Demand Management

Release 6.4

Target Audience

- DM users tasked with data import

Document Version 1.00 - October, 2006
# History of Changes

The following table provides an overview of the most important changes made in the latest versions.

<table>
<thead>
<tr>
<th>Data Management Guide for SAP DM Version</th>
<th>Changes Made by</th>
<th>Important Changes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>D. Simmons</td>
<td>Initial customer release</td>
</tr>
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</table>
## Typographic Conventions

<table>
<thead>
<tr>
<th>Type Style</th>
<th>Represents</th>
<th></th>
<th>Icons</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Example Text</td>
<td>Words or characters quoted from the screen.</td>
<td></td>
<td><img src="image" alt="Caution Icon" /></td>
<td>Caution</td>
</tr>
<tr>
<td></td>
<td>These include field names, screen titles, pushbutton labels, menu names, menu paths, and menu options.</td>
<td></td>
<td><img src="image" alt="Example Icon" /></td>
<td>Example</td>
</tr>
<tr>
<td></td>
<td>Cross-references to other documentation</td>
<td></td>
<td><img src="image" alt="Note Icon" /></td>
<td>Note</td>
</tr>
<tr>
<td>Example text</td>
<td>Emphasized words or expressions in body text, graphic titles, and table titles.</td>
<td></td>
<td><img src="image" alt="Recommendation Icon" /></td>
<td>Recommendation</td>
</tr>
<tr>
<td>EXAMPLE TEXT</td>
<td>Technical names of system objects.</td>
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<td><img src="image" alt="Syntax Icon" /></td>
<td>Syntax</td>
</tr>
<tr>
<td></td>
<td>These include report names, program names, transaction codes, table names, and key concepts of a programming language when they are surrounded by body text, for example, SELECT and INCLUDE.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Example text</td>
<td>Output on the screen.</td>
<td></td>
<td></td>
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</tr>
<tr>
<td></td>
<td>This includes file and directory names and their paths, messages, names of variables and parameters, source text, and names of installation, upgrade, and database tools.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Example text</td>
<td>Exact user entry.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>These are words or characters that you enter in the system exactly as they appear in the documentation.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>&lt;Example text&gt;</td>
<td>Variable user entry.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Angle brackets indicate that you replace these words or characters with appropriate entries to make entries in the system.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EXAMPLE TEXT</td>
<td>Keys on the keyboard, for example, F2 or ENTER.</td>
<td></td>
<td></td>
<td></td>
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1 Introduction

Purpose
This guide describes the process for managing product data across micro-markets for your enterprise. The two processes that compose data management for Retail Price Optimization for SAP DM are as follows:

- **Product Linking** – You can create, edit, and remove Demand Groups, Product Lines, and Price Families

  ![Icon]
  Generally, product linking changes may necessitate updates or changes to the existing market hierarchy.

- **Market Hierarchy Maintenance** – You can create and remove associations between micro-markets and zones or products

  ![Icon]
  You may also choose to update or change micro-market associations within the existing market hierarchy, without changing existing product linking.
2 Product Linking

The term “product linking” describes the process required to structure product data in preparation for modeling. Product linking is performed after you import initial product, price, and cost information.

Product linking comprises three primary elements:

- Demand groups
- Product lines
- Price families

Once these elements are set up, you can refine information to improve model quality and to review and post data.

2.1 Viewing Product Links

Use

You can follow this procedure to view the current state of product linking within your system.

Prerequisites

Product, price, and cost information have been imported during customization. To learn more about importing product, price, and cost information, see the Customizing Guide for SAP DM.

Procedure

   The Product Linking page appears.

2. Expand the product hierarchy tree in the Product Hierarchy section using the plus sign until you reach the levels for the desired products.

   Initially, the product hierarchy tree appears collapsed at the Enterprise level.

3. To filter the products, select the checkboxes for the desired product names in the product hierarchy tree.

4. Select a column to filter from the Filter By dropdown list.

5. Type a value to filter for in the Filter Value textbox.

6. Click Filter.

7. Click Apply.

Products appear in page format in the Product Linking table.
2.1.1 **Product Linking Table**

You can view, customize, and sort the following columns in the *Product Linking* table:

<table>
<thead>
<tr>
<th><strong>Product Key</strong></th>
<th><strong>SKU</strong></th>
<th><strong>Short Name</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Long Name</td>
<td>Style Key</td>
<td>External Style ID</td>
</tr>
<tr>
<td>Color Code</td>
<td>External Color Code</td>
<td>Size Code</td>
</tr>
<tr>
<td>External Size Code</td>
<td>Dimension Code</td>
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</tr>
<tr>
<td>Brand Key</td>
<td>External Brand ID</td>
<td>Manufacturer Key</td>
</tr>
<tr>
<td>External Manufacturer ID</td>
<td>Manufacturer Part Number</td>
<td>Supplier Key</td>
</tr>
<tr>
<td>Supplier Part Number</td>
<td>Product Line Key</td>
<td>External Product Line ID</td>
</tr>
<tr>
<td>Work Product Line</td>
<td>Temporary Product Line Criteria</td>
<td>Price Family Key</td>
</tr>
<tr>
<td>External Price Family ID</td>
<td>Work Price Family</td>
<td>Demand Group Name</td>
</tr>
<tr>
<td>Demand Group Key</td>
<td>External Demand Group ID</td>
<td>Work Demand Group</td>
</tr>
<tr>
<td>Control Group</td>
<td>Buy UOM Code</td>
<td>Buy UOM Value</td>
</tr>
<tr>
<td>Weight UOM</td>
<td>Sell UOM Code</td>
<td>Sell UOM Value</td>
</tr>
<tr>
<td>Portion UOM Code</td>
<td>Portion UOM Value</td>
<td>Height</td>
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<tr>
<td>Width</td>
<td>Depth</td>
<td>Weight</td>
</tr>
<tr>
<td>Units Per Retail Case</td>
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<td>Package Size</td>
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<td>Attribute 5 Numeric</td>
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<td>Attribute 1 Alpha</td>
<td>Attribute 2 Alpha</td>
<td>Attribute 3 Alpha</td>
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<td>Attribute 4 Alpha</td>
<td>Attribute 5 Alpha</td>
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<td>Pre-Priced</td>
<td>POS Priced Prompt</td>
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<tr>
<td>Sellable</td>
<td>Date Added</td>
<td>Date Discontinued</td>
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<tr>
<td>Used</td>
<td>Cost</td>
<td>Notes</td>
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<td>Error Code</td>
<td>Price</td>
<td>Private Label ID</td>
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<tr>
<td>Product Hierarchy Key</td>
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<td>L10 Number</td>
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<td>L10 Name</td>
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</tbody>
</table>
For detailed information on editing and sorting columns, see the Retail Price Optimization Guide for SAP DM.

You can access additional pages the Product Linking table either by using the scroll bar on the right side of the table or the right and left arrows found below the table. Tables are updated after you have completed sorting and editing columns.

To highlight a product in the Product Linking table, click the corresponding row in the table for the desired product name. If you want to highlight multiple products that are adjacent in the Product Linking table, highlight the first desired product, and then press SHIFT until you highlight the last desired product. If you want to highlight multiple products that are not adjacent in the table, highlight the first desired product, and then press CTRL while you highlight the other desired products.

### 2.2 Linking Demand Groups

#### 2.2.1 Inferring Demand Groups

**Use**

You must infer relationships among products that cannibalize each other or have the same seasonality patterns to establish a starting point for demand groups.

**Prerequisites**

Product, price, and cost information have been imported during customization. To learn more about importing product, price, and cost information, see the Customizing Guide for SAP DM.

If no demand groups exist, only the Demand Group tab is available on the Product Linking page until inferring is complete.

**Procedures**

**If There Are No Demand Groups**

1. To infer demand groups, choose Data Management → Product Linking.
   
   The Product Linking page appears.
2. Choose the Demand Groups tab.
   
   The Demand Groups tab page appears.
3. Select the product hierarchy aggregated name (for example, category or department) to infer from the Default To dropdown list.
4. Click All Products in the Scope box.
5. Click Infer.

   All products are inferred, and demand groups appear in the Demand Group Name column of the Product Linking table.
Inferring Selected Demand Groups

1. To infer selected demand groups, choose Data Management→Product Linking.
   The Product Linking page appears.

2. Choose the Demand Groups tab.
   The Demand Groups tab page appears.

3. Expand the product hierarchy tree in the Product Hierarchy section using the plus sign until you reach the levels for the desired products.
   Initially, the product hierarchy tree appears collapsed at the Enterprise level.

4. To filter the products to infer, select the checkboxes for the desired product names in the product hierarchy tree.

5. Click Apply.
   Products appear in page format in the Product Linking table.

6. Highlight the desired products in the Product Linking table (see Product Linking Table for more information on highlighting products).

7. Select the product hierarchy aggregated name (for example, category or department) to infer from the Default To dropdown list.

8. Click one of the following options in the Scope box:
   - Only Selected Products infers only products you highlighted.
   - Only New Products infers only new products.
   - Only Filtered Products infers only products filtered by hierarchy and filter selections.
   - All Products infers all products.
   If you choose All Products, a warning message alerts you that selecting this option clears all existing demand group information.

9. Click Infer.
   Demand groups are added to the Product Linking table.

   To ensure the Work Demand Group of the inferred product line is unique, the name format is the product hierarchy + sequence number ending with a concatenated _K.

   To reverse this process, highlight the desired products in the Product Linking table, and then click Reset to Ext DG Id. No demand groups are inferred.

2.2.2 Creating Demand Groups

Use

Follow this procedure to create a new demand group.
Prerequisites
Product, price, and cost information were imported during customizing. To learn more about importing product, price, and cost information, see the Customizing Guide for SAP DM.

Procedure
1. To create a new demand group, choose Data Management→DG Maintenance.
   The DG Maintenance page appears. The Demand Groups table appears on the left side of the page.
2. Click Add Group.
   The Add Demand Group dialog box appears.
3. Type a name for the new demand group in the Add Demand Group dialog box.
   A demand group name must adhere to the following application naming conventions:
   • Must be between 5 to 50 characters long
   • Can be alphanumeric
4. Click OK.
   If you enter an existing name, an error message appears and you must type a new name. If you enter a name that is not 5 to 50 characters long, an error message appears and you must type a new name.
   The demand group is added to the display list and is selected.
5. Expand the product hierarchy tree in the Product Hierarchy section using the plus sign until you reach the levels for the desired products.
6. To add products to the new demand group, select the checkboxes for the desired product names in the Product Hierarchy table.
7. Click Update.
   New entries appear in the Product List section.

2.2.3 Editing Demand Groups

Use
You can edit the demand group to add and remove products from an existing demand group.

Prerequisites
Product, price, and cost information were imported during customizing. To learn more about importing product, price, and cost information, see the Customizing Guide for SAP DM.
Procedures

Adding Products to Demand Groups
   The DG Maintenance page appears. The Demand Groups table appears on the right side of the page.
2. Highlight the name of the desired demand group by clicking the corresponding row in the Demand Group table.
   • The product hierarchy level associated with the products in the demand group you select appears in the Product Hierarchy table and is shaded grey.
   • The products belonging to the demand group you select appear in the Product List table. A check appears in the Select column for each product you select.
3. To choose products to add to the demand group, select the checkboxes for the product hierarchy level in the Product Hierarchy table.
   Only products not assigned to a demand group appear in the Product List section. The products that belong to the hierarchy level you selected in the Product Hierarchy table appear as unselected in the Product List table.
4. In the Product List table, select the checkboxes for the products to assign to the demand group.
5. Click Update.
   The DG Key column appears with updated values in the Product List section.

Changing the Name of Demand Groups
1. To rename a demand group, right-click the desired demand group name in the Demand Groups table.
   The Edit Group Name dialog box appears.
2. Type a name for the new demand group in the Edit Group Name dialog box.
   A demand group name must adhere to the following application naming conventions:
   • Must be between 5 to 50 characters long
   • Can be alphanumeric
3. Click Update.
   If you select an existing name, an error message appears and you must choose a new name. If you select a name that is not 5 to 50 characters long, an error message appears and you must choose a new name.

The demand group name is updated, and the Demand Group table displays the new name.

While updating demand groups, the checkbox for the product is left blank if not selected in the product list. This allows you to remove products from a demand group. However, the product still appears in the product list if it is in the product hierarchy level you selected.

The application verifies whether the product is in another demand group. If so, the product appears unselected in the product list.
2.2.4 Deleting Demand Groups

Use
You can delete products from an existing demand group.

Prerequisites
Product, price, and cost information were imported during customizing. To learn more about importing product, price, and cost information, see the Customizing Guide for SAP DM.

Procedure
   The DG Maintenance page appears. The Demand Groups table appears on the right side of the page.
2. Highlight the desired demand group by clicking the corresponding row in the Demand Groups table.
3. Click Delete.
   A confirmation message appears asking you if you want to delete the demand group. Click Yes. The demand group is removed from the list. The relationship between the demand group and the products in that demand group is broken. Records are deleted.

   To cancel this process, click No in the confirmation message.

2.2.5 Breaking Demand Groups

Use
You can break a product or group of products into a new demand group.

Prerequisites
Product, price, and cost information were imported during customizing. To learn more about importing product, price, and cost information, see the Customizing Guide for SAP DM.

Procedure
   The Product Linking page appears.
2. To filter the products to break out, select the checkboxes for the product names in the Product Hierarchy table.
3. Click Apply.
   Products appear in page format in the Product Linking table.
4. Highlight the desired products in the Product Linking table (see Product Linking Table for more information on highlighting products).

5. If you highlighted only one product, double-click the corresponding row for the product. If you highlighted multiple products, double-click any of the corresponding rows for the products with the right mouse button.

The Manually Change Selected Values dialog box appears.

6. Click Change to New Demand Group in the Demand Group Actions box.

7. Type a name for the new demand group in the Change to New Demand Group dialog box.

A demand group name must adhere to the following application naming conventions:

- Must be between 5 to 50 characters long
- Can be alphanumeric

8. Click Apply.

If you select an existing name, an error message appears and you must choose a new name. If you select a name that is not 5 to 50 characters long, an error message appears and you must choose a new name.

The new demand group appears in the Demand Group column for the selected products. New records are created.

This process generates a new demand group key; the Demand Group IP format is the <sequence number> ending with a concatenated _K.

To cancel this process, click Cancel.

### 2.2.6 Merging Demand Groups

#### Use

You can use the merge function to override the demand group for a set of products.

#### Prerequisites

Product, price, and cost information have been imported during customization. To learn more about importing product, price, and cost information, see the Customizing Guide for SAP DM.

#### Procedure


   The Product Linking page appears.

2. To filter the products to merge, select the checkboxes for the desired product names in the Product Hierarchy table.

3. Click Apply.

   Products appear in page format in the Product Linking table.

4. Highlight the desired products in the Product Linking table (see Product Linking Table for more information on highlighting products).
5. If you highlighted only one product, double-click the corresponding row for the product. If you highlighted multiple products, double-click any of the corresponding rows for the products with the right mouse button.

The Manually Change Selected Values dialog box appears.

6. Click Change to Existing Demand Group in the Demand Group Actions box.

7. Select the desired demand group from the Change to Existing Demand Group dropdown list.

8. Click Apply.

The selected demand group appears in the Demand Group column for the products you highlighted.

To cancel this process, click Cancel.

2.3 Linking Product Lines

2.3.1 Inferring Product Lines

Use
It may be necessary to infer relationships among similar products of different sizes to create a starting point for product lines.

Prerequisites
Product, price, and cost information have been imported during customization. To learn more about importing product, price, and cost information, see the Customizing Guide for SAP DM.

Procedure

The Product Linking page appears.

2. Choose the Product Lines tab.

The Product Lines tab page appears.

3. To filter the list of products to infer, select the checkboxes for the product names in the Product Hierarchy table.

4. Click Apply.

Products appear in page format in the Product Linking table.

5. Select a column to filter from the Filter By dropdown list.

6. Type a value to filter for in the Filter Value textbox.

7. Click Filter.

The Filter button changes to Clear Filter.

8. Highlight the desired products in the Product Linking table (see Product Linking Table for more information on highlighting products).
9. From the **Product Lines** tab page, click one of the following options in the **Criteria** box:
   - **Short Name** includes all products where the first \(<N>\) characters of the description match.
   - **Short Name & Manufacturer** includes all products where the first \(<N>\) characters of the description and manufacturer match.

10. To set the \(<N>\) value of the description match, enter a number in the textbox contained in *Break at space if less than or use first* \(<\text{numerical_value}>\) chrs.

11. Click one of the following options in the **Scope** box:
   - **Only Selected Products** infers only products you highlighted.
   - **Only New Products** infers only new products.
   - **Only Filtered Products** infers only products filtered by hierarchy and filter selections.
   - **All Products** infers all products.

12. Select or deselect **Use existing product lines** in the **Options** box.
    
    If **Use existing product lines** is selected, the application tries to match to an existing product line before creating a new product line.

13. Click **Infer**.

    Product lines are inferred. Product lines are displayed in the **Work Product Line** column of the **Product Linking** table.

    To ensure the *Work Product Line* value of the inferred product line is unique, the name format is the \(<\text{sequence number}>\) ending with a concatenated _K.

### 2.3.2 Editing Product Lines

**Use**

You can edit the product line to a new or existing product line.

**Prerequisites**

Product, price, and cost information have been imported during customization. To learn more about importing product, price, and cost information, see the *Customizing Guide for SAP DM*.

**Procedures**

**Change an Existing Product Line**

1. Choose *Data Management*→*Product Linking*.
   
The **Product Linking** page appears.

2. Choose the **Product Lines** tab.
   
The **Product Lines** tab page appears.

3. To filter the products to edit, select or deselect the checkboxes for the desired product names in the **Product Hierarchy** table.

4. Click **Apply**.
5. Highlight the desired products in the Product Linking table (see Product Linking Table for more information on highlighting products).

6. If you highlighted only one product, double-click the corresponding row for the product. If you highlighted multiple products, double-click any of the corresponding rows for the products with the right mouse button.

   The Manually Change Selected Values dialog box appears.

7. Click Change to an Existing Product Line in the Product Lines Actions box.

8. Type the desired product line name in the textbox.

   If you type the name of a product line that doesn’t exist, a dialog box appears, that directs you to enter an existing product line. Click OK.

9. Click Apply.

   To ensure the Product Line ID of the inferred Product Line is unique, the name format is the <sequence number> ending with a concatenated _K.

**Change a New Product Line**


   The Product Linking page appears.

2. Choose the Product Lines tab.

   The Product Lines tab page appears.

3. To filter the products to edit, select or deselect the checkboxes for the desired product names in the Product Hierarchy table.

4. Click Apply.

5. Highlight the desired products in the Product Linking table (see Product Linking Table for more information on highlighting products).

6. Choose the Break/Merge Options tab.

   The Break/Merge Options tab page appears.

7. Click one of the following options in the Product Line Actions box:

   • Set ALL to New PL generates a new product line key and assigns every highlighted product to the new product line.

   • Set EACH to new PL loops through the selected products and generates a new product line key for each selected product.

   • Do Not Change (default) updates nothing.

8. Click Break/Merge.

   The Work Product Line column in the Product Linking table displays new values for the products you highlighted.

   Product lines cannot cross demand groups. If this occurs, you are notified when you perform the Applying Rules step.

   To cancel this process, click Cancel.
2.3.3 Breaking Product Lines

Use
You can break a product or group of products into a different product line.

Prerequisites
Product, price, and cost information have been imported during customization. To learn more about importing product, price, and cost information, see the Customizing Guide for SAP DM.

Procedures
   The Product Linking page appears.
2. To filter the products to break out, select the checkboxes for the product names in the Product Hierarchy table.
3. Click Apply.
4. Highlight the desired products in the Product Linking table (see Product Linking Table for more information on highlighting products).
5. If you highlighted only one product, double-click the corresponding row for the product. If you highlighted multiple products, double-click any of the corresponding rows for the products with the right mouse button.
   The Manually Change Selected Values dialog box appears.
6. Click Change to a New Product Line in the Product Lines Action box.
   When you choose Change to a New Product Line, you are changing to a different product line rather than creating a new product line.
   If you type the name of a product line that doesn’t exist, a message appears, directing you to enter an existing product line. Choose OK.
7. Click Apply.
   The Work Product Line column in the Product Linking table displays new values for the products you highlighted.
   To ensure the Work Product Line value of the inferred product line is unique, the name format is the <sequence number> ending with a concatenated _K.

2.3.4 Merging Product Lines

Use
You can use the merge function to override the product line for a set of products.

Prerequisites
Product, price, and cost information have been imported during customization. To learn more about importing product, price, and cost information, see the Customizing Guide for SAP DM.
Procedures
   The Product Linking page appears.
2. To filter the products to merge, select the checkboxes for the desired product names in the Product Hierarchy table
3. Click Apply.
4. Highlight the desired products in the Product Linking table (see Product Linking Table for more information on highlighting products).
5. If you highlighted only one product, double-click the corresponding row for the product. If you highlighted multiple products, double-click any of the corresponding rows for the products with the right mouse button.
   The Manually Change Selected Values dialog box appears.
6. Click Change to Existing Product Line in the Product Line Actions box.
7. Type the desired product line in the textbox.
8. Click Apply.

To cancel this process at any time, click Cancel.

2.3.5 Resetting Product Lines

Use
To return a product line to the default submitted by the client, reset the product line on the Product Linking page.

Prerequisites
Product, price, and cost information have been imported during customization. To learn more about importing product, price, and cost information, see the Customizing Guide for SAP DM.

Procedure
2. The Product Linking page appears.
3. Choose the Product Lines tab.
   The Product Lines tab page appears.
4. To filter the products to reset, select the checkboxes for the desired product names in the Product Hierarchy table.
5. Click Apply.
   Products appear in page format in the Product Linking table.
6. Click one of the following options in the *Scope* box:
   - *Only Selected Products* resets only products you selected.
   - *Only New Products* resets only new products.
   - *Only Filtered Products* resets only products filtered by hierarchy and filter selections.
   - *All Products* resets all products in the *Product Line* tab.

   ![Warning]
   If you choose *All Products*, a warning message alerts you that selecting this option clears all existing demand group information.

7. Click Reset to Ext PL Id.

### 2.4 Linking Price Families

#### 2.4.1 Inferring Price Families

**Use**

It may be necessary to infer relationships among similar products with varying characteristics to create a starting point for price families.

**Prerequisites**

Product, price, and cost information have been imported during customization. To learn more about importing product, price, and cost information, see the *Customizing Guide for SAP DM*.

**Procedure**

1. **To infer price families, choose Data Management→Product Linking.**
   The *Product Linking* page appears.

2. Choose the *Price Families* tab.
   The *Price Families* tab page appears.

3. To filter the list of products to link, select or deselect the checkboxes for the desired product names in the *Product Hierarchy* table.

4. Click *Apply*.

5. **Click one of the following options in the *Criteria* box:**
   - *Price* sets all products with the same price and same product line to the same price family key.
   - *Cost* sets all products with the same cost and same product line to the same price family key.
   - *Effective Size* sets all products with the same effective size and same product line to the same family price key.

6. **Click one of the following options in the *Scope* box:**
   - *Only Selected Products* infers only selected products in the *Price Families* tab.
   - *Only New Products* infers only new products in the *Price Families* tab.
   - *Only Filtered Products* infers only products filtered by hierarchy and filter panel in the *Price Families* tab.
   - *All Products* infers all products in the *Price Families* tab.
7. Select Use existing price families in the Options box.
The application tries to match to an existing price family before creating a new one.

8. Click Infer.
Price families are inferred. Price families appear in the Price Family column of the Product Linking table. If product lines exist for the selected products, they are used; otherwise, price families are created based only on the criteria selected.

To ensure the Price Family ID of the inferred Price Family is unique, the name format is the sequence number ending with a concatenated _K.

### 2.4.2 Editing Price Families

The Product Linking page appears.

2. Choose the Price Families tab.
The Price Families tab page appears.

3. To filter the list of products to edit, select or deselect the checkboxes for the desired product names in the Product Hierarchy table.

4. Click Apply.

5. Highlight the desired products in the Product Linking table (see Product Linking Table for more information on highlighting products).

6. Choose the Break/Merge Options tab.
The Break/Merge Options tab page appears.

7. To create a new price family, click the desired option(s) in the Price Family Actions box:
   - Set ALL to new PF generates a new price family key and assigns every highlighted product to the new price family.
   - Set EACH to new PF loops through the selected products and generates a new price family key for each product.

   - Infer selected items:
     - Using Price sets all products with the same price, the same product line, and the same demand group to the same price family key.
       This function enables the Force Eff Size options (see Editing Effective Size):
       - Force to Min
       - Force to Max
       - Do Not Change (Default)
     - Using Cost sets all products with the same cost and same demand group to the same price family key.
       This function enables the Force Eff Size options (see Editing Effective Size):
       - Force to Min
       - Force to Max
       - Do Not Change (Default)
- Using Eff Size sets all products with the same effective size and same demand group to the same price family key.
  This function disables Force Eff Size options.
- Do Not Change updates no information about price families.

8. Click Break/Merge.

To ensure that the Price Family ID of the edited price family is unique, the name format is the <sequence number> ending with a concatenated _K.

### 2.4.3 Resetting Price Families

#### Use
To return a price family to the default value submitted by the client, reset the price family on the Product Linking page.

#### Prerequisites
Product, price, and cost information have been imported during customization. To learn more about importing product, price, and cost information, see the Customizing Guide for SAP DM.

#### Procedure
   The Product Linking page appears.
2. Choose the Price Families tab.
   The Price Families tab page appears.
3. To filter the list of products to reset, select or deselect the checkboxes for the desired product names in the Product Hierarchy table.
4. Click Apply.
5. Click one of the following options in the Scope box:
   - Only Selected Products resets only the products selected in the Product Linking tab.
   - Only New Products resets only new products.
   - Only Filtered Products resets only products filtered by hierarchy and filter panel in the Product Linking tab.
   - All Products resets all products in the Product Line tab.

   **⚠️** If you choose All Products, a warning message alerts you that selecting this option clears all existing demand group information.

6. Click Reset to Ext PF Id.
3 Editing Values

3.1 Editing Effective Size

Use
You can change the effective size for products by allowing the application to force the effective size based on conditions you set.

Prerequisites
Product, price, and cost information have been imported during customization. To learn more about importing product, price, and cost information, see the Customizing Guide for SAP DM.

Procedure

Forcing Effective Size
   The Product Linking page appears.
2. To filter the list of products to edit, select or deselect the checkboxes for the desired product names in the Product Hierarchy table.
3. Click Apply.
4. Highlight the desired products in the Product Linking table (see Product Linking Table for more information on highlighting products).
5. Choose the Break/Merge Options tab.
   The Break/Merge Options tab page appears.
   Options in the Effective Size Adjustments box are disabled if the price family is inferred based on effective size (see Inferring Price Families).
6. Click an option for forcing effective size in the Effective Size Adjustments box:
   - Force to Min Eff Size
   - Force to Max Eff Size
   - Do Not Change (default); if selected, the system is not changed.
7. Click Break/Merge.
   The effective size is set to the new value.

3.2 Editing Unit of Measure

Use
You can align the unit of measure for product lines either manually or by allowing the application to infer the unit of measure.
**Prerequisites**

- Product, price, and cost information have been imported during customization. To learn more about importing product, price, and cost information, see the *Customizing Guide for SAP DM*.
- Product lines have been defined or are being inferred in this procedure.
- Multiple unit-of-measure entries exist for a product line.

**Procedures**

**Inferring Unit of Measure Only**

1. Choose *Data Management→Product Linking*.
   
   The *Product Linking* page appears.

2. Choose the *Break/Merge Options* tab.
   
   The *Break/Merge Options* tab page appears.

3. To filter the list of products to edit, select or deselect the checkboxes for the desired product names in the *Product Hierarchy* table.

4. Click *Apply*.

5. Highlight the desired products in the *Product Linking* table (see *Product Linking Table* for more information on highlighting products).

6. Select *Align UofM* in the *Unit of Measure Actions* box.

7. Click *Break/Merge*.

**Inferring Unit of Measure and Product Lines**

1. Choose *Data Management→Product Linking*.
   
   The *Product Linking* page appears.

2. Choose the *Break/Merge Options* tab.
   
   The *Break/Merge Options* tab page appears.

3. To filter the list of products to edit, select or deselect the checkboxes for the desired product names in the *Product Hierarchy* table.

4. Click *Apply*.

5. Highlight the desired products in the *Product Linking* table (see *Product Linking Table* for more information on highlighting products).

6. Under, click a product line infer option in the *Product Line Actions* box:
   
   - *Set ALL to new PL* infers all products to a new product line
   - *Set EACH to new PL* infers selected products to a new product line
   - *Do Not Change* (default) changes nothing

7. Select *Align UofM* in the *Unit of Measure Actions* box.

8. Click *Break/Merge*.

   The application infers product lines first, since product lines must be set before inferring *UofM*.
4 Rules

4.1 Creating Rules

Use
You can create a new rule.

Procedure
   The Rule Maintenance page appears with a list of rules currently in the system.
2. Click Add.
   A new default rule is added to the list of rules on the screen with the following fields:
   - Rule Name = New Rule
   - Enabled = checked
   - Rule Type = Error
   - Error Code = New Rule
   - Rule SQL = New Rule
3. Change the values in any of the following fields:
   - Rule Name
   - Error Code
   - Rule SQL
   - Rule Type
   - Enabled
4. Click Add.

   If a validation error occurs, a message appears notifying you of the violation:
   - Name already exists
   - Name is empty
   - Error Code is empty
   - SQL is empty
   Click OK, and then make the necessary corrections.

4.2 Editing Rules

Use
You can edit an existing rule.
Procedure

   The Rule Maintenance page appears with a list of rules currently in the system.

2. Change a value in any of the following fields:
   - Name
   - Error Code
   - SQL (specifies only the “where” clause of the SQL)
   - Rule Type
   - Enabled

3. Click Update.

   If a validation error occurs, a message appears notifying you of the violation:
   - Name already exists
   - Name is empty
   - Error Code is empty
   - SQL is empty

   Click OK, and then make the necessary corrections.

   Because the Rule SQL text in the Rule Maintenance page shows only the “where” clause of the Rule SQL, you are not able to enter any SQL statement that might delete the relevant data or modify any data contents which might be a security issue for this or other applications. UPDATE, DELETE, TRUNCATE, and INSERT keywords are not allowed while specifying the Rule SQL.

4.3 Deleting Rules

Use
You can delete an existing rule.

Procedure

   The Rule Maintenance page appears with a list of rules currently in the system.

2. Highlight a rule from the list by clicking the desired rule name in the list of rules.

3. Click Delete.

   A message appears asking you to confirm you want to delete the rule. Click Yes. The rule disappears from the screen. The next rule in the list (if any) is highlighted.

   To cancel this process, click No.
4.4 Applying Rules

**Use**
You can run a set of queries that identifies problem products and creates a list of rules that have been violated.

**Prerequisites**
Product, price, and cost information have been imported during customization. To learn more about importing product, price, and cost information, see the Customizing Guide for SAP DM.

**Procedure**
   The Product Linking page appears.
2. Choose the Rules tab.
   The Rules tab page appears with the Rules table, which contains a hierarchy tree of enabled rules. The Rules table is filtered to only those rules that have the Enabled setting checked in the Rules Maintenance screen.
3. Select the checkboxes for the desired rules in the Rules table or click Select All to select all of the rules.
4. Click one of the following options in the Rules Scope box:
   - Only Selected Products runs rule(s) over selected products.
   - Only Filtered Products runs rule(s) over filtered products.
   - All Products runs rule(s) over all products.
5. Click Apply.
   - Existing error codes for all products in the selected Scope are removed before rules run.
   - New error codes are displayed for products selected in Scope.
   - Multiple errors are listed.

4.5 Correcting Error Codes

**Use**
To fix a broken rule, you can correct and reset the error code.

**Prerequisites**
Product, price, and cost information have been imported during customization. To learn more about importing product, price, and cost information, see the Customizing Guide for SAP DM.
Procedure

1. Choose *Data Management*→*Product Linking*.
   The *Product Linking* page appears.

2. To filter the list of products, select or deselect the checkboxes for the desired product names in the *Product Hierarchy* table.

3. Correct errors using the appropriate edit function.
   
   ![You can change a price family using *Edit a Price Family*.](image)

4. Choose the *Rules* tab.
   The *Rules* tab page appears.

5. Click *Reset Error Codes*.
   The *Error Code* field is cleared for the selected products.
5 Reviewing Products

If a client sends exterior IDs with values different from previous imports, a message appears telling you that product linking has changed and a product review is mandatory.

Changes to any of the following information trigger a message:

- Ext Price Family ID
- Ext Product Line ID
- Ext Demand Group ID
- Effective Size
- Unit of Measure

5.1 Reviewing Products

Use

Product Linking, Rule Maintenance, and Demand Group Maintenance pages are disabled as long as there are products that must be reviewed. You must check identified products under the Review Products tab before you can proceed.

Prerequisites

Product, price, and cost information have been imported during customization. To learn more about importing product, price, and cost information, see the Customizing Guide for SAP DM.

Procedure

   
The Review Products page appears with a list of products.

2. Review these products before you proceed with product linking.

   The upper table displays products you must review, indicated by checkboxes on the left.

   The lower table shows products which have been filtered by Demand Group, Product Line, or Price Family, based on the selection from the upper table. This table also lists all products in the previous and new Demand Groups, Product Lines, or Price Families.

5.2 Accepting Client Values

The following sections explain how to clear the products appearing in the upper table.

Use

You can choose to accept the values submitted for Demand Group, Product Line, Price Family, Effective Size and Unit of Measure. If you accept the values submitted, the application overwrites previous product linking information.
Prerequisites
Product, price, and cost information have been imported during customization. To learn more about importing product, price, and cost information, see the Customizing Guide for SAP DM.

Procedure
   The Review Products page appears with a list of products.
2. To accept values for all products in the list, select Select All from the Action dropdown list, and then click Apply.
3. To accept values for selected products in the list, select the checkbox adjacent to each acceptable product.
4. Click Accept Client Changes.
   The PL_Change_Flag field is cleared and set to 0 for the products selected.
   Nothing is updated for previous and new values for Demand Group, Product Line, Price Family, Effective Size or Unit of Measure.

5.3 Ignoring Client Values

Use
You can choose to ignore the values submitted for:
- Demand Group
- Product Line
- Price Family
- Effective Size
- Unit of Measure

If you ignore submitted values, the application reverts to the previous product linking information, regardless of the values submitted.

Prerequisites
Product, price, and cost information have been imported during customization. To learn more about importing product, price, and cost information, see the Customizing Guide for SAP DM.

Procedure
   The Review Products page appears with a list of products.
2. To ignore client values for all products in the list, select Select All from the Action dropdown list, and then click Apply.
3. To ignore client values for selected products in the list, select the checkbox adjacent to each unacceptable product.
4. Click Ignore Client Changes.
5.4 Filtering by Demand Groups

Use
You can filter products by demand group in the Review Products screen and tab. This function creates a list of all products in the previous and new demand groups.

Prerequisites
Product, price, and cost information have been imported during customization. To learn more about importing product, price, and cost information, see the Customizing Guide for SAP DM.

Procedure
   The Review Products page appears with a list of products.
2. Highlight products to filter by clicking the desired product names in the upper table.
   If you want to highlight multiple products that are adjacent in the upper table, highlight the first desired product, and then press SHIFT until you highlight the last desired product. If you want to highlight multiple products that are not adjacent in the table, highlight the first desired product, and then press CTRL while you highlight the other desired products.
3. Click Filter by Demand Groups.
   The lower table displays all products in the previous and new demand groups for the demand group value in the selected products.

5.5 Filtering Product Lines

Use
You can filter products by product line in the Review Products screen. This function creates a list of all products in the previous and new product lines.

Prerequisites
Product, price, and cost information have been imported during customization. To learn more about importing product, price, and cost information, see the Customizing Guide for SAP DM.

Procedure
   The Review Products page appears with a list of products.
2. Highlight products to filter by clicking the desired product names in the upper table.
   If you want to highlight multiple products that are adjacent in the upper table, highlight the first desired product, and then press SHIFT until you highlight the last desired product. If you want to highlight multiple products that are not adjacent in the table, highlight the first desired product, and then press CTRL while you highlight the other desired products.
3. Click *Filter by Product Lines*. The lower table displays all products in the previous and new product lines for the product line value in the selected products.

### 5.6 Filtering Price Families

**Use**
You can filter products by price family in the *Review Products* screen. This function creates a list of all products in the previous and new price families.

**Prerequisites**
Product, price, and cost information have been imported during customization. To learn more about importing product, price, and cost information, see the *Customizing Guide for SAP DM*.

**Procedure**
   The *Review Products* page appears with a list of products.
2. Highlight products to filter by clicking the desired product names in the upper table.
   
   ![Tip]
   If you want to highlight multiple products that are adjacent in the upper table, highlight the first desired product, and then press *SHIFT* until you highlight the last desired product. If you want to highlight multiple products that are not adjacent in the table, highlight the first desired product, and then press *CTRL* while you highlight the other desired products.
3. Click *Filter by Price Family*.
   The lower table displays all products in the previous and the new price families for the price family value in the selected products.
6 Market Hierarchy Maintenance

The market hierarchy must be routinely maintained and updated as changes to demand groups, product lines, and price families occur within existing micro-markets. Changes to the market hierarchy may also be necessary as changes to associations between micro-markets and zones or products occur.

6.1 Assigning Demand Group Associations

Use
You can manually or automatically assign and remove existing demand group associations at any micro-market hierarchy level of the market hierarchy.

Prerequisites
You must complete the following tasks before you can manually assign demand group associations:
- Import data
- Link products

Procedure
   The System Configuration: Market Hierarchy page appears.
2. Choose the Market Hierarchy Associations tab.
   The Associate Demand Groups/Micro-markets tab page appears with the following:
   - Demand Group List section
   - Micro-Market List section
   - Demand Group Details table
     - Demand Group - name of the demand group selected in the Demand Group List section
     - Micro-Market - name of the micro-market associated with the demand group
     - Product Count - number of products included in the association
   - Micro-Market Details table
     - Micro-Market - name of the micro-market group selected in the Micro-Market List section
     - Demand Group - name of the demand group associated with the micro-market
     - Product Count - number of products included in the association
3. To search for demand groups, click Search in the Demand Groups List section.
   The Advanced Search dialog box appears with the Demand Groups by Criteria and Demand Groups by Hierarchy tab pages. You can select demand groups by description (step 4) or product hierarchy (step 5).
4. To select demand groups by a description, choose the Demand Groups by Criteria tab.

- Description is the only available option in the Search Type dropdown list.

a. Select one of the following options from the Search Constraint dropdown list:
   - Begins With
   - Contains
   - Ends With
   - Equals
   - Not Equal To

b. Type a text value in the Search Text textbox.

- You may choose to specify additional criteria to include in the text search by selecting a Search Option to combine search criteria.

c. Click Add Criteria or Remove Criteria, until you have finished specifying the search criteria. The search criteria appear in the Search Criteria box.

d. Click Execute Search.

   A list of demand groups corresponding to the search criteria appears in the Search Results box.

- If no demand groups meet the search criteria, a message appears to notify you.

e. To add demand groups, highlight one or more demand groups by clicking the corresponding rows in the Search Results box, and then click Add Selected.

- You can click Select All to include all of the search results. If you want to highlight multiple demand groups that are adjacent in the Search Results box, highlight the first desired group, and then press **SHIFT** until you highlight the last desired group. If you want to highlight multiple groups that are not adjacent in the box, highlight the first group, and then press **CTRL** while you highlight the other desired groups.

   The selected demand groups appear in the Selections to Add box.

f. Alternatively, to remove demand groups, highlight one or more demand groups by clicking the corresponding rows in the Selections to Add box, and then click Remove.

- If you want to highlight multiple demand groups that are adjacent in the Selections to Add box, highlight the first desired group, and then press **SHIFT** until you highlight the last desired group. If you want to highlight multiple groups that are not adjacent in the box, highlight the first group, and then press **CTRL** while you highlight the other desired groups.

  The Demand Group selections are correct, and then click OK.

  The Demand Group List displays the selected Demand Groups. Continue to step 6.
5. Alternatively, to select the demand groups by product hierarchy, choose the Demand Groups by Hierarchy tab.

Initially, the product hierarchy tree appears collapsed at the Enterprise level.

a. Expand the product hierarchy tree using the plus (+) sign until you reach the desired level.

b. Highlight the desired level by clicking the corresponding level in the product hierarchy tree.

c. Click Execute Search.

The search results appear in the Search Results box.

If no demand groups meet the search criteria, a message appears to notify you.

d. To add demand groups, highlight one or more demand groups by clicking the corresponding rows in the Search Results box, and then click Add Selected.

You can click Select All to include all of the search results. If you want to highlight multiple demand groups that are adjacent in the Search Results box, highlight the first desired group, and then press SHIFT until you highlight the last desired group. If you want to highlight multiple groups that are not adjacent in the box, highlight the first group, and then press CTRL while you highlight the other desired groups.

The selected demand groups appear in the Selections to Add box.

e. Alternatively, to remove demand groups, highlight one or more demand groups by clicking the corresponding rows in the Selections to Add box, and then click Remove.

If you want to highlight multiple demand groups that are adjacent in the Selections to Add box, highlight the first desired group, and then press SHIFT until you highlight the last desired group. If you want to highlight multiple groups that are not adjacent in the box, highlight the first group, and then press CTRL while you highlight the other desired groups.

f. Verify the demand group selections are correct, and then click OK.

The Demand Group List section displays the selected demand groups.

g. Click Select All.

The demand groups appear in the Demand Group Details table.

6. Highlight individual demand groups or click Select All, located to the lower right of the Demand Group List section.

If you want to highlight multiple demand groups that are adjacent in the Demand Group Details table, highlight the first desired group, and then press SHIFT until you highlight the last desired group. If you want to highlight multiple groups that are not adjacent in the table, highlight the first group, and then press CTRL while you highlight the other desired groups.

The demand groups appear in the Demand Group Details table.


The Advanced Search dialog box appears with the Micro-Market by Criteria and Micro-Market by Hierarchy tab pages. You can search for micro-markets by description (see step 8) or product hierarchy (see step 9.)
8. To search by a description of the micro-market, choose the Micro-Markets by Criteria tab.

- Name is the only available option in the Search Type dropdown list.

a. Select one of the following options from the Search Constraint dropdown list:
   - Begