, even with shapes that don't support transparency: in this case, the image will be cropped but it's background will display as opaque.
- **Manual crop:** images that don't have a transparent background should be cropped manually to the outer limits of your product (i.e., the image must be cropped so that the outline of the product touches the 4 outer edges of the image). Consult the image examples below.

Example pictures

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



Bad picture: it is skewed because it was taken from an angle.



Bad picture: the unwanted extra space in image around product will not be automatically cropped because this image has no transparency.



Good picture: the unwanted extra space in the image around the product will be automatically cropped because it is transparent.



Good pictures: the product is seen straight from the front and the image is cropped at the outer bounds of the product.



Good picture: the product is seen straight from the front and the image is cropped at the outer bounds of the product.

Color (Item properties)

This property lets you specify a uniform color for each item in the database.

The color has the following effect on items:

- The specified color is applied to the areas mentioned in the description of the chosen shape (consult [Shape](#)).
- The specified color is applied to the whole item if no image is specified for the item.
- The color is also applied in [Schematic view](#) when [Product style](#) is set to **Box & label**.

In all cases, the color can be specified as follows:

- Supported values: HTML color codes (with or without the # prefix, not case-sensitive). Complete reference of these HTML color codes can be found for example at:
 - www.google.com/search?q=colorpicker
 - www.colorpicker.com/
 - html-color-codes.info/.
- Default value: empty (= #FFFFFF) (white)
- Example: #FF8000 (orange)

When creating or editing an item directly in the Database task, the color can also be picked as follows:

- **Color swatch:**
 - a. Click on the color swatch next to **Color** to display the color palette
 - b. Select the desired color.
 - c. Click OK.
- **Color Picker:**
 - a. Click on the color picker icon next to **Color** to activate the tool.

- b. Pick any color from the 3D item in the preview area.
- c. While pressing your mouse button over any area with the color picker, the color swatch is updated with the selected color.
- d. Release your mouse button to apply the color.

Note: the color picker tool remains active until you click on another tool such as **Zoom**.

Values set in DB & changeable in planograms

The lower part of this pane contains the item properties which values are defined in the database, but that can be overridden per item in planogram projects. This provides flexibility for property values that are not always the same depending on the situation.

Typically, you will set these property values in the database to match the most common values (if any) for each item or leave empty values otherwise.

For example, you will set the behavior of a product to **pegged** in the database if it's usually placed on hooks, but you can override this behavior for any product in a planogram by changing it to **standard** in case you need to place the product on a shelf. (Consult [Item Info](#) to learn how to override these properties per facing.)

Each property is described below.

Behavior

This property defines how each item is placed onto shelves and fixtures.

PlanogramBuilder provides various behaviors to match typical placements of products and accessories. Choose the behavior which corresponds to the most often-used placement mode for the selected item.





- Supported values: consult lists below
- Default values:
 - for products:
 - In spreadsheets: empty cell (= *standard*)
 - In GUI: *standard*
 - for accessories:
 - In spreadsheets: empty cell (= *panel*)
 - In GUI: *panel*
- Example: *pegged*

The following values are available:

Product behaviors

Four types of products can be used in PlanogramBuilder:

Behavior	Description	Example
----------	-------------	---------

Behavior	Description	Example
pegged	<p>A pegged product.</p> <p>It hangs on pegs and is repeated along the length of the peg.</p> <p>Use this behavior for any product which is most often placed on hooks (e.g., blister packs).</p>	
stackable	<p>This is the same as standard products except it can be stacked onto different products which also have the stackable behavior.</p> <p>Use this behavior for products which must often be stacked on or below different products (e.g., large dog food bags with variations that must share the same shelf space to gain room).</p> <p><i>Note:</i> a stacked product is centered laterally on the product below, so it is best suited for stacking different products of the same width.</p> <p>Warning: do not use this behavior if you want to create vertical piles of the same product. In this case consult Facings high.</p>	
standard (default value)	<p>A standard product.</p> <p>It sits on shelves and can be repeated to fill the shelf depth.</p> <p>Use this behavior for any product which is most often placed on shelves (e.g., bottles of soda).</p>	
tester	<p>A tester product.</p> <p>It sits on shelves and only one product is placed at the front edge of the shelf. You can place standard products behind it.</p> <p>Use this for out-of-box products placed in front the packaged version of the same product (e.g., perfume testers)</p>	


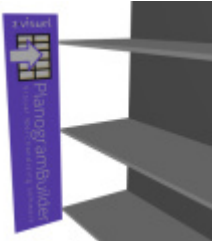



Tip: For products that are sometimes placed differently depending on the available shelving, you can later override the database behavior per item in any planogram (consult [Item Info](#)).

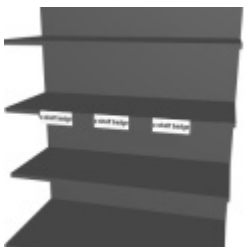
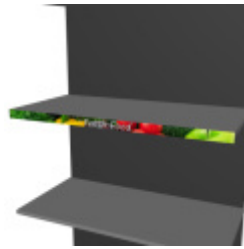
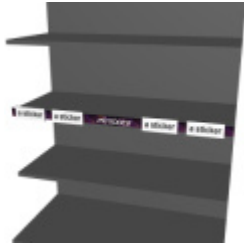

Note: Even if you choose a language other than English for the user interface, the names of the behaviors remain as listed above.

Accessory Behaviors

Several types of accessories can be created in PlanogramBuilder:

Behavior	Description	Example
----------	-------------	---------

bay header	<p>An accessory which snaps to the top of any back panel.</p> <p><i>Note:</i> if the bay has no back panel, you cannot place a header. In this case we suggest creating a small back panel as a crossbar to support your desired header.</p> <p>Use this to place header panels above your back panels.</p>	
divider	<p>An accessory which automatically snaps to the front edge of a shelf.</p> <p>Use this to create lateral shelving divider signs for example.</p> <p><i>Tip:</i> the following shape is well suited to this type of objects:</p> <p>box_sides. Consult Shapes for 1 image (no transparency)</p>	
ondisplay	<p>An object which can be placed on any shelf without being duplicated in depth.</p> <p>Please note that this is typically applied to custom products displayed out-of-box (on-display).</p>	
panel (default value)	<p>An accessory which snaps onto the back panels of any shelving.</p> <p><i>Note:</i> if the bay has no back panel, the panel can be positioned between the lowest and highest shelves.</p> <p>Use this to create posters, back cards or any other hanging POS.</p>	
presenter	<p>An accessory which is placed on the shelf and onto which you can place another accessory with the behavior: ondisplay.</p> <p>Use this to create stands to present out-of-box products.</p> <p><i>Note:</i> An accessory placed on presenter always sits at the same height as the shelf. So, this accessory is only suitable for stands which have a very thin platform for placing an out-of-box.</p>	

Shelf badge	<p>An accessory which snaps to the front edge of any shelf at 3 possible predefined positions: left, center, right.</p> <p>Use this to create shelf cards / shelf badges.</p>	
Shelf strip	<p>An accessory which snaps onto the front edge of any shelf. It is horizontally centered and aligned to the top of the shelf.</p> <p>Use this to create single shelf strips.</p>	
sticker	<p>An accessory which snaps to the front of a shelf or shelf strip at any lateral position.</p> <p>Use this to create cards, typically used to show information or specials.</p>	
tag	<p>A box which can be placed on the front edge of a shelf as a label for the actual product name, pricing or other text (no image).</p> <p>Tags have dedicated parameters:</p> <ul style="list-style-type: none"> • Caption • Text height • Text color (Item properties) <p>Consult the above links for each parameter.</p>	
shape defined	<p>This is a special behavior to use only if you have been instructed to.</p>	

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

Collisions (Item properties)

This property enables or disables collision detection for the item.

- Supported values:
 - **Yes** (checkmarked in the GUI): the item will collide with other items.
 - **No** (not checkmarked in the GUI): the item will be able to overlap other items in the planogram. Typically, it can be necessary to disable collisions for items that have overhanging parts or are slanted sideways. This will allow placing them adjacent.
- Default value: **Yes** (= Checkmarked in the GUI)

Note: The value of this property has no effect if [Collisions \(Settings\)](#) is not checkmarked.

Tip: you can later override this database value per item in any planogram (consult [Item Info](#)).

Note: In spreadsheets, when batch importing or exporting items, you can still use our previous notation system for these values: **1** for Yes, **0** for No.

Facings deep

Only applicable to products.

The number of the same products placed adjacent in depth on a shelf or peg, if there is enough space to fit this quantity.

If there are multiple units of the product, they form a block which is treated as one object in PlanogramBuilder.

- Supported values: numeric value [0-150], empty, *auto*
- Default value: empty cell (= *auto*)
- Example: 5



Example: a product with 5 Facings deep

If you leave the value empty or set it to *auto*, the depth of the underlying shelf or the length of the peg automatically determines how many times the product is repeated along the depth axis.

If the value specified in the database exceeds the number of products that can fit on the shelf depth or on the peg length in the current project, the quantity of items actually placed is automatically reduced to fit in the available space. Note that in this case, the value defined in the database is still shown in **Item Info**, so that the correct number of items will be placed if you increase the available space.

Tip: you can later override this database value per item in any planogram in (by specifying a value in **Item Info** or with the mouse in **Adjust product quantity**).

- Keyboard shortcuts when adjusting values in the currently opened project:
 - Decrement the number of Facings deep: **Minus (-) on numpad**
 - Increment the number of Facings deep: **Plus (+) on numpad**

Width gap

Only applicable to products.

The horizontal gap between the products when multiple [Facings wide](#) are used.

- Supported values: positive/negative numeric value [+0-9 and decimal point] (based on [Measurement unit](#))
- Default value: empty (= 0)
- Example: 0.3

Note: For a product pegged on peg board panels, the value entered corresponds to the minimal gap: the product will be placed on the nearest hook guaranteeing this minimal gap.

Tip: you can later override this database value per item in any planogram (consult [Item Info](#)).

Height gap

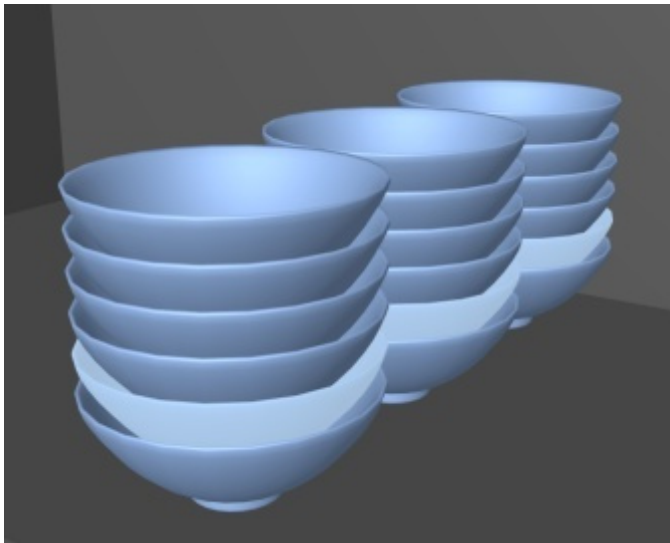
Only applicable to products.

The vertical gap between the products when multiple [Facings high](#) are used.

- Supported values: positive/negative numeric value [+0-9 and decimal point] (based on [Measurement unit](#))
- Default value: empty (= 0)
- Example: 2

Note: For products pegged on peg board or slat panel panels, the value entered corresponds to the minimal gap: the product will be placed on the nearest hook guaranteeing this minimal gap.

Tip: This parameter is also very convenient if you want to represent products nested in a pile. In this case, enter a negative value corresponding to the amount of space the product should be nested inside the one below. E.g., enter -3 for a bowl which is nested 3 units inside the bowl below itself.



Example of bowls nested using a negative value

Tip: you can later override this database value per item in any planogram (consult [Item Info](#)).

Depth gap

Only applicable to products.

The depth gap between the products when multiple [Facings deep](#) are used.

- Supported values: positive/negative numeric value [+0-9 and decimal point] (based on [Measurement unit](#))
- Default value: empty (= 0)
- Example: 1.25

Note: For products pegged on peg board or slat panel panels, the value entered corresponds to the minimal gap: the product will be placed on the nearest hook guaranteeing this minimal gap.

Tip: This parameter is convenient if you want to represent products nested in depth, such as plate. In this case, enter a negative value corresponding to the amount of space the product should be nested inside the one behind it. E.g., enter -1.2 for a plate which is nested 1.2 units inside the plate behind itself.

Tip: you can later override this database value per item in any planogram (consult [Item Info](#)).



Example of products spaced with 3 cm value

Lateral offset (Item properties)

Applicable only to pegged products.

The left or right offset position of pegged products. This is convenient when the product hanging tab is not centered on the product.

- Supported values: positive/negative numeric value [+0-9 and decimal point] (based on [Measurement unit](#))
- Default value: empty (= 0)
- Example: -1.2

Usage:

- value of 0 = the product is centered on the peg hole
- positive values = offset the product right

- negative values = offset the product left

Note: The offset can be previewed in database editor if [View peg hooks](#) is checkmarked.

Tip: you can later override this database value per item in any planogram (consult [Item Info](#)).

Vertical offset

Applicable only to pegged products.

The vertical offset position of pegged products. This is convenient to adjust the exact product hanging hole vertical location.

- Supported values: positive/negative numeric value [+0-9 and decimal point] (based on [Measurement unit](#))
- Default value: empty cell (= -1 cm, -10 mm, 0.1 m, -0.39 inches; according to [Measurement unit](#))
- Example: -1.6

Usage:

- empty value = the peg hole is offset below the top edge of the product by the default value.
- value of 0 = the product top edge is aligned to the peg hole on the back panel
- positive values = offset the product up
- negative values = offset the product down

Note: The offset can be previewed in database editor if [View peg hooks](#) is checkmarked.

Tip: you can later override this database value per item in any planogram (consult [Item Info](#)).

Caption

Applicable only to accessories with Behavior: [tag](#)

The text to display on the selected tag.

- Supported values:
 - text strings, including Unicode characters for non-Latin text values (e.g., *On Sale*)
 - *[br]*: displays a line break
 - *[rp]*: displays the retail price (tax incl.) of the product placed closest to the tag. The price value is taken from the spreadsheet imported in the Price list file. Products with missing prices are labeled N/A.
 - *[position]*: displays a number reflecting the value of **Position** for the product nearest to the tag. The number helps identifying the product position and has the same value as [Position](#) in [Project item list](#).
 - *[reference]*: displays the value of [Reference](#) for the product nearest to the tag.
 - *[name]*: displays the value of [Name \(Item properties\)](#) for the product nearest to the tag.
 - *[Item custom properties [1 – 12]]*: displays the value of the corresponding custom property for the nearest product. Replace *Item custom properties [1 – 12]* by the actual property name you defined in the settings. E.g., *[Weight]*
 - any combination of the above values
- Default value: empty (= none)
 - Example: *On Sale [br] 20% OFF [br] [name]*

Note: Make sure to type the square brackets when applicable.

Tip: you can later override this database value per item in any planogram (consult [Item Info](#)).

Text height

Applicable only to accessories with Behavior: [tag](#)

The caption height of the selected tag.

- Supported values: positive numeric value [0-9 and decimal point] (according to [Measurement unit](#))
- Default value: empty (= 0) (automatic text height)
- Example: 0.3

With an empty value or a value of 0, the text height is calculated automatically based on the item height.

Tip: you can later override this database value per item in any planogram (consult [Item Info](#)).

Text color (Item properties)

Applicable only to accessories with Behavior: [tag](#)

The color of text captions for the selected tag.

- Supported values: HTML color codes (with or without the # prefix, not case-sensitive). Complete reference of these HTML color codes can be found for example at:
 - www.google.com/search?q=colorpicker
 - www.colorpicker.com/
 - html-color-codes.info/
- Default value: empty (= 000000) (black)
- Example: #0000FF (blue).

When creating or editing an item directly in the Database task, the color can also be picked as follows:

- **Color swatch:**
 - a. Click on the color swatch next to **Text color (Item properties)** to display the color palette
 - b. Select the desired color.
 - c. Click OK.
- **Color picker:**
 - a. Click on the color picker icon at the right of the color swatch to activate the tool.
 - b. Pick any color from the 3D item in the preview area. While pressing your mouse button over any area with the color picker, the color swatch is updated with the selected color.
 - c. Release your mouse button to apply the color.

Note: the color picker tool remains active until you click on another tool such as **Zoom**.

Tip: you can later override this database value per item in any planogram (consult [Item Info](#)).

Tile

Only applicable to materials.

This parameter determines how the material image is applied onto elements.

- Supported values:
 - **Yes** (checked in the GUI): the material image is tiled (repeated) on the element when applied.
 - **No** (not checked in the GUI): the image is stretched to cover the room element when applied.
- Default value: *Checked*

Tip: you can later override this database value per item in any planogram (consult [Item Info](#)).

Item commands

The following commands are accessible as buttons below the item properties.

They are used to apply or cancel changes made to the item properties.

Create (database item)

This command finalizes the creation of the item with all the values entered and the choices made under **Item properties**.

Consult [New item](#) for complete instructions.

Apply (database item)

This command updates the selected item(s) with all the values entered and the choices made under **Item properties**.

Tip: The process described below is for modifying items directly in the user interface. Another feature, [Import list + images](#), lets you to update batches of items and is much quicker when you need to modify several items with different values in one shot. Also note that mixed usage of editing items in the user interface and batch importing is not a good idea. It can lead to discrepancies between your database content and your local file content, making it complicated to synchronize item updates.

Instructions:

1. On the left of **Database item list**, expand **Content choice** if it's collapsed.
2. Under **Type of items**, click on a radio button to choose *materials*, *products* or *accessories*.
3. Select the item(s) you want to modify in the list. Use [Item filters](#) to help.
4. Under [Item properties](#) on the right of your screen, change the properties of your item(s).
5. Once you have entered all the desired values:
 - Click on **Apply (database item)** to validate the modifications on your item(s). (You can also press **Enter** on your keyboard.)
 - Otherwise, if you have changed your mind and don't want to apply the modifications, you can click on [Cancel \(database item\)](#) (or the **Escape** key).
6. If your modifications apply to more than one item, a pop-up message will appear. Click **OK** to confirm that you want to update the selected items.
7. After updating, the item(s) will be re-generated in 3D. This may take some time if you are uploading an image.
8. You can see your updated item(s) in [Item preview](#) by selecting one item at a time.

9. Your item(s) is(are) also updated in the following PlanogramBuilder areas:

- Saved [Projects](#)
- [Database item list](#)
- [Catalog of products](#)
- [Catalog of accessories](#)
- [Materials](#).

Note: If the updated item(s) is(are) present in the currently opened planogram, you must save, close and re-open this project to reflect the item modifications.

Cancel (database item)

This command cancels creation of an item or change(s) made under [Item properties](#) if you haven't yet clicked on [Create \(database item\)](#) or [Apply \(database item\)](#).

Delete (database item)

This command deletes the selected item(s) from the database.

Use this command to remove items from the database when they should no longer be used in planograms. Use great caution when deleting items, as it will permanently remove the item(s) for all users in your company.

Notes:

- To minimize accidental deletion, a pop-up message will appear as a warning. Click **OK** to confirm deleting the selected item(s).
- This command is the only method to delete items from the database. Items cannot be deleted with [Import list + images](#) or [Import list](#).

Tip: in some cases, you may want to just disable items rather than deleting them from the database. Consult [Enabled](#) for instructions.

Item preview

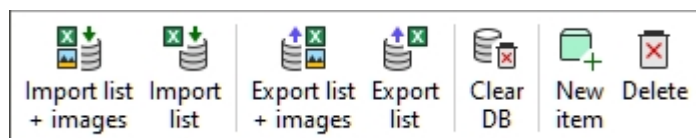
If a single item is selected in the database list, this pane shows an interactive preview of the item as stored in the database in its current state.

You can adjust the preview with the tools and commands in [Navigation](#).

Note: If you have made some changes to an item properties, you must first click on [Create \(database item\)](#) or [Apply \(database item\)](#) to validate the changes and update the preview.

Tools and commands (Database)

Several commands are available to manage your database.



PlanogramBuilder provides 2 methods to manage items in your database:

1. Add items one by one with the command named [New item](#) and define their characteristics directly in the built-in database editor in [Item properties](#). This method is suitable if you have

only a very limited set of products and accessories. It is also advised to use this method temporarily when you start using the application to get familiar with the database and the various item properties.

2. Add or update items and their characteristics from a spreadsheet file with [Import list + images](#) or [Import list](#). This method is advised if you have many materials, products, or accessories because you can add or modify multiple items in one operation.

After you have learnt both above methods, we advise using either method 1 or method 2, but not mixing both as this could lead to discrepancies between your database content and your local file content, making it complicated to synchronize item updates.

The database toolbar also includes commands to [Clear DB](#) and to export ([Export list + images](#), [Export list](#)) your database to local files on your PC for backup.

Consult the description of each command in the section below.

Import list + images

Note: Only available to [PlanogramBuilder Administrator](#)

Video tutorial on this topic: [9: Batch importing items in the database](#)

This command lets you add and update items in your database from a spreadsheet file and images on your PC.

Use this command when you want to either:

- Add new items to your database, including images of the items.
- Update existing items in your database and re-upload their images. For example, if some product images have changed.

Before adding items to the database, make sure to configure the following application parameters will affect your database:

- [Language](#)
- [Measurement unit](#)
- [Item classification properties](#)
- [Item custom properties \(Settings\)](#)

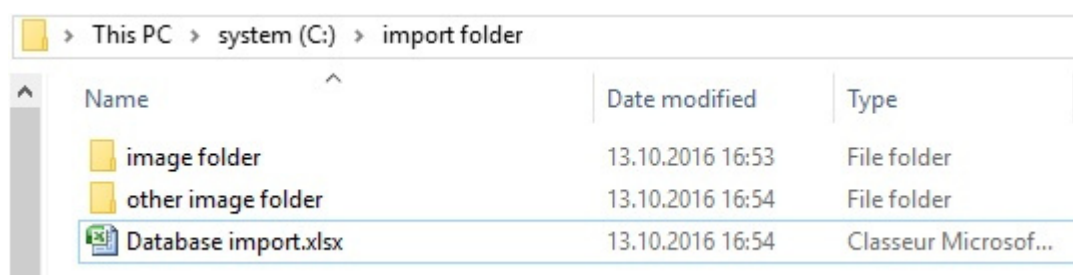
Instructions:

1. If you are preparing your first spreadsheet for import, start by exporting your existing database ([Export list + images](#)) from PlanogramBuilder to obtain a template file with the proper columns and examples of values.
2. Open in a spreadsheet program the file saved at step 1.
3. It contains one line per material, product or accessory, and a column for each item property. Please consult [Item properties](#) for a description of all the available properties.

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

Example of spreadsheet for import

1. If you omit some columns or leave values empty for properties which are not compulsory, default values will be applied to the item upon import.
2. To import accessories or materials, the column named **Back panel type** must be present in the spreadsheet with the correct values per item. Consult [Type \(Item properties\)](#).
3. To upload images onto your items, proceed as follows:
 - Consult [Image \(1 – 6\)](#) for instructions on preparing your images.
 - Type only the image filename and extension in the corresponding image column (e.g., *myimage.png*). *Note:* if you insert only the image filename without its extension, PlanogramBuilder will try to automatically find your image with a supported format in the following order: *png, jpg, jpeg, jpe, jfif, bmp, tif, tiff, gif, tga, ico*.
 - Copy all the referenced image **files** in the folder or a sub-folder of where you saved the spreadsheet file. *Note:* as an alternative to copying all the images, if your images are already in a folder on a different path on your computer (but not on a network), you can create a shortcut to your existing image folder in the folder where the Excel file is located. This step is important as otherwise PlanogramBuilder won't be able to upload the images.



Example of suggested folder structure for database import with images

4. Save your spreadsheet as an **Excel file (*.xls or *.xlsx)**, or if you can't save as Excel files from your application, save as a **Unicode Text file (*.txt)**.
5. In PlanogramBuilder, **Database**, click on **Import list + images**, then select the spreadsheet file you have prepared and wait for all items to be generated. PlanogramBuilder will also automatically find and upload the referenced images to the database upon import and create the 3D models using these images.
6. The status bar shows the upload progress.
7. Once finished, a popup message shows a summary of what was imported, as well as the average upload speed for batches of 5 MiB and larger.
8. Your items are now shown in the following panes according to their respective type:
 - [Database item list](#)
 - [Catalog of products](#)
 - [Catalog of accessories](#)
 - [Materials](#)
9. If you updated one or more items, they are also updated in your existing saved [Projects](#). *Note:* If the updated items are present in the currently opened planogram, you must save, close and re-open this project to reflect the item modifications.

Tips:

- You can cancel **Import list + images** by clicking on its icon when a batch image upload is going on.
- Once you have successfully tested batch importing some items, we advise to [Delete the sample items](#) provided by zVisuel.

- You can use as many spreadsheet files as you want as sources for importing. Each spreadsheet can then be imported separately to add or update only some items in the database. For example:
 - You may split your products by category or by brand, each in a separate spreadsheet list to facilitate managing products.
 - You can create a new separate spreadsheet, containing only the new items to add at each import operation to avoid reimporting the items already in your database.

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

- If you want to save the file as native Excel files (xls orxlsx), set the cells containing such numbers to *text* so your item Reference will be displayed correctly.
- If you want to save the file as Unicode text, you can add a number sign [#] as a prefix to an item *Reference*. PlanogramBuilder then automatically removes the first character upon import if it's a [#] so your item Reference will be displayed correctly in PlanogramBuilder.

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

Notes:

- The header name of each column in your spreadsheet must match exactly each available property in database editor.
- If you have set the language of the user interface to a language other than English, the names of the database properties are displayed in the language you chose. When importing, you must also name your source spreadsheet column headers as they appear in your language in the database interface.
- You can use non-Latin characters for most text entries. For example, you can enter product names in Greek language. Consult Item properties to find out which text columns support Unicode characters.
- The order of the columns in your spreadsheet does not matter for importing, as the importer compares the header values to match columns.
- Consult the related sections for help on defining the names of [Item classification properties](#) and [Item custom properties \(Settings\)](#).
- You can force a measurement unit for the dimensions of your items by adding the unit abbreviation within square brackets after the header. Here are the 4 possible options:
 - **No unit specified** (example: *Width*). The unit used for import will be the current PlanogramBuilder unit. Consult [Measurement unit](#) for details on this setting.
 - **[mm]** (ex. header: *Width [mm]*). The product width will be interpreted as millimeters.
 - **[cm]** (ex. header: *Width [cm]*). The product width will be interpreted as centimeters.
 - **[inch]** (ex. header: *Width [inch]*). The product width will be interpreted as decimal inches.
 - **[m]** (ex. header: *Width [m]*). The product width will be interpreted as meters.
- Color values are specified using the corresponding HTML color code. Consult [Color \(Item properties\)](#).

Rule to determine if an item will be added or modified:

For each item listed in your spreadsheet, the value of [Reference](#) determines if the item will be added or updated:

- If the imported value of **Reference** cannot be found in your PlanogramBuilder database, a new item will be created.
- If the imported value of **Reference** already exists in your PlanogramBuilder database, the item will be updated to match the values from your spreadsheet.

Rules for missing columns:

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

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

Example: Update the names of several items that are already in the database by simply importing a spreadsheet with two columns: **Reference**, **Name**. Even if using **Import list + images**, the existing images won't be changed or deleted since there is no column named **Image (1 – 6)**.

Rules for empty cells:

If you leave some empty cells for an item under the columns of your input file:

- If a default value is documented in [Item properties](#) for the corresponding property, the existing database value is overwritten by the default value.
- If no default value is documented, the existing database value is overwritten by an empty value.

Examples:

- Import new items from a spreadsheet with empty cells under **Behavior**. This will set all items to their default value for [Behavior](#).
- Use **Import list + images** to remove images from one or several products by importing a spreadsheet with empty cells for the desired items under the *Image* column(s). The images will be removed for the items which have empty image cells.
- Use **Import list + images** to update images of products by importing a spreadsheet with new images referenced under **Image (1 – 6)**. All images referenced in your file will be re-uploaded. *Tip:* If you only want to update images of some products, don't put empty cells because this would remove the images from the corresponding products. Instead, create an input file with only the lines for products that need updated images.

Import list

Note: Only available to [PlanogramBuilder Administrator](#)

This command lets you add or modify multiple items in your database in one shot. It performs the same function as **Import list + images**, but without uploading images of your items. Any image column (1 - 6) present in your input spreadsheet file is simply ignored.

Use this command when you want to either:

- Add new items to your database if you don't have images of the items. Note that you will still be able to import images later by updating the items with **Import list + images**.
- Update existing items in your database without re-uploading their images. For example, when you just want to change some item names or custom property values.

Example: Update several database item properties such as name, category or dimensions without re-uploading the item images. With this command, the existing images won't be re-uploaded nor removed from the database.

Consult [Import list + images](#) for details and instructions on this command since it is the same except for images.

Export list + images

Video tutorial on this topic: [8: Exporting the database](#)

This command exports the list of all your materials, products and accessories, including their properties. This also exports all images stored in the database to your computer.

Use this command:

- To create a full backup of your database. We strongly advise doing regular backups so you can recover your database in case you have accidentally cleared it or deleted items.
- To obtain template files with the correct format and folder structure for [Import list + images](#). We strongly advise taking this step before your first batch import.
- To re-synchronize your local PC source files with the most current database state. This is useful if you made manual item modifications and image uploads in [Item properties](#) after you last batch import.

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

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

Instructions:

1. Click on **Export list + images**.
2. In the dialog box, browse to the folder where you want to save the exported database. *Tip:* choose an empty folder or creating a new folder to avoid the exported files getting mixed-up with other existing files on your computer.
3. Choose the file type
4. Type a filename.
5. Click on **Save**.
6. Wait for all the files to finish downloading onto your computer. The first exported file is the listing of items, which is very fast to download, then the images. The status bar shows the download progress.
7. Once finished, a popup message shows a summary of what was exported, as well as the average upload speed for batches of 5 MiB and larger.

Tips:

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

Notes:

- The images are saved in a new folder named **images**. Images can take a long time to export depending on the number of images, their size and the speed of your Internet connection.

- The dimensions of your items (width, depth and height) are exported in the current active measurement unit. Consult [Measurement unit](#) for details on setting this preference.

Export list

This command exports the list of all your materials, products and accessories, including their properties, from your PlanogramBuilder Database to your computer. It performs the same function as **Export list + images**, but without saving the images of your items.

Use this command to export your database when you don't need the images, typically in case you already have all the current database images of your items on your PC.

Consult [Export list + images](#) for details and instructions on this command since it is the same except for images.

Clear DB

This command deletes all the database content: all your materials, products and accessories.

Notes:

- Only available to [PlanogramBuilder Administrator](#)
- Only available if [Allow clear DB](#) is checkmarked in the application settings.

Instructions:

1. Checkmark **Settings** > [Allow clear DB](#).
2. Click on **Clear DB**.
3. Then confirm by clicking **OK**.
4. Once completed, your database is completely empty.

Warning: All products and accessories and materials except the predefined materials will be permanently deleted from the database and cannot be recovered after this operation. Make sure to at least back up your database before clearing the database. Please consult [Export list + images](#) for instructions to back-up.

Tip: If you have recently started using PlanogramBuilder and you have finished testing the application with the sample products provided with the application, we advise clearing the database before adding your own products. This will avoid mixing up the sample products with your own products. You can also [Delete the sample projects](#) provided with PlanogramBuilder.

New item

Note: Only available to [PlanogramBuilder Administrator](#)

Video tutorial on this topic: [5: Adding your first product to the database](#)

Video tutorial on this topic: [6: Adding products of various shapes to the database](#)

Video tutorial on this topic: [7: Adding accessories to the database](#)

This command creates a single new item in your database. The type of item created depends on your current choice of **Type of items**: *Materials*, *Products* or *Accessories*.

Use this command in the following cases:

- To learn using the database and get familiar with [Item properties](#).
- To add items one by one if your database has a very small number of items.

In all other cases, we suggest rather using [Import list + images](#) to add several items quickly. Mixing both the single item and the batch import method is not a good idea as it can lead to discrepancies between your database content and your local file content, making it complicated to synchronize item updates.

Before adding items to the database, make sure to configure the following application parameters since they will affect your database:

- [Language](#)
- [Measurement unit](#)
- [Item classification properties](#)
- [Item custom properties \(Settings\)](#)

We also advise to [Delete the sample items](#) provided with the application before adding your own items.

Instructions:

1. On the left of the database list in **Content choice**, set **Type of items** to match what you want to create: *Material*, *Product* or *Accessory*.
2. Click on **New item**.
3. Under **Item properties** on the right of your screen, define the properties of your new item. Please consult [Item properties](#) for a detailed description of each available property. *Tip:* If you have activated one or more [Item filters](#), the values used by the filter(s) will be automatically pre-filled for the new item in the corresponding text field. You can however overwrite the pre-filled values by typing any other text.
4. Once you have entered all the desired values, click on [Create](#) below the properties to validate the creation of your new item. (You can also press **Enter** on your keyboard.) Otherwise, if you have changed your mind and don't want to create the new item, click on [Cancel \(database item\)](#) (or the **Escape** key).
5. Your items are now shown in the following panes according to their respective type:
 - [Database item list](#)
 - [Catalog of products](#)
 - [Catalog of accessories](#)
 - [Materials](#).

Tip: For materials, when filling-in its properties, first *Browse* for the image of your material. The following fields will be automatically filled with the image file name: **Reference**, **Name**.

Delete (database item)

Note: Only available to [PlanogramBuilder Administrator](#)

Deletes the item(s) selected in the list.

- Keyboard shortcut: **Del**

A confirmation message box will pop up to confirm deletion.

Warning: deleted items cannot be recovered unless you had previously made a local backup of the database with [Export list + images](#).

Database API

The database API allows developers of applications to interact with a PlanogramBuilder database for exporting data, importing data or both.

Typically, this lets you develop an ad hoc exchange mechanism between your PlanogramBuilder database and your ERP or similar internal systems.

The API provides all methods necessary to achieve from third party code the same results than when using the Database task in PlanogramBuilder.

The documentation for the API is available as a separate PDF document: [PlanogramBuilder API Reference Guide.pdf](#). The documentation provides all necessary information to use the API, as well as links to examples in Postman and C# / .NET.

View

This section describes the tools and commands to control the display of interface elements and planograms on screen.

Tools and commands (View)

The toolbar includes the following buttons:



They are also available in **Main Menu > View**:

Project item list	L
Reset panes	
Schematic view	V
Font size	
Highlight overlaps	
View the room	
View front panels	
View peg hooks	K
View dimensions	D
View edges	E
View flow direction	
View grid	G
Orthographic view	H
Stereo vision	
Stereo effect strength	
Lighting intensity	
Lighting direction	
Full screen	F11

Project item list (View)

Toggles displaying the list of products and accessories in your current planogram. Consult the description of this pane in the dedicated section: [Project item list](#).

- Keyboard shortcut: **L**
- Supported values:
 - *Pressed (checkmarked)*: [Project item list](#) is displayed on screen.
 - *Not pressed (not checkmarked)*: [Project item list](#) is not displayed.
- Default value:

- In the task named **Publish**: *Pressed (checkmarked)*
- In other tasks: *Not pressed (not checkmarked)*

Note: The list can also be closed by clicking on the cross icon in its upper right corner.

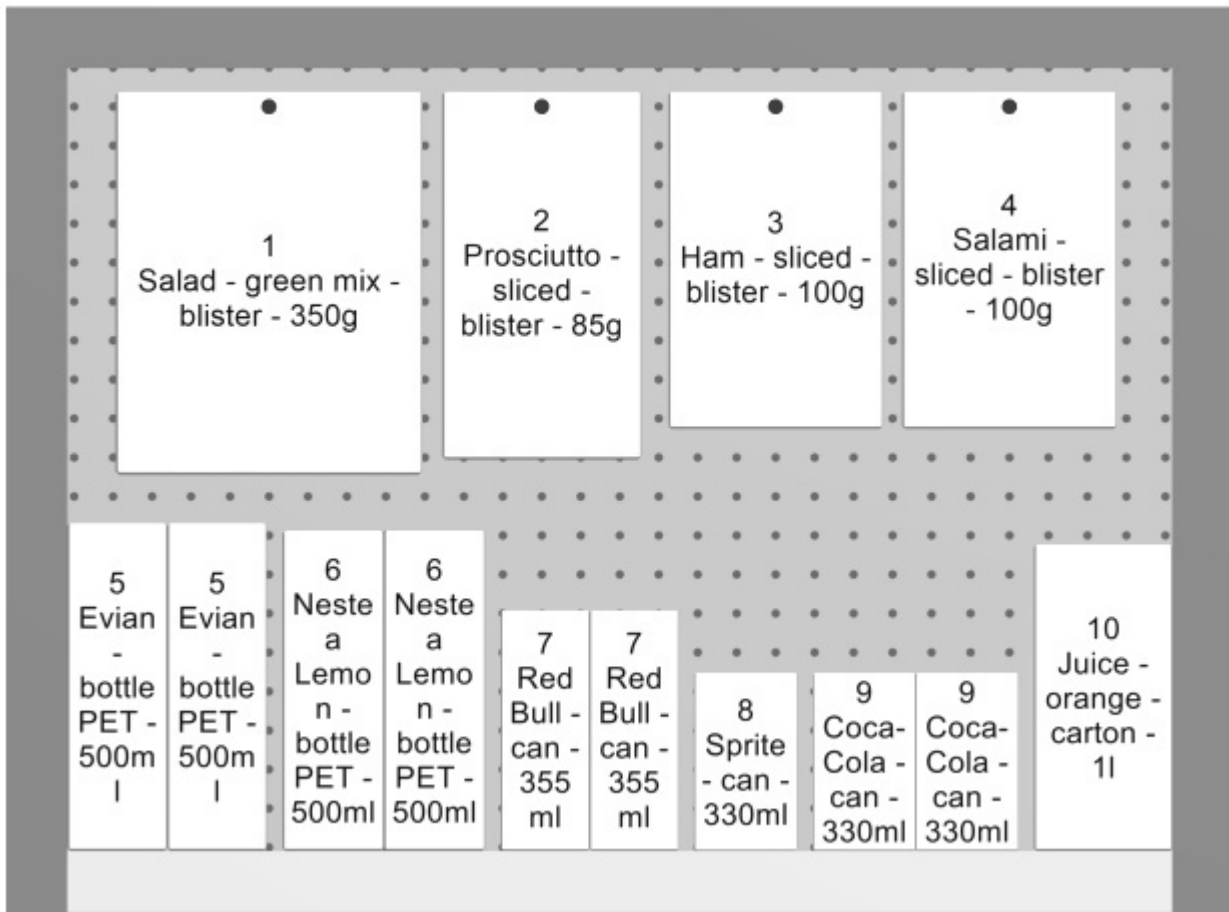
Reset panes

This command resizes and repositions all the user interface panes to their default values.

Schematic view (View)

Toggles a special display mode showing all the products in your project as a simplified, schematic view.

- Keyboard shortcut: **V**
- Supported values:
 - *Pressed (checkmarked)*: Schematic view is enabled.
 - *Not pressed (not checkmarked)*: Schematic view is disabled.
- Default value: *Not pressed (not checkmarked)*



Example of Schematic view

Important note: There are several options to configure Schematic view. Consult [Schematic view \(Settings\)](#) and to [Schematic view / Generic products / Dimensions](#) for instructions and examples of these options.

Font size

With this tool, you can adjust the size of product labels with your mouse.

Instructions:

1. Activate the tool from the menu.
2. Place your mouse cursor in the visualization area.
3. Press and hold the left mouse button.
4. Move your mouse left, right, up or down. The text size changes.
5. Release the mouse button.
6. Activate another tool to exit this feature. E.g., [Zoom](#)

To set the text size back to its default value:

1. Activate the tool from the menu.
2. Place your mouse cursor with the visualization area.
3. Click the left mouse button.
4. Activate another tool to exit this feature. E.g., [Zoom](#)

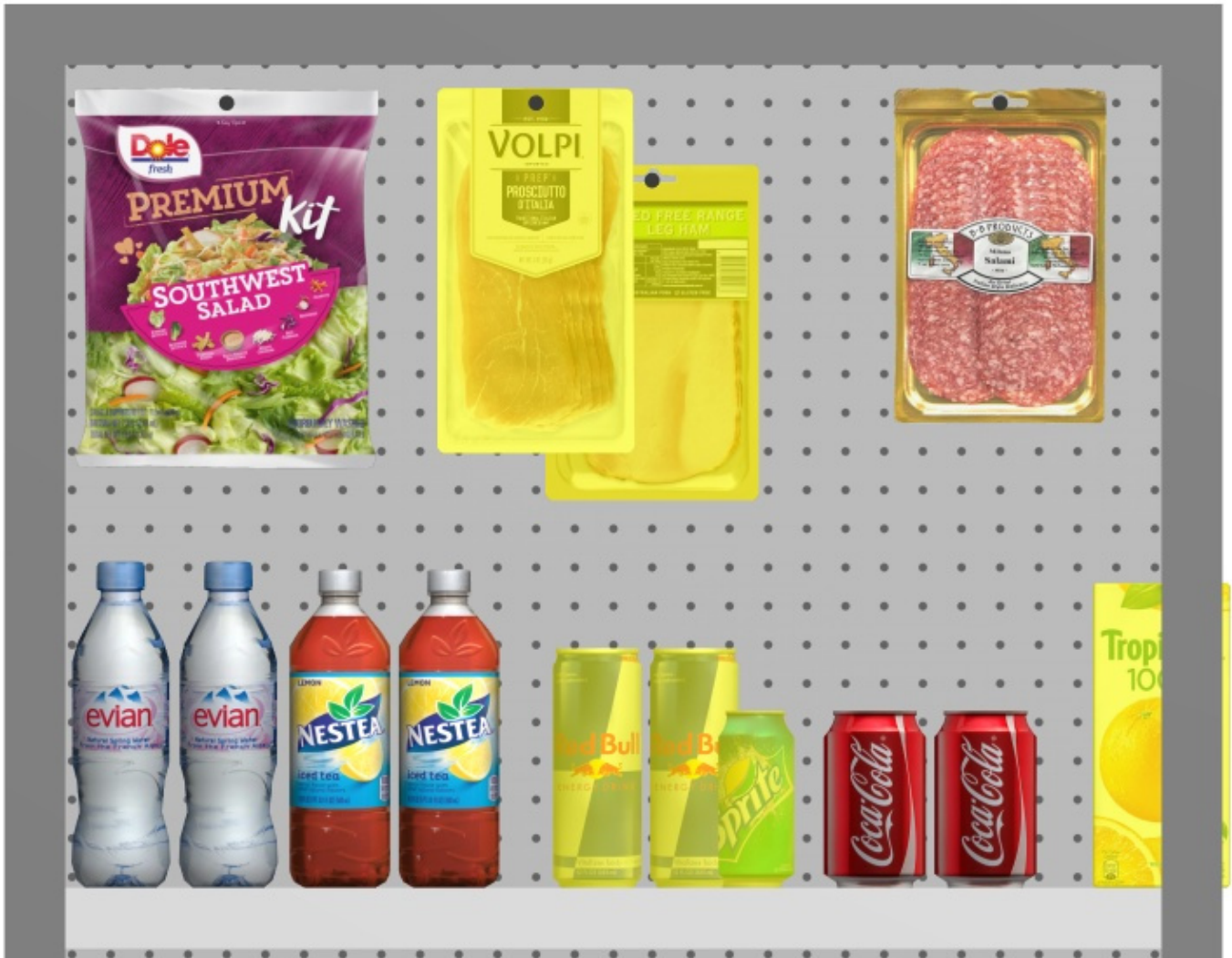
Tip: You can also set the font size value precisely with the setting named [Font height](#). That section also explains in detail which label texts are affected by this tool.

Highlight overlaps

Toggles highlighting the products which physically overlap other items or bay components.

It is especially useful to identify overlaps in your project if you have disabled [Collisions \(Settings\)](#), because in this case items can easily be mistakenly placed partially over other items.

- Supported values:
 - *Pressed (checkmarked)*: items that overlap are highlighted in yellow.
 - *Not pressed (not checkmarked)*: items that overlap are not highlighted.
- Default value: *Not pressed (not checkmarked)*



Example of Highlight overlaps

View the room

Toggles the visibility of [Room](#). Hiding it is useful for example when it blocks the view while working with shelving or products.

- Supported values:
 - *Pressed (checked)*: Room is visible.
 - *Not pressed (not checked)*: Room is hidden.
- Default value: *Pressed (checked)*

View front panels

Toggles the visibility of bay components of type: Front panel. Hiding front panels allows selecting and editing products behind the panels, for example in case you have glass doors on a cooler. You can then display the front panels once all items behind are positioned.

- Supported values:
 - *Pressed (checked)*: front panels are visible.
 - *Not pressed (not checked)*: front panels are hidden.

- Default value: *Pressed (checkmarked)*

Note: Consult [Front panel \(New bay components\)](#) for details on such bay components.

View peg hooks

Toggles displaying the actual hooks of pegged products. Showing the hooks can help visualizing where the peg is located exactly, including any offset.

- Keyboard shortcut: **K**
- Supported values:
 - *Pressed (checkmarked)*: front panels are visible.
 - *Not pressed (not checkmarked)*: front panels are hidden.
- Default value: *Pressed (checkmarked)*



Example of View peg hooks

Note: To define the peg length, refer to:

- [Hook length \(Back panel \(Create bays\)\)](#)
- [Hook length \(Selected back panels\)](#)

View dimensions

Toggles the display of dimension lines and values for the objects in your planogram.

Showing dimensions assists you when placing products, building or resizing shelving and room elements.

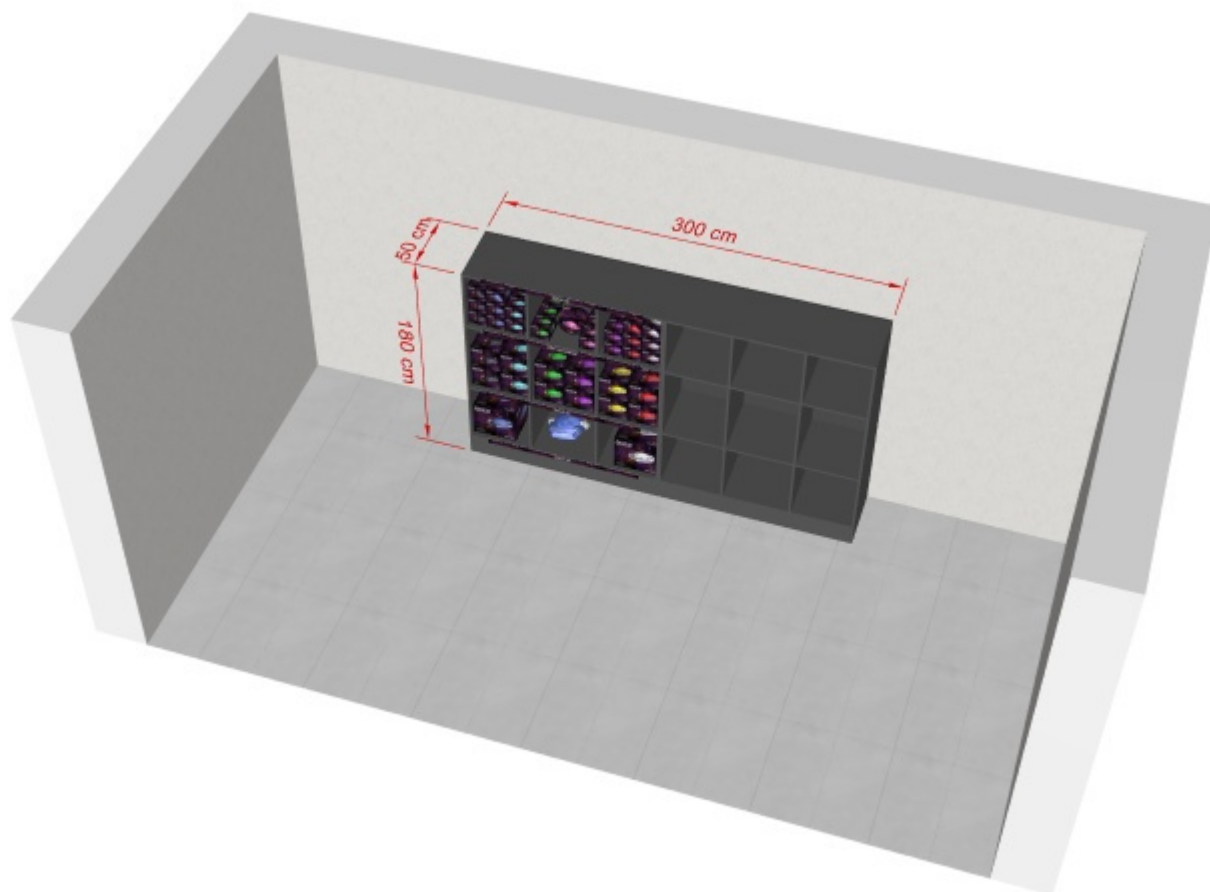
- Keyboard shortcut: **D**
- Supported values:
 - *Pressed (checkmarked)*: dimensions are displayed.

- *Not pressed (not checkmarked)*: dimensions are not displayed.
- Default value: *Not pressed (not checkmarked)*

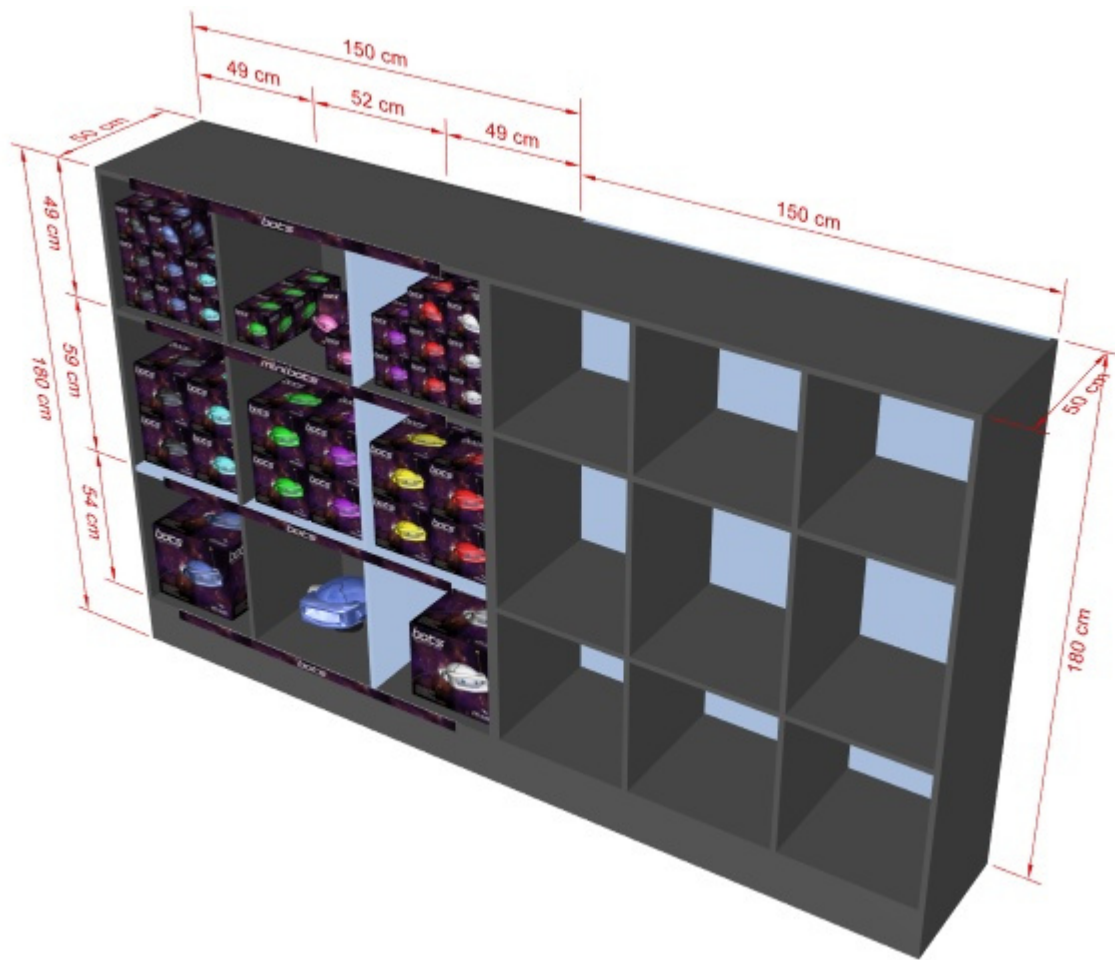
Note: You can configure various options for display of dimensions in Settings. Consult the sections under [Schematic view / Generic products / Dimensions](#).

Depending on the context, various dimensions are displayed on screen:

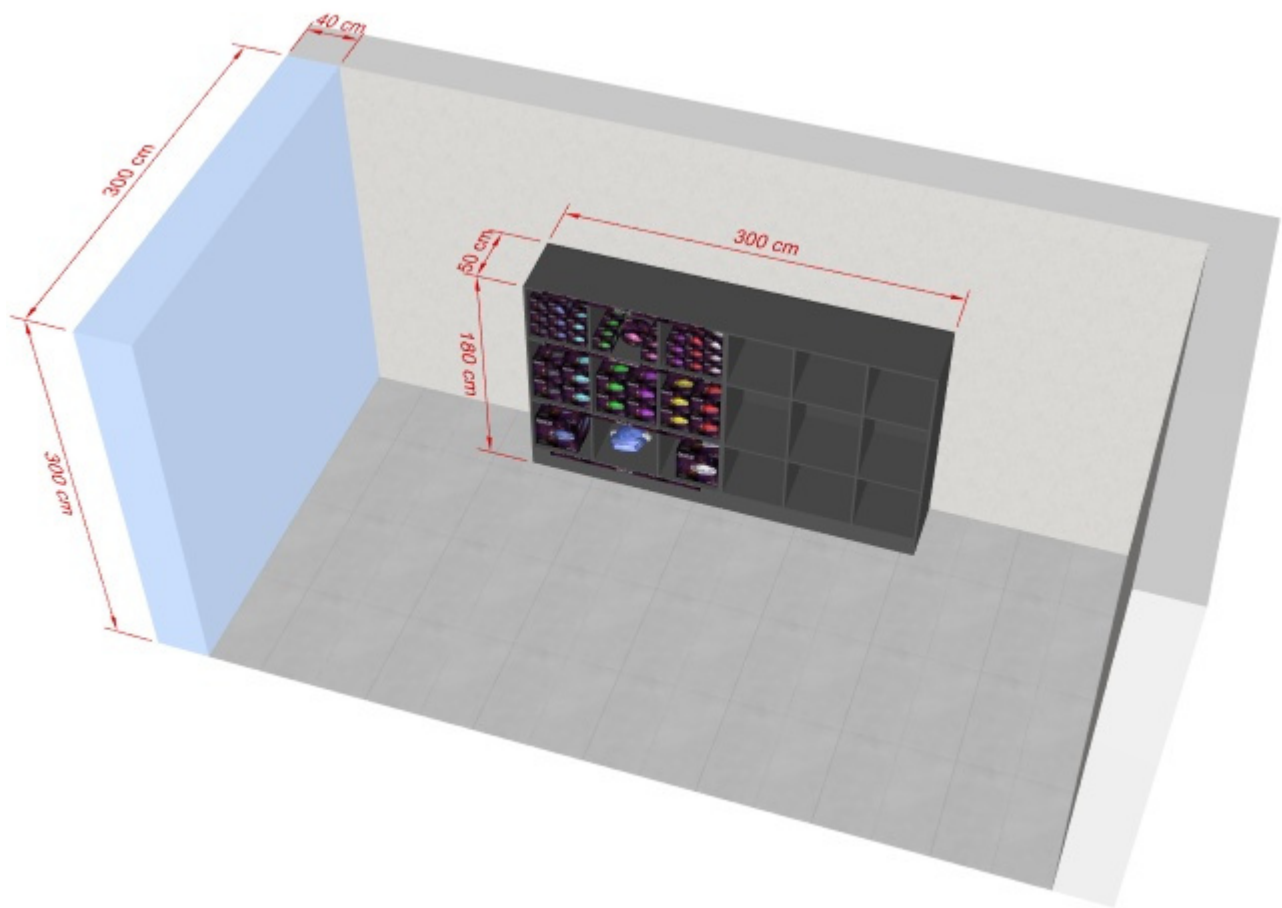
By default, the overall *width*, *depth* and *height* are shown for each isolated bay and each group of adjacent bays:



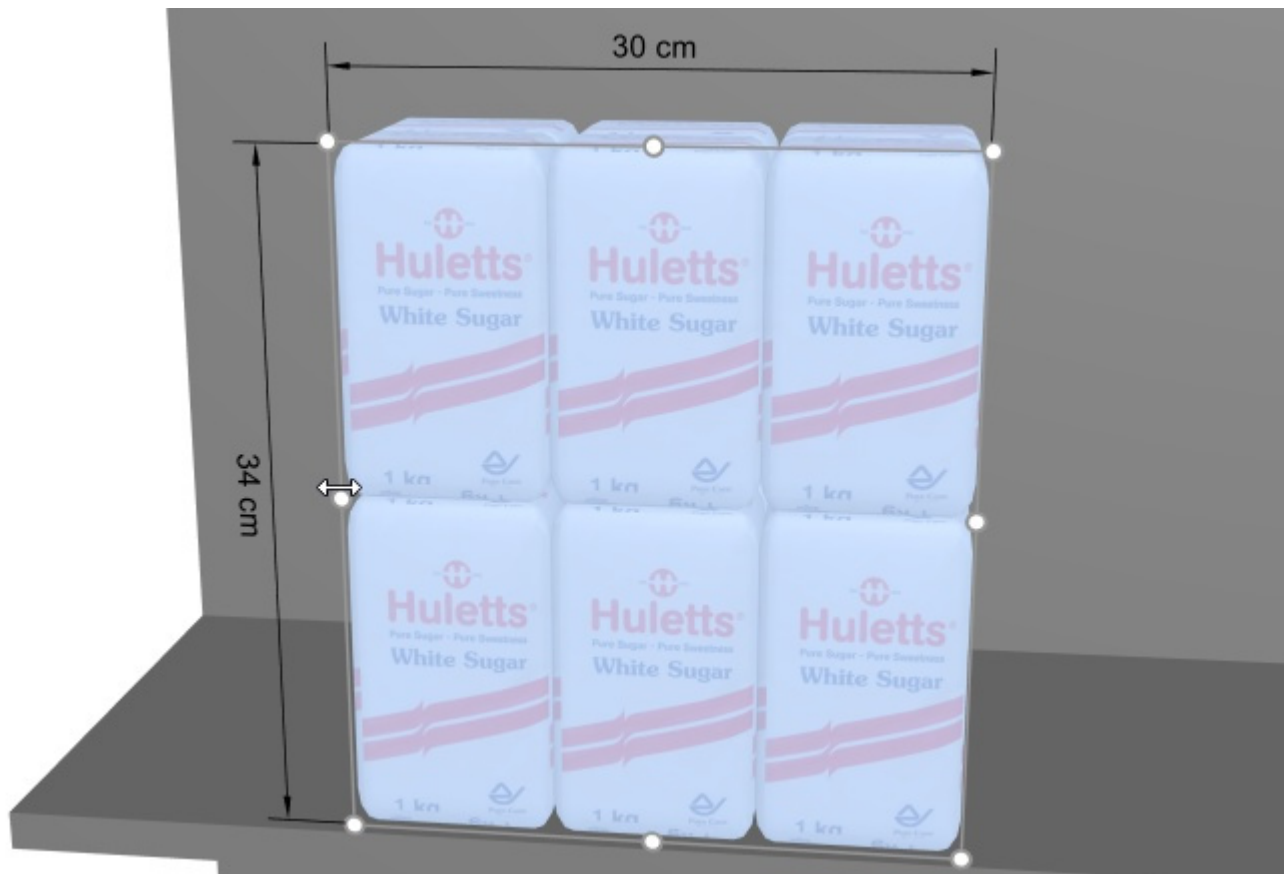
Additionally, for each bay with at least one selected **shelf**, vertical shelf measures are shown. And for each bay with at least one **Dividing panel** selected, lateral distances between each **Dividing panel** are displayed, as shown below:



Additionally, the overall width, depth and height of each selected room element are also displayed, as shown below:



The dimensions of any bay, bay component or block of products are also displayed when clicking on one of its round handles in the corresponding editing mode, as shown below:



Note: a dimension is only displayed if the viewing angle and the available space allows. If you can't see a desired dimension, use [Zoom](#), [Orbit](#), [Pan](#) tools to adjust the view accordingly.

View edges

Toggles the drawing of edge lines on objects. This is useful to help distinguish each product and bay component in your planograms.

- Keyboard shortcut: **E**
- Supported values:
 - *Pressed (checkmarked)*: edge lines are drawn.
 - *Not pressed (not checkmarked)*: edge lines are not drawn.
- Default values:
 - Preview in [Create bays](#): *Pressed (checkmarked)*
 - Visualization area:
 - PlanogramBuilder light version: *Pressed (checkmarked)*
 - PlanogramBuilder full version: *Not pressed (not checkmarked)*

When checkmarked, the edges are drawn for the following cases and objects:

- For all [Room](#) and bay components (including in [Create bays](#))
- For products which use the shape: **box** and have no image applied. Consult [Shapes for 1 image \(no transparency\)](#).
- For Generic products, consult [Insert generic product](#).

- For all products, when [Schematic view](#) is checkmarked and [Product style](#) is set to *Box & label*.



Above example:

- View edges: checkmarked
- Schematic view: checkmarked
- Product style: Box & label



Above example:

- *View edges: checkmarked*
- *Schematic view: not checkmarked*

View flow direction

Toggles the display of arrows indicating Flow direction at the base of each bay in your project. This command has no effect on bays for which Flow direction hasn't been defined. Consult [Flow direction](#) for details on how to set the flow direction for your bays.

- Supported values:
 - *Pressed (checkmarked):* front panels are visible.
 - *Not pressed (not checkmarked):* front panels are hidden.
- Default value: *Not pressed (not checkmarked)*



View grid

Toggles the display of a grid helper on the floor plane. The grid can be used to position bays and room elements by snapping them on the grid lines and intersections.

- Keyboard shortcut: **G**
- Supported values:
 - *Pressed (checkmarked)*: the grid is displayed.
 - *Not pressed (not checkmarked)*: no grid is displayed.
- Default value: *Not pressed (not checkmarked)*



Orthographic view

Toggles a display mode which removes any perspective effect: this is called an orthographic view.

- Keyboard shortcut: **H**
- Supported values:
 - *Pressed (checkmarked)*: the planogram is displayed in orthographic mode.
 - *Not pressed (not checkmarked)*: the planogram is displayed in perspective mode.
- Default value: *Not pressed (not checkmarked)*

Tip: Combine Orthographic view with [Default view](#) to obtain a 2D front view of your planogram.



Example of Orthographic view: checkmarked



Example of Orthographic view: not checkmarked

Stereo vision

Toggles displaying your planogram in stereoscopic anaglyph mode. You will need a pair of red/cyan glasses to perceive the 3D depth of the view.

- Supported values:

- *Checkmarked:* the planogram is displayed in stereographic anaglyph mode.
- *Not checkmarked:* the planogram is displayed without stereo effect.
- Default value: *Not checkmarked*

Note: this command is only available in the menu, not as a toolbar button.



Stereo effect strength

This tool lets you adjust the amount of stereo effect when [Stereo vision](#) is checkmarked. It does so by changing the separation distances between the left and right images. This helps match your physical eye separation.

Instructions:

1. Click on this command: [Stereo vision](#).
2. Put your red/cyan glasses on.
3. Activate this tool: **Main Menu > View > Stereo effect strength**.
4. While holding the left mouse button down in the visualization area, move your **mouse up or down** to increase or decrease the effect.

Note: This command is only available in the menu, not in the toolbar.

Tips:

- We advise using a minimal effect to avoid ghost images and headaches.
- While the tool is active, you can click on the visualization area to reset the default value.

Lighting intensity

This tool lets you adjust the amount of light in your planogram.

Instructions:

1. Activate this tool from: **Main Menu > View.**
2. While holding the left mouse button down in the visualization area, move your **mouse up or down** to increase or decrease the lighting.

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

Lighting direction

This tool lets you adjust the orientation of the light in your planogram.

Instructions:

1. Activate this tool from: **Main Menu > View.**
2. While holding the left mouse button down in the visualization area, move your **mouse in any direction** to change the direction of lighting.

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

Full screen

This command toggles the full screen mode.

- Keyboard shortcut: **F11**: toggles Full screen

In this mode, the planogram visualization is maximized to fill the whole screen.

You can still use commands for Edit, View and Navigation from the toolbars and from the main context menu.

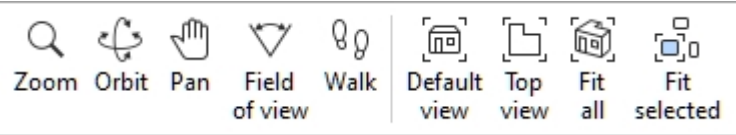
You can also still use [Mouse & keyboard shortcuts](#) to perform any supported actions.

Navigation

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

Tools and commands (Navigation)

The toolbar includes common tools and commands to navigate in the visualization area:



These and additional related commands are available in [Main Menu](#) > **Navigation**:

Zoom	Z
Orbit	O
Pan	P
Field of view	F
Walk	W
<hr/>	
Default view	A
Top view	T
Fit all	Shift+A
Fit selected	Shift+S

Zoom

This tool lets you zoom in and out in the visualization area.



- Keyboard shortcut: **Z**

Instructions:

Method 1: dedicated tool mode

1. Activate the tool with its button, menu entry or keyboard shortcut.
2. While holding the left mouse button down in the visualization area, move the mouse up to zoom in, or down to zoom out.

3. Switch to another tool after you have finished zooming.

Method 2: temporary mode

You can also zoom in and out without activating the tool. This method provides a convenient temporary zoom while keeping any other tool active, such as editing tools:

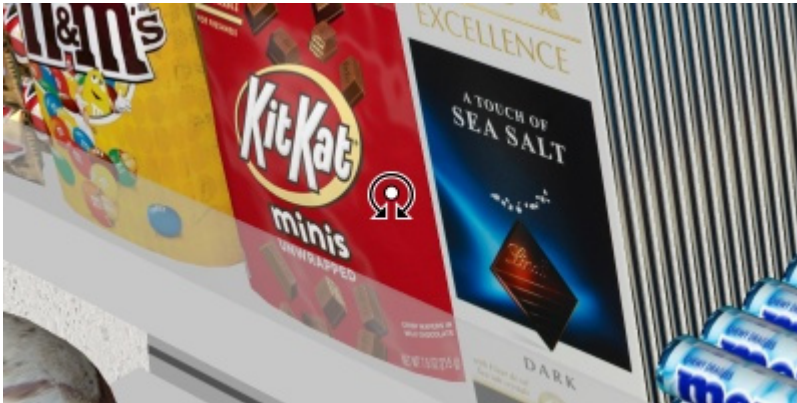
1. **scroll your mouse wheel** in the visualization area.

Note: When you zoom in, the scene is centered on the location of your mouse pointer.

Tip: to zoom slower, hold **Space bar** while zooming.

Orbit

This tool lets you rotate the scene viewpoint.



- Keyboard shortcut: **O**

Instructions:

Method 1: dedicated tool mode

1. Activate the tool with its button, menu entry or keyboard shortcut.
2. While holding the left mouse button down in the visualization area, move your mouse in the direction you wish to rotate.

Method 2: temporary mode

You can also pivot the view without activating the tool. This method provides a convenient temporary orbit while keeping any other tool active, such as editing tools:

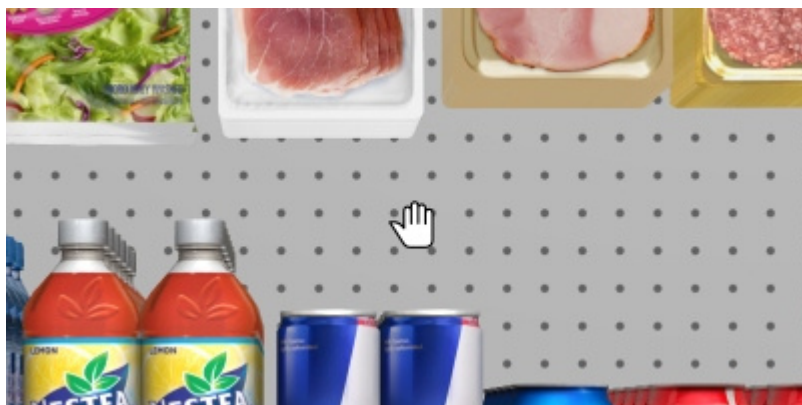
1. While holding **Ctrl + middle mouse button** pressed, **drag the mouse** in the visualization area.

Note: The scene rotates around the position of your mouse pointer.

Tip: To pivot slower, hold **Space bar** while pivoting.

Pan

This tool lets you shift the viewpoint left, right, up or down.



- Keyboard shortcut: **P**

Instructions:

Method 1: dedicated tool mode

1. Activate the tool with its button, menu entry or keyboard shortcut.
2. While holding the left mouse button down in the visualization area, move your mouse in the direction you wish to shift the view.

Method 2: temporary mode

You can also pan the view without activating the tool. This method provides a convenient temporary pan while keeping any other tool active, such as editing tools:

1. While holding the **middle mouse button** pressed, **drag the mouse** in the visualization area.

Tip: to pan slower, hold **Space bar** while panning.

Field of view

This tool lets you increase and decrease the perspective effect (FOV) in the visualization area. It is like changing the focal length of a lens on a real camera.



Keyboard shortcut: **F**

Instructions:

1. Activate the tool with its button, menu entry or keyboard shortcut.
2. While holding the **middle mouse button** pressed, move your mouse up or down until you are happy with the perspective.

Notes:

- While the tool is active, you can click on the visualization area to reset its value to a default value.
- The default value is also automatically reset to when closing PlanogramBuilder.

Walk

This tool lets you move your viewpoint in the visualization area as if you were walking in the store.



- Keyboard shortcut: **W**

Instructions:

Method 1: mouse navigation

1. Activate the tool with its button, menu entry or keyboard shortcut.
2. While holding the **middle mouse button** pressed, move your mouse in the direction you want to walk:
 - Move forward: **mouse direction up**
 - Move backwards: **mouse direction down**
 - Turn left: **mouse direction left**
 - Turn right: **mouse direction right**
3. Once you have reached the desired direction and speed, hold the mouse at the same location to maintain the speed and direction.
4. Move the mouse in the desired direction when you want to adjust direction or speed.
5. To look up or down, press the **left, then the right mouse buttons and hold both down**. You can also use method 2 below.

Method 2: keyboard navigation

1. Activate the tool with its button, menu entry or keyboard shortcut.
2. Use the following keyboard keys to walk:
 - Turn left: **Left arrow**
 - Turn right: **Right arrow**
 - Move forward: **Up arrow**
 - Move backwards: **Down arrow**
 - Look up: **Space bar + Up arrow**

- Look down: **Space bar + Down arrow**

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

Tips:

- To walk slower, hold **the Space bar** while walking.
- You may want to widen the field of view for a more lifelike experience when walking ([Field of view](#)).

Default view

This command resets the visualization area to a predefined view which fits all the visible elements in your planogram.

This default view varies depending on which task is active when you apply the command:

- In the task named [Room](#), your planogram is shown from the front looking downwards to facilitate room creation and edition, as in the example below:



- In other tasks, your planogram is shown straight from the front, as in the example below:



- Keyboard shortcut: **A**

Top view

This command shows all your planogram elements in a plan view.



Top view in perspective



Top view in orthographic

Keyboard shortcut: **T**

Fit all

This command zooms the view to show the whole planogram content, while retaining the current viewing angle and field of view.

- Keyboard shortcut: **Shift + A**



Fit selected

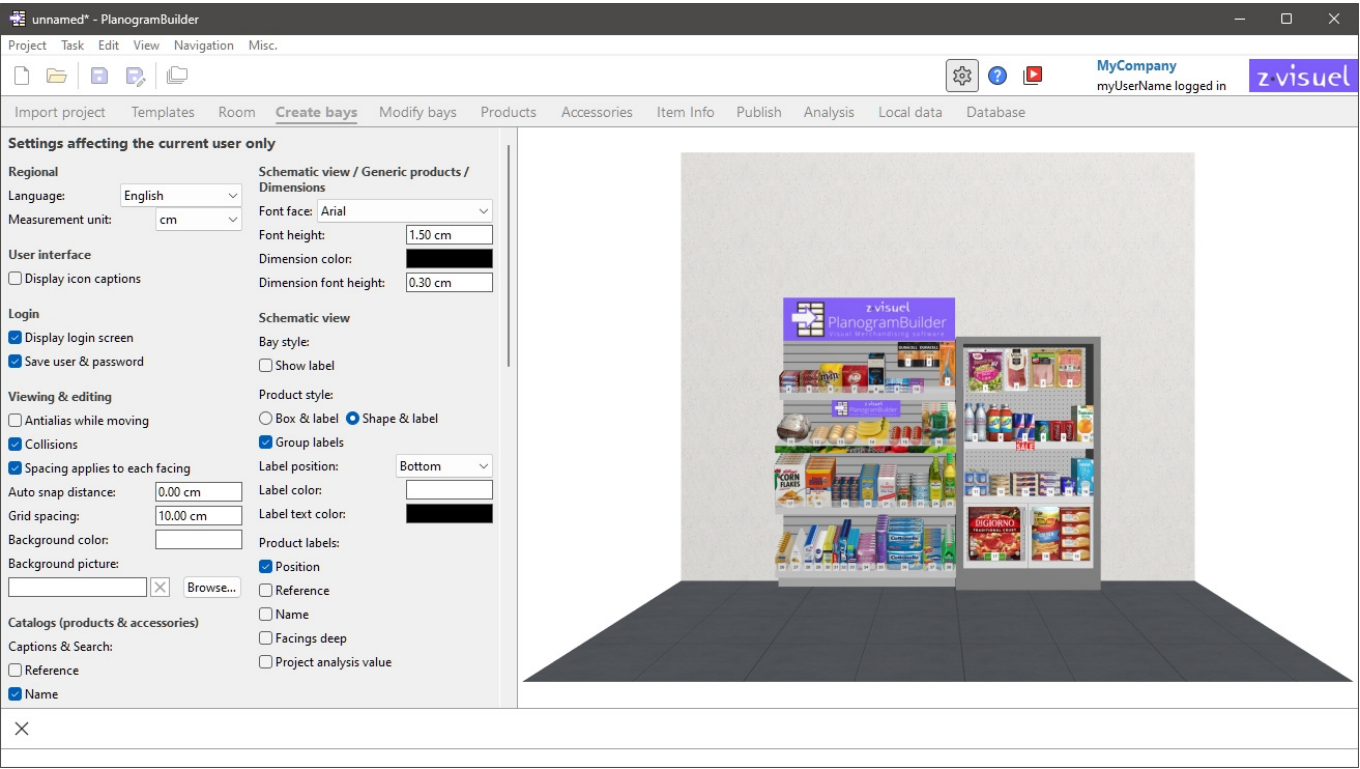
This command zooms the view onto the selected planogram elements, while retaining the current viewing angle and field of view.

- Keyboard shortcut: **Shift + S**



Settings

This pane contains various settings of the application. Some settings are for the current user (per user name), while others apply to all the users in your company (per accountID).
You can close the pane with the **Cancel** button (or with **Esc** key, but only before using your mouse on any user interface element of the pane).



Each setting is described below.

Settings affecting the current user only

The following Settings are saved for each username. So, if you have several users in your company, each can set his/her own preferences.

Settings affecting the current user only

<p>Regional</p> <p>Language: <input type="text" value="English"/></p> <p>Measurement unit: <input type="text" value="cm"/></p> <p>User interface</p> <p><input type="checkbox"/> Display icon captions</p> <p>Login</p> <p><input checked="" type="checkbox"/> Display login screen</p> <p><input checked="" type="checkbox"/> Save user & password</p> <p>Viewing & editing</p> <p><input type="checkbox"/> Antialias while moving</p> <p><input checked="" type="checkbox"/> Collisions</p> <p><input checked="" type="checkbox"/> Spacing applies to each facing</p> <p>Auto snap distance: <input type="text" value="0.00 cm"/></p> <p>Grid spacing: <input type="text" value="10.00 cm"/></p> <p>Background color: <input type="text"/></p> <p>Background picture: <input type="text"/> <input type="button" value="X"/> <input type="button" value="Browse..."/></p> <p>Catalogs (products & accessories)</p> <p>Captions & Search:</p> <p><input type="checkbox"/> Reference</p> <p><input checked="" type="checkbox"/> Name</p>	<p>Schematic view / Generic products / Dimensions</p> <p>Font face: <input type="text" value="Arial"/></p> <p>Font height: <input type="text" value="1.50 cm"/></p> <p>Dimension color: <input type="text" value="Black"/></p> <p>Dimension font height: <input type="text" value="0.30 cm"/></p> <p>Schematic view</p> <p>Bay style:</p> <p><input type="checkbox"/> Show label</p> <p>Product style:</p> <p><input type="radio"/> Box & label <input checked="" type="radio"/> Shape & label</p> <p><input checked="" type="checkbox"/> Group labels</p> <p>Label position: <input type="text" value="Bottom"/></p> <p>Label color: <input type="text"/></p> <p>Label text color: <input type="text" value="Black"/></p> <p>Product labels:</p> <p><input checked="" type="checkbox"/> Position</p> <p><input type="checkbox"/> Reference</p> <p><input type="checkbox"/> Name</p> <p><input type="checkbox"/> Facings deep</p> <p><input type="checkbox"/> Project analysis value</p>
--	--

Default values shown above

Regional

Language

The language of the application.

- Supported values:
 - **German**
 - **English**
 - **Spanish**
 - **French**
 - **Portuguese**
 - **Russian**
- Default value: **English**

Note: If you wish to have the interface translated to another language, contact us at planogrambuilder@zvisuel.com.

Measurement unit

The measurement unit used in PlanogramBuilder, such as for room elements, shelving and product dimensions.

- Supported values:

mm

millimeters

cm

centimeters

inch

decimal inches

m

meters

- Default value: **cm**

Note: changing the measurement unit lets you enter and display the dimensions of products or shelving in your preferred unit. It does not change their actual size.

User interface

Display icon captions

Toggles the display of text captions under the buttons on toolbars.

Note: If you have a low-resolution screen or if you have set a high display scale in Windows, displaying the captions may prevent all the buttons fitting on your screen. In such case, some toolbars become scrollable to give access to the hidden buttons, but we rather advise turning off captions for ideal comfort.

Login

Video tutorial on this topic: [3: Startup settings](#)

Display login screen

Toggles the visibility of the application login screen.

- Supported values:
 - Checked:* this forces PlanogramBuilder to always show the login screen.
 - Not checked:* the login screen is bypassed ([Save user & password](#) must also be checked).
- Default value: *Not checked*

Save user & password

Toggles remembering the username and password for subsequent logins.

- Supported values:

- *Checkmarked*: the application remembers the last entered username and password, so you don't have to type them again.
 - *Not checkmarked*: you must always enter your username and password when opening PlanogramBuilder.
- Default value: *Checkmarked*

Viewing & editing

Antialias while moving

Toggles antialiasing (edge smoothing) while interacting with the planogram visualization.

- Supported values:
 - *Checkmarked*: the on-screen planogram visualization is always antialiased (smoothed) even while navigating the view or moving items in your planogram.
 - *Not checkmarked*: the on-screen planogram visualization is antialiased only when static. The image quality is a little harsher while moving objects or the view. Choose this setting if you experience slow response while moving the view or objects.
- Default value: *Not checkmarked*

Collisions (Settings)

Controls collision detection for all items and elements in PlanogramBuilder. Collision detection mimics the real world by preventing any overlap between objects. Items can also be pushed by other items when moving them.

- Supported values:
 - *Checkmarked*: collision detection is activated, and the items cannot overlap.
 - If the desired item position **overlaps another item**, the item you are positioning pushes the other item(s) to make space if there is, or it can be blocked by the other item if there is no room to push it further.
 - If the desired item position **overlaps a bay component**, the item you are positioning collides and is blocked by the bay component.
 - *Not checkmarked*: collision detection is deactivated. All items can be placed freely and overlap.
- Default value: *Checkmarked*

Tip: As an alternative to de-activating collision detection in the settings, you can disable collisions temporarily by holding down the **C** key on your keyboard while moving or dragging items on shelves. This is useful to prevent pushing items around while moving them on the shelves.

Spacing applies to each facing

Toggles the effect of spacing when using spacing commands on same products within blocks.

- Affected commands:
 - [Space horizontally](#)
 - [Space vertically](#)
 - [Pack left on shelf](#)
 - [Pack center on shelf](#)

- [Pack right on shelf](#)
 - [Fill shelf width](#)
- Supported values:
 - *Checked*: All the products are redistributed in space no matter if they are part of a block of the same products. All gaps between products within product blocks are also adjusted to match the desired distribution. Use this setting if you want to obtain an even spacing between products, including those part of a same product block.
 - *Not checked*: The groups of the same products are treated as single entities. The gaps between individual products within blocks are however maintained as in the original block. Choose this setting if you want to obtain an even spacing between product blocks, while being able to adjust separately the spacing between products inside blocks.
- Default value: *Checked*
- Examples: Both values are illustrated in [Align and space \(products and accessories\)](#).

Auto snap distance

Determines the threshold at which an item is automatically re-positioned to touch its nearest neighbor when you drag, move or copy it on a shelf.

Also determines the threshold at which an item will automatically be re-positioned precisely at a lateral edge of the shelf, when you drag, move or copy it.

- Supported values: positive numeric value [0-9 and decimal point] (according to [Measurement unit](#))
- Default value: empty (= 0)(no auto snapping)
- Example: 1.5

Examples:

- If you set the distance to 4 cm, a product placed further than 4 cm away from another product will stay where you place it.
- If you set the distance to 4 cm, a product placed closer than 4 cm away from another product will jump and snap adjacent to that product.
- If you set the distance to 4 cm, a product placed closer than 4 cm away from the lateral edge of a shelf will jump and snap aligned to the shelf lateral edge.

Note: This setting only affects products and accessories that are placed on shelves ([standard](#), [stackable](#), [tester](#), [ondisplay](#), [presenter](#)). Other items don't snap together (e.g., [pegged](#), [panel](#), [bay header](#)).

Tip: If you want to be able to place products very close to each other without snapping them together, enter a value of 0 in the setting.

Grid spacing

Sets the distance between thin lines on the grid. Change the value as needed.

- Supported values: positive numeric value [0-9 and decimal point]
- Default value: 10 cm, 100 mm , 5 inches (according to [Measurement unit](#))
- Example: 20

Note: To show / hide the grid, consult [View grid](#).

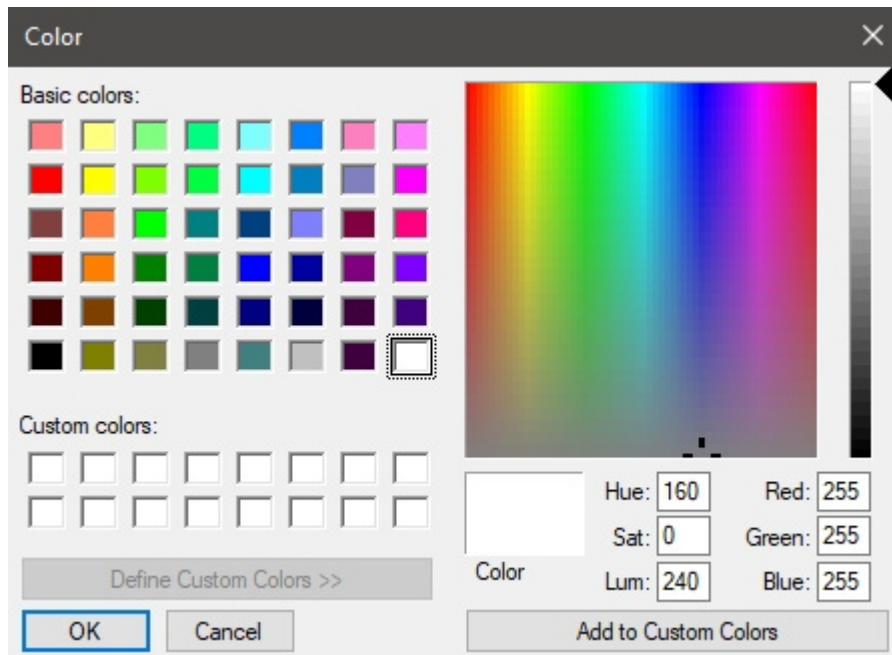
Background color

Sets the background color the visualization area

- Supported values: any color picked from the color palette
- Default value: white
- Example: orange

Instructions:

1. Click on the **color swatch** on the right of **Background color**.
2. Pick any color from the **color palette**.



3. Click **OK** to confirm.

Notes:

- When you change this setting, the latest color is saved in your account and re-used for new projects.
- The current background color is also used in [Single pictures](#).
- The current background color is NOT used in [Reports](#), which have their own background color setting.

Background picture

Defines a background image for your planograms.

- Supported values: file path of image file in supported format (*jpg, png, bmp, gif, tif*)
- Default value: empty (= none)
- Example: *C:\Desktop\my_shop_wall.jpg*

Instructions:

1. Click on **Browse**.
2. Select the desired image file on your PC.
3. Click on **Open**.

4. Wait for the image to upload.

To remove the background image, click on the small **red cross** button.

Notes:

- This setting is saved per user and applies to all projects.
- The background image is also used in [Single pictures](#).
- The background image is NOT used in [Reports](#).

Warning: If you delete the image from your computer, or if you open PlanogramBuilder from a different computer, the background image won't be displayed.

Tip: If you have taken a photograph of the store area where your project will be implemented, you can use a photo as the background and see your project in situation. Example below:



Catalogs (products & accessories)

Captions & Search

Sets the property values displayed as text description below each thumbnail in [Catalog of products](#) and in [Catalog of accessories](#). The selected properties also apply to text search of items in the catalogs based on their corresponding values (consult [Search by text \(Catalog of products\)](#)).

- Supported values:
 - [Reference](#)
 - **Name** (consult [Name \(Item properties\)](#))
 - [Item custom properties \[1 – 12\]](#)
- Default value: **Name**
- Example:
 - **Reference**
 - **Weight**

Note: This setting doesn't apply to [Template catalog](#), which always shows project names.

Schematic view / Generic products / Dimensions

Font face (Settings)

Sets the typeface for various texts displayed in PlanogramBuilder.

- Affected texts:
 - Text labels of **Generic products**. Consult [Insert generic product](#).
 - Text labels of products without [Image \(1 – 6\)](#) which use the shape: **box**.
 - Text labels of all products when [Schematic view](#) is checkmarked.
 - Dimension texts when [View dimensions](#) is checkmarked.
- Supported values: fonts installed on your computer
- Default value: **Arial**
- Example: **Tahoma**

Font height

Sets the text size for various texts displayed in PlanogramBuilder. For example, it may be necessary to use a smaller text size if your product labels cannot be displayed fully with the default text size.

- Affected texts:
 - Text labels of **Generic products**. Consult [Insert generic product](#).
 - Text labels of products without [Image \(1 – 6\)](#) which use the shape: **box**.
 - Text labels of all products when [Schematic view](#) is checkmarked.
- Supported values: positive numeric value [0-9 and decimal point]
- Default value: *2 cm, 20 mm, 0.79 inches* (according to [Measurement unit](#))
- Example: *1.2*

Tip: You can also adjust the font size interactively with a menu tool: [Font size](#).

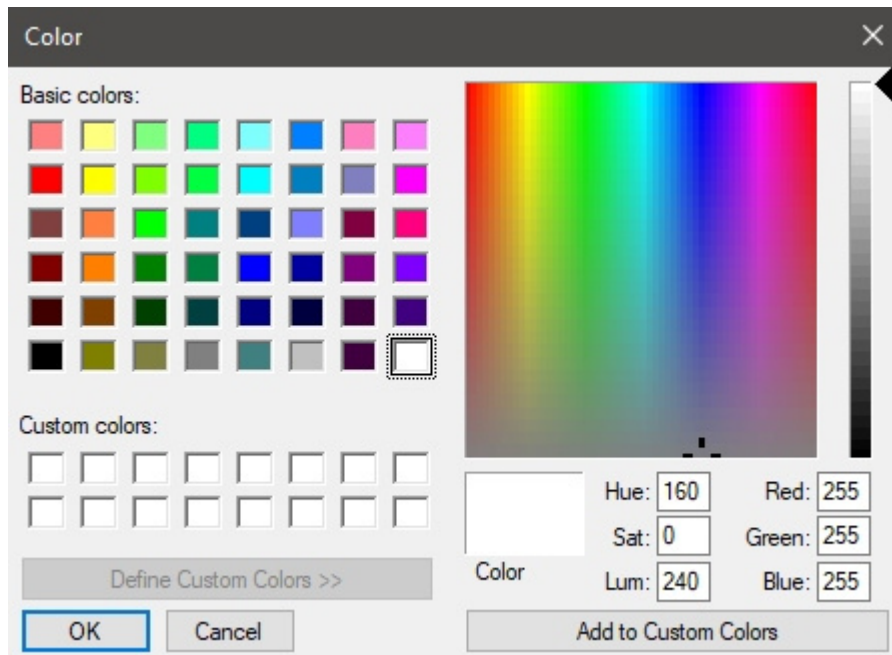
Dimension color

Sets the color of the dimension lines and text when [View dimensions](#) is checkmarked.

- Supported values: any color picked from the color palette
- Default value: white
- Example: orange

Instructions:

1. Click on the **color swatch** on the right of **Dimension color**.
2. Pick any color from the **color palette**.



3. Click **OK** to confirm.

Dimension font height

Sets the font height for dimension value texts when [View dimensions](#) is checkmarked. The size of the dimension line arrows is also adjusted accordingly.

- Supported values: positive numeric value [0-9 and decimal point]
- Default value: 0.3 cm, 3 mm, 0.12 inches (according to [Measurement unit](#))
- Example: 0.4

Tip: The default value corresponds to standard dimension lines and text sizes, so you should only need to change this value when outputting images which will be printed in very large format.

Warning: In the visualization area of [Publish](#), the onscreen dimension text size doesn't actually correspond to the set value, but rather to a scaled preview based on the value of [Resolution \(Single pictures\)](#).

Schematic view (Settings)

Use the settings below to customize the appearance of items when [Schematic view](#) is checkmarked.

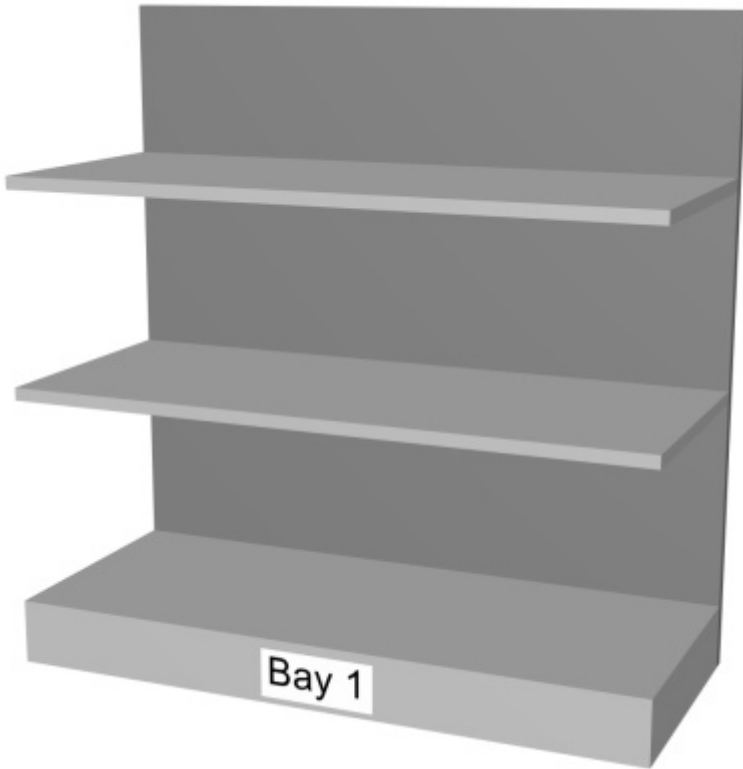
Bay style

Show label

Toggles the display of labels on Bay when [Schematic view](#) is checkmarked.

- Supported values:
 - *Checkmarked*: shows the name of Bay on a label as shown below. Consult [Bay name](#) to find out how to assign the name.
 - *Not checkmarked*: no label is shown on Bay.
- Default value: *Not checkmarked*

Example:



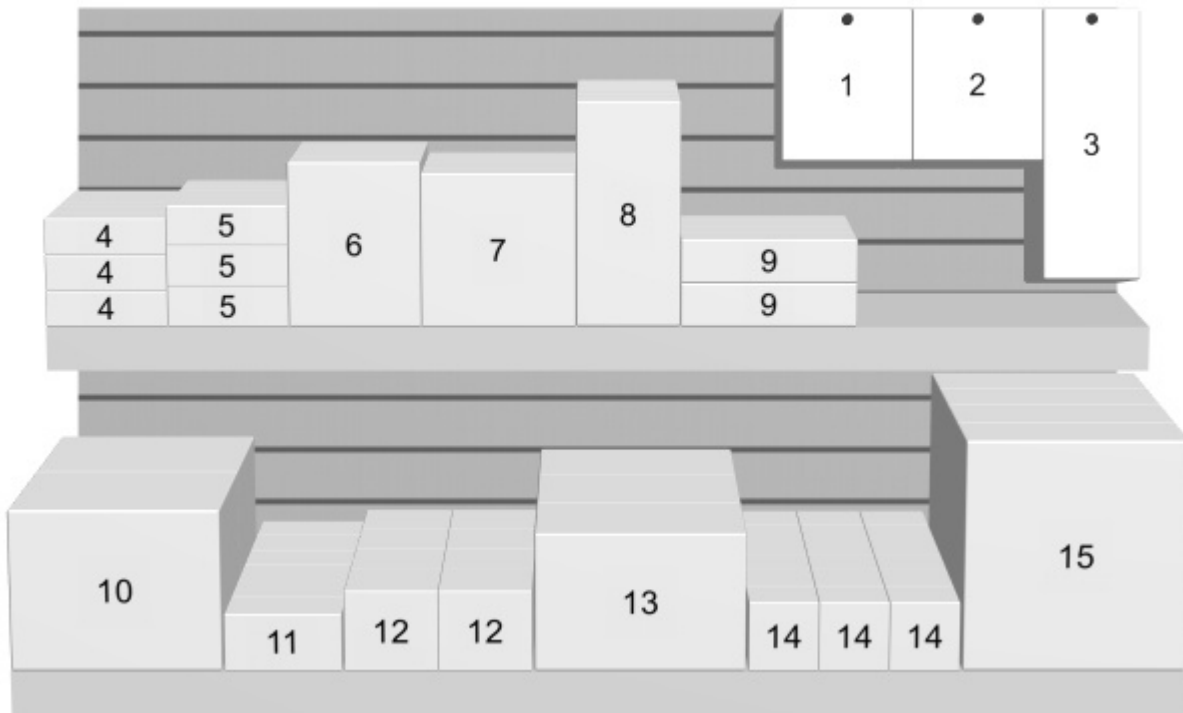
Show label: checkmarked

Product style

The visual style of products when [Schematic view](#) is checkmarked.

- Supported values:
 - **Box & label**: displays products as simple boxes with their caption printed on the front face.
 - **Shape & label**: displays products looking as defined in the database with [Shape, Image \(1 – 6\)](#), with the addition of a caption on a label.
- Default value: **Box & label**

Examples:



Product style: Box & label



Product style: Shape & label

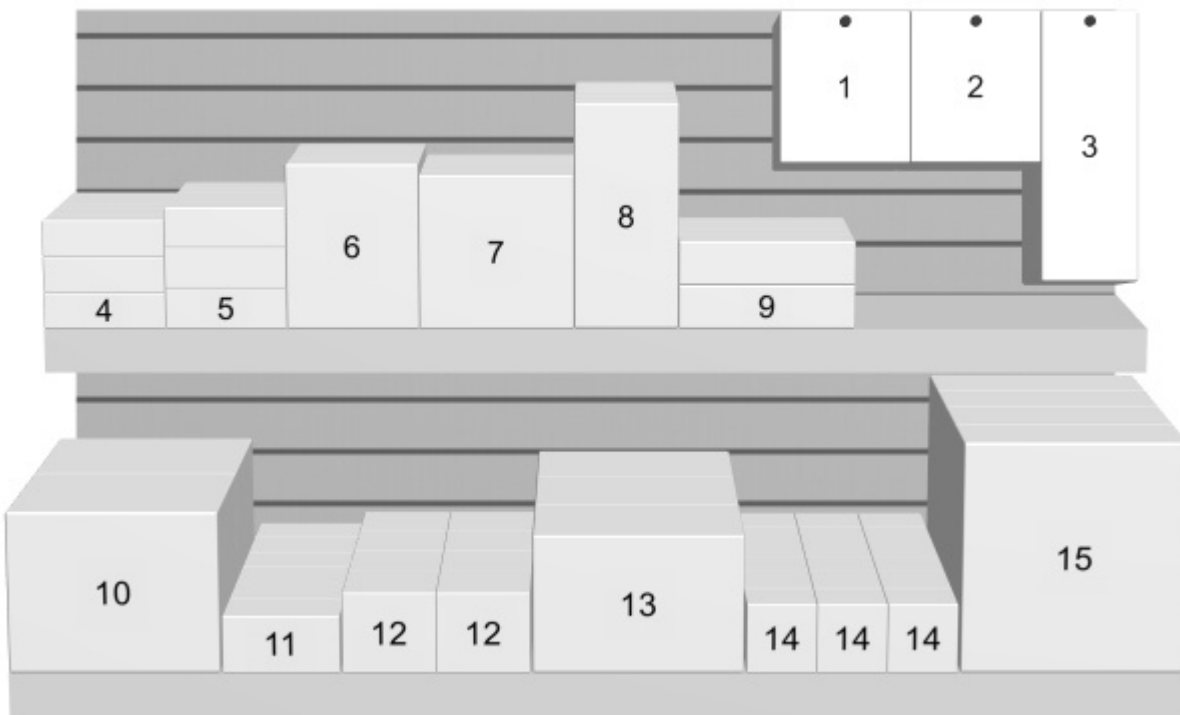
Group labels

Toggles combining labels on products within blocks of same products, when [Schematic view](#) is checkmarked.

- Supported values:

- *Checked:* Labels are combined within each block of the same products. The exact effect depends on the setting of [Product style](#):
 - *Product style: Box & label:* labels are only grouped vertically (e.g., product 5 below). To help visually identify the products, they are not grouped horizontally (e.g., product 14 in below example):
 - *Product style: **Shape & label**:* a single label is displayed for each block of same products.
- *Not checked:* A distinct label is displayed on each item, even within blocks of the same products.
- Default value: *Not checked*

Examples:



Group labels: checked (Product style: Box & label)



Group labels: checkmarked (Product style: Shape & label)

Label position

The vertical position of labels relative to each product, when [Schematic view](#) is checkmarked.

- Supported values:
 - **Above:** the label lower edge is placed at the product upper edge (available only with [Product style: Shape & label](#)).
 - **Top:** the label upper edge is placed at the product upper edge.
 - **Center:** the label is placed at the center of the product.
 - **Bottom:** the label lower edge is placed at the product lower edge.
 - **Below:** the label upper edge is placed at the product lower edge. In this case, the label is also moved forward in front of the shelf to preserve readability (available only with [Product style: Shape & label](#)).
 - **On shelf/peg:** the label positions resemble the way labels are physically placed in stores. The position varies depending on product style and the product behavior.
 - *Product style: Shape & label:*
 - Pegged products: the label lower edge is placed at the product upper edge.
 - Other products: the label upper edge is placed at the product lower edge.
 - *Product style: Box & label:*
 - Pegged products: the label upper edge is placed at the product upper edge.
 - Other products: the label lower edge is placed at the product lower edge.

Tip: Combined with *Product style: Shape & label*, **On shelf/peg** resembles the way labels are physically placed in stores.

Examples:



Label position: On shelf/peg



Label position: Top



Label position: Center



Label position: Below

Label color

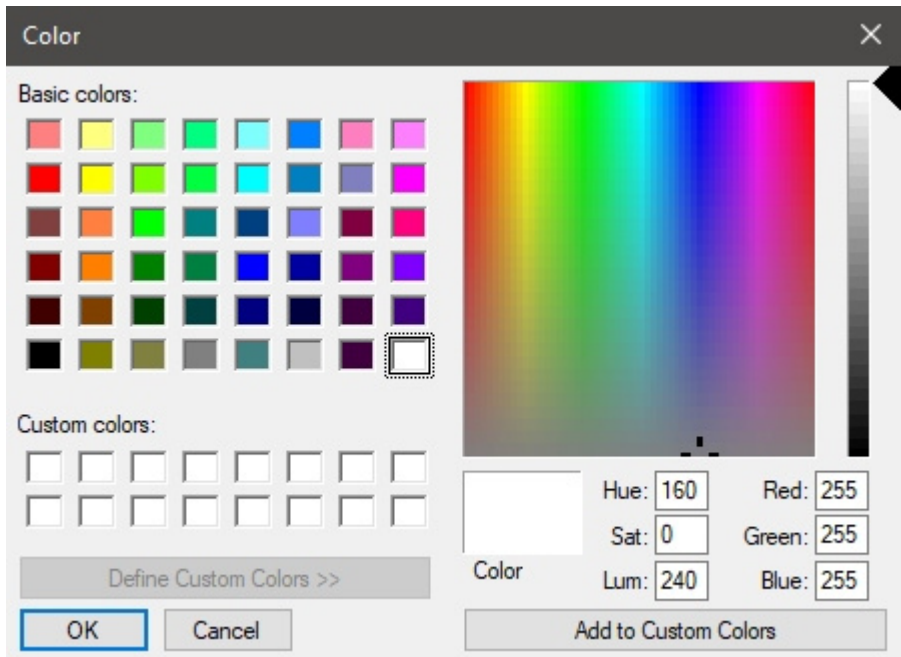
The color of the label background, when [Schematic view](#) is checkmarked.

Only applicable if [Product style](#) is set to Shape & label

- Supported values: any color picked from the color palette
- Default value: white
- Example: orange

Instructions:

1. Click on the **color swatch** on the right of **Label color**.
2. Pick any color from the **color palette**.



3. Click **OK** to confirm.

Label text color

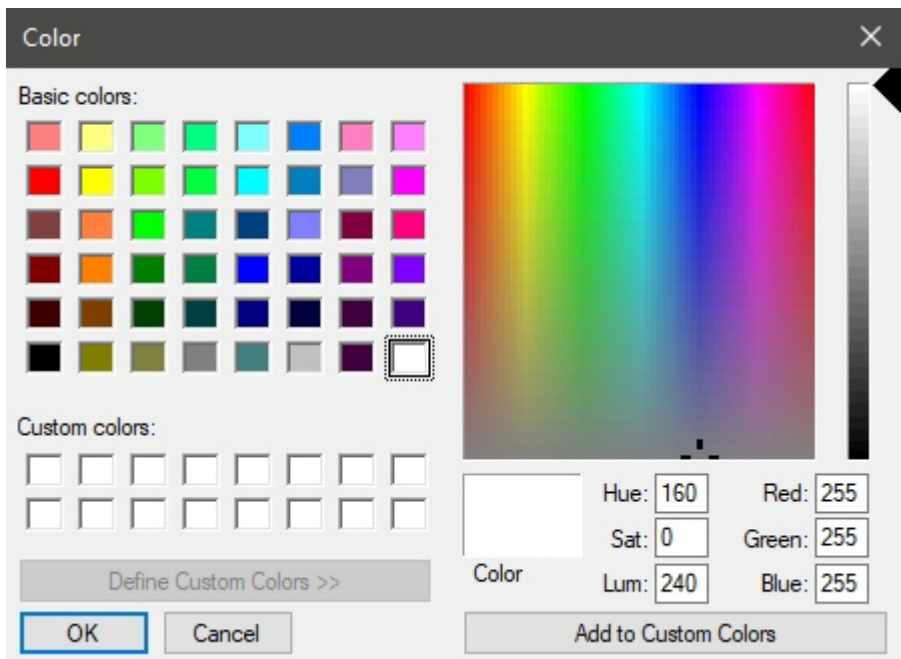
Sets the color of the label text, when [Schematic view](#) is checkmarked.

Only applicable if [Product style](#) is set to Shape & label

- Supported values: any color picked from the color palette
- Default value: black
- Example: blue

Instructions:

1. Click on the **color swatch** on the right of **Label text color**.
2. Pick any color from the **color palette**.



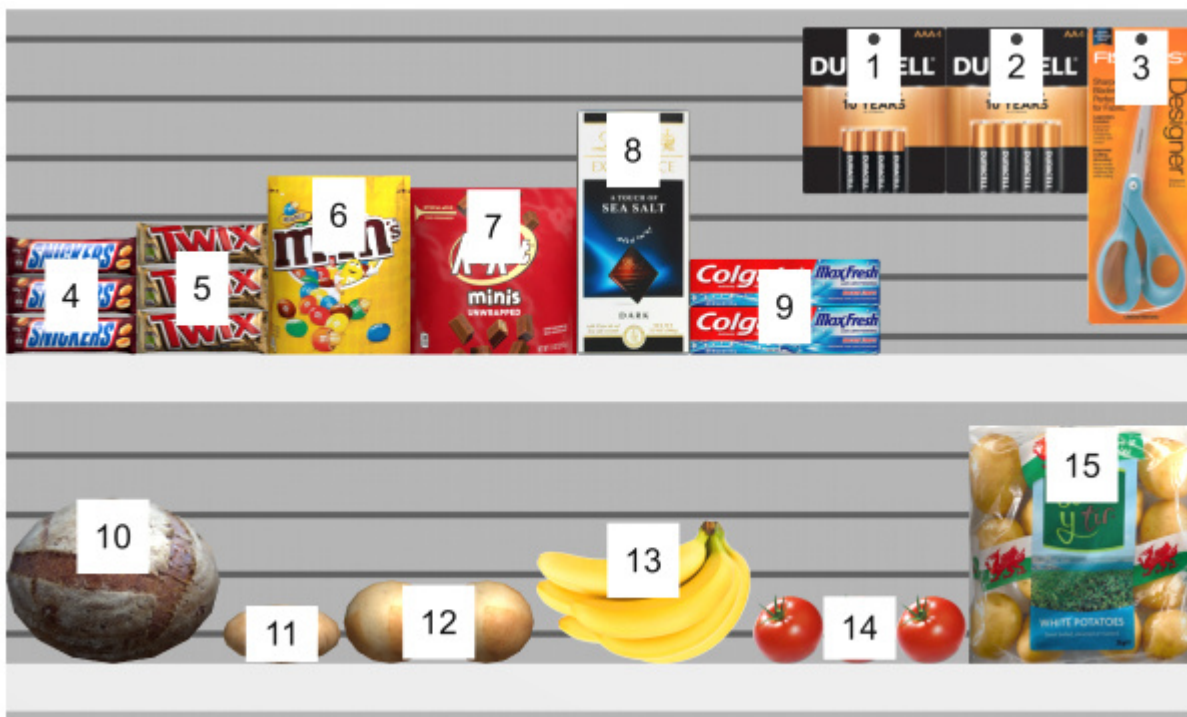
3. Click **OK** to confirm.

Product labels

The information shown on product labels, when [Schematic view](#) is checkmarked.

- Supported values:
 - [Position](#)
 - [Reference](#)
 - [Name \(Item properties\)](#)
 - [Item custom properties \[1 – 12\]](#)
 - [Facings deep](#)
 - Project analysis value: the current result of Project analysis for each product. The displayed values depend on your configuration of [Project analysis](#).
- Default value: **Name**
- Example:
 - [Position](#)
 - [Reference](#)

Examples:



Product labels: Position



Product labels: Project analysis value

Settings affecting all users

The settings below apply to all PlanogramBuilder users sharing your accountID, typically all users in your company.

Note: The settings in this section can only be set by **PlanogramBuilder Administrator**.

Settings affecting all users

Application title:

Application logo:

Item classification properties

A: Classification - level 1:

B: Classification - level 2:

C: Classification - level 3:

Item custom properties

Custom property 1:

Custom property 2:

Custom property 3:

Custom property 4:

Custom property 5:

Custom property 6:

Custom property 7:

Custom property 8:

Custom property 9:

Custom property 10:

Custom property 11:

Custom property 12:

Shared projects:

☒ Standard users can edit bays

☒ Allow clear DB

Interface customization

The following settings allow you to display your own company name and logo in the PlanogramBuilder window.

Application title

Defines the title of the application for all PlanogramBuilder users in your company (sharing your accountID). Normally, the title already shows your company name or your name if you are an individual person. The title appears in light blue at the upper right corner of PlanogramBuilder screen (consult the image of [Screen Layout](#)).

- Supported values: text, including Unicode characters for non-Latin text values
- Default value: the company name (or the first and last name for individual persons) entered when ordering your license (= none)
- Example: *zVisuel SA*

Application logo

Defines an optional logo picture on the title bar visible to all PlanogramBuilder users in your company (consult image of [Screen Layout](#)).

- Supported values: filename and extension in supported format (*jpg, png, bmp, gif, tif*)
- Default value: empty (= none)
- Example: *zVisuel logo.png*

Instructions:

1. Click on **Browse**.
2. Select the desired image file on your PC.
3. Click on **Open**.
4. Wait for the image to upload.

To remove the logo image, click on the small **red cross** button.

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

Database configuration

The following settings let you customize some database properties to match the way you describe and classify your products. These fields should be defined before adding products in the database.

Item classification properties

PlanogramBuilder provides three customizable properties (A, B, C) to hierarchically classify your products, accessories and projects to best match your internal product classification:

- **A: Classification - level 1:** the first level of classification.
- **B: Classification - level 2:** the second level of classification.
- **C: Classification - level 3:** the third level of classification.

Although not compulsory, it is convenient to define the names of each property to match a logical hierarchical order. This will make it easier to drill down in the Product catalog when searching for products. For example, define the first level as Category, the second level as Product line, not the opposite.

To change these property names to match your own classification levels, select a predefined name from the drop-down list for each level. Select **Custom** if the predefined names don't fit your needs. A new text field will appear where you can type the desired name, such as shown below with *Year* and *Country*.

- Supported values:

Brand

Brandline

Category

Group

Main group

Manufacturer

Product line

Region

Sub-brand

Subcategory

Subgroup

Custom

- Default values:
 - A: Classification - level 1: *Category*
 - B: Classification - level 2: *Brand*
 - C: Classification - level 3: *Product line*

Examples of possible combinations:

	Default names	Example 1	Example 2	Example 3
A: Classification - level 1	Category	Category	Category	Country
B: Classification - level 2	Brand	Subcategory	Group	Category
C: Classification - level 3	Product line	Region	Year	Subcategory

Important note: If you enter a custom name for a classification property, make sure not to use the same name as a predefined item property. For example, do not assign the name [Reference](#) or [Enabled](#).

Once you have defined the names for the three properties, you can assign values to each product and accessory in the database under [Item properties](#), and to each project in [Project properties](#).

These properties and values are then also shown in the following PlanogramBuilder areas:

- [Database item list](#) (for products and accessories)
- [Catalog of products](#) (for products)
- [Catalog of accessories](#) (for accessories)
- [Project item list](#) (for products and accessories)
- [Reports](#) (for products and accessories)
- [Template catalog](#) (for projects)

Item custom properties (Settings)

PlanogramBuilder provides up to 12 user-defined optional properties to add attributes to your products and accessories (not applicable to projects and to materials).

To enable a custom property, you must name it. The property thereby becomes available in your database.

- Supported values: text, including Unicode characters for non-Latin text values
- Default value: blank (= none)
- Example: *Weight*

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

1. *Custom property 1*: type *Weight* then press enter to validate.
2. The property is now defined, and weight values can be assigned to your items.

Important note: If you enter a custom name for a classification property, make sure not to use the same name as a predefined item property. For example, do not assign the name [Reference](#) or [Enabled](#).

Once you have defined the name of a property, you can assign values to each product and accessory in the database under [Item properties](#).

These properties and values are then also shown in the following PlanogramBuilder areas:

- [Project item list](#) (for products and accessories)
- [Reports](#) (for products and accessories)

User rights settings

In this section, you will find settings to control how users can edit and share planograms.

Shared projects

If there are several PlanogramBuilder users in your company, you can choose how they will be able to share their planogram projects.

- Supported values:
 - *Disabled*: Each user ([Standard User](#) and [PlanogramBuilder Administrator](#)) can edit only his/her own projects:
 - [Open](#)
 - [Save](#)
 - [Manage](#)
 - *Administrators only*: PlanogramBuilder Administrator can also edit projects of other users:
 - [Open](#)
 - [Save](#)
 - [Manage](#)
 - See the name of each project owner under a column labeled *Owner* in [List of projects](#).
 - *All users*: Each user ([Standard User](#) and [PlanogramBuilder Administrator](#)) can also edit projects of other users:
 - [Open](#)
 - [Save](#)
 - [Manage](#) (only accessible to PlanogramBuilder Administrator)
 - See the name of each project owner under a column labeled *Owner* in [List of projects](#)
- Default value: *Administrators only*

Notes:

- No matter the above setting, a project marked as [Template](#) can always be accessed by other users.

- No matter the above setting, a project marked as *Template* can only be saved by the respective owner. (To make changes to templates if you are not the owner, first uncheck [Template](#).)
- No matter the above setting, projects marked as *Locked (Project properties)* cannot be saved. (To make changes to such planograms, first uncheck [Locked \(Project properties\)](#).)
- No matter the above setting, a project that is already opened by a user cannot be opened by another user. The project must first be closed to allow opening it by another user.

Standard users can edit bays

Enable or disable all shelving creation and editing features for Standard Users.

- Supported values:
 - *Checkmarked:* [Create bays](#), [Modify bays](#) and related tools can be accessed by all users, including [Standard User](#).
 - *Not checkmarked:* [Create bays](#), [Modify bays](#) and related tools are hidden to standard users. Only [PlanogramBuilder Administrator](#) can create and edit shelving.
- Default value: *Checkmarked*

Tip: Disabling shelf editing is typically useful when one or more PlanogramBuilder Administrator(s) is (are) in charge of creating the bays and making them available to other users as [Template](#) or by enabling [Shared projects](#).

Allow clear DB

Toggles the display of [Clear DB](#) button on **Database** toolbar.

In order to minimize the unintentional full deletion of the database content, this toggle must be checkmarked by an administrator before being able to see and use the command which actually clears the database.

- Supported values:
 - *Checkmarked:* displays **Clear DB** button on **Database** toolbar.
 - *Not checkmarked:* hides **Clear DB** button from **Database** toolbar.
- Default value: *Not checkmarked*

Notes:

- Unlike most other settings, check marking this checkbox does not persist after closing PlanogramBuilder. It must be re-enabled at each new session.
- Consult [Clear DB](#) for instructions on deleting the database content.

About PlanogramBuilder

This section shows information about your installed version and hardware.

You may be asked by our support team to copy and send us this information in case of assistance.

About PlanogramBuilder

Application version:	48.7 (AVX2)
Server-side application version:	48.4
OS version:	10.0 Build 22621
Display settings:	3840 x 2160 100%
Logical processors:	8
Account ID:	myCompany_ivj950f2
License valid until:	July 28, 2022

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Mouse & keyboard shortcuts

You can use the following mouse and keyboard shortcuts to make your planogramming experience more productive.

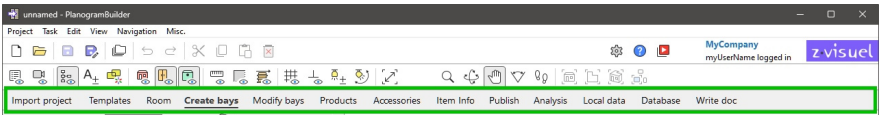
Note: Keyboard shortcuts are not case sensitive in PlanogramBuilder. You can use them either in lower or upper case.

A	Applies Default view
B	Activates Edit bays .
C (held pressed)	Temporarily disables Collisions (Settings) (only while holding the key pressed). Useful when moving items to prevent pushing other items.
D	Toggles View dimensions .
E	Toggles View edges .
F	Activates Field of view .
G	Toggles View grid .
H	Toggles Orthographic view .
I	Activates Edit products and accessories (to work with Products and Accessories).
K	Toggles View peg hooks .
L	Toggles Project item list .
N	Activates Insert generic product .
O	Activates Orbit .
P	Activates Pan .
R	Activates Edit room elements .
S	Activates Edit bay components .
T	Applies Top view .
U	Applies Turn upside down .
V	Toggles Schematic view .
W	Activates Walk .
Z	Activates Zoom .
Delete	Deletes the selected item(s): <ul style="list-style-type: none">• Delete (Edit): Selected room elements, Selected bays,

	<p>Selected bay components, Selected products, Selected accessories.</p> <ul style="list-style-type: none"> • Delete (project) • Delete (database item) • Text boxes: Deletes the selected text
Enter	<p>General: Confirms changes in edit boxes. For example, after typing a shelf dimension, press <i>Enter</i> to apply the new value.</p> <p>Database item list:</p> <ul style="list-style-type: none"> • Shows Item properties for the selected item if not shown yet. • Apply (database item) the selected item if currently editing the item. • Create (database item) a new item if the cursor focus is on any element on the line of Item commands. <p>List of projects: Opens the selected project.</p>
Esc	<p>General: Exits Full screen.</p> <p>Text boxes: Cancels a typed value if the cursor is still in the edit box and the value hasn't been applied yet.</p> <p>Open, Manage, Save as, Settings: Closes the pane, but only before using your mouse on any user interface element of the pane.</p>
Left arrow	<p>For selected product(s): Tip over to left (left).</p> <p>Walk: turns left.</p>
Right arrow	<p>For selected product(s): Tip over to right (right).</p> <p>Walk: turns right.</p>
Up arrow	<p>For selected product(s): Tip over backward (to the back).</p> <p>Walk: moves forward.</p> <p>Lists and catalogs: Moves the focus one row up.</p>
Down arrow	<p>For selected product(s): Tip over forward (forward).</p> <p>Walk: moves backward.</p> <p>Lists and catalogs: Moves the focus one row down.</p>
Space (held pressed)	<p>Pressing the space bar temporarily slows down the mouse; this lets you achieve a better precision with many tools, such as when moving items with Edit products and accessories, or when using Zoom, etc.</p>
Tab	<p>Various panes: moves focus to the next GUI element.</p> <p>Catalog lists: moves focus down in the classification levels.</p>
F1	<p>Help (Opens this user guide)</p>

F11	Toggles Full screen .
Alt + F4	Exits PlanogramBuilder. Consult Exit .
Ctrl + A	Select all products
Ctrl + B	Align left (Selected bay components) Align bottom (products and accessories)
Ctrl + C	Copies values from edit boxes.
Ctrl + E	Center horizontally (Selected bay components) Center horizontally (products and accessories)
Ctrl + L	Align left (Selected bay components) Align left (products and accessories)
Ctrl + M	Center vertically (Selected bay components) Center vertically (products and accessories)
Ctrl + N	New (Projects)
Ctrl + O	Open (Projects)
Ctrl + R	Align right (Selected bay components) Align right (products and accessories)
Ctrl + S	Save (Projects)
Ctrl + T	Align top (Selected bay components) Align top (products and accessories)
Ctrl + V	Pastes values in edit boxes.
Ctrl + Z	Undo (Edit) : reverses one or several operations. Also cancels changes in edit boxes.
Ctrl + Y	Redo (Edit) : re-applies operations that were canceled by Undo (Edit) .
Space + Up / Down arrows	Walk : looks up / down
Shift + A	Fit all
Shift + S	Fit selected
Shift + Tab	Various panes: move focus to the previous GUI element. Catalog lists: move focus up in the classification levels.
Minus (-) on numpad	For the selected product(s) in a planogram, decrements the number of Facings deep .

	<i>Note:</i> There is always at least one product left.
Plus (+) on numpad	For the selected product(s) in a planogram, increments the number of Facings deep . <i>Note:</i> Once the product has been placed as many times as possible in the available depth, the value is reset to <i>auto</i> .
Space + Minus (-) on numpad	For the selected product(s) in a planogram, decrements the number of Facings wide . <i>Note:</i> There is always at least one product left.
Space + Plus (+) on numpad	For the selected product(s) in a planogram, increments the number of Facings wide .
Shift + Minus (-) on numpad	For the selected product(s) in a planogram, decrements the number of Facings high . <i>Note:</i> There is at least one product left.
Shift + Plus (+) on numpad	For the selected product(s) in a planogram, increments the number of Facings high .
Ctrl + Left mouse button drag	Duplicates objects with the following editing tools: <ul style="list-style-type: none"> • Edit room elements • Edit bays • Edit bay components • Edit products and accessories Press Ctrl before clicking on the object and it will be duplicated when you start moving it.
Shift + Left mouse button drag a product from Catalog of products	Changes Behavior for the dragged product: <ul style="list-style-type: none"> • If defined as standard in the database: switches to pegged. • If defined as pegged in the database: switches to standard. This is convenient to quickly place a product from the catalog on peg / shelf when it was not defined as such.
Shift + Left mouse button move product(s) with Edit products and accessories.	Changes Behavior for moved product(s): <ul style="list-style-type: none"> • If defined as standard in the database: switches to pegged. • If defined as pegged in the database: switches to standard. This is convenient to quickly move selected product(s) from peg to shelf or inversely.
Left mouse button click on empty zone of visualization area	Deselects the selected item(s) with the following edit tools: <ul style="list-style-type: none"> • Edit room elements • Edit bays

	<ul style="list-style-type: none"> • Edit bay components • Edit products and accessories
Left mouse button double-click	Fully selects the content of an edit box. For example, to change the text for Application title , double-click in the edit box, then immediately type the new value.
Right mouse button click	Opens a context menu. Such menus are available when the mouse cursor is over various screen elements.
Mouse scroll wheel	<p>Zoom: When the mouse cursor is within the visualization area, scroll your mouse wheel to zoom in and out.</p> <p>Cycle between tasks: When the mouse cursor is within the task selection area, scroll the mouse wheel to cycle between tasks:</p>  <p><i>Cursor zone where you can switch task with the mouse wheel.</i></p>
Hold down Middle mouse button + drag	Pan : When the mouse cursor is within the visualization area, use this combination to temporarily pan the view.
Ctrl + Hold down Middle mouse button + drag	Orbit: When the mouse cursor is within the visualization area, use this combination to temporarily orbit the view.
Ctrl + Mouse scroll wheel	When the mouse cursor is within a log text area, use this combination to zoom in and out.

Troubleshooting

This section contains explanations and workarounds for bugs and known issues.

Known Issues

Connection error

Problem: When you launch PlanogramBuilder, you see an error message starting with: "Connection error: UNAVAILABLE"

Explanation: This message means something is blocking the connection between your computer and our servers, typically a proxy, firewall or some other system software.

Solution: provide your IT with the following instructions:

PlanogramBuilder uses a gRPC service located at <https://planoservice.zvisuel.com>.

HTTP/2 must be enabled and with a proxy server it may be required to remove the above URL from https inspection.

If applying the above steps does not solve the problem, please contact us with a screenshot of the complete error message at planogrambuilder@zvisuel.com.

Slow loading

Problem: It takes forever to open projects, to upload pictures or to export the database.

Explanation: You may have a slow Internet connection to our servers.

Solution: You can test your connection speed to our server at <https://planogrambuilder.zvisuel.com/downloads/speedtest/>

If the reported speed is lower than 5 Mbits/s, it is normal that PlanogramBuilder takes a long time to upload and download items.

Tip: Try to avoid working with a slow connection if possible: for example, switch from Wi-Fi to Ethernet connection whenever it is available.

Product pictures not displayed

Problem: I've tried to upload an image of a product, but the preview shows a white object (or it still shows the old picture).

Solution:

In [Database](#), click on the line of the product in the list to refresh the 3D preview.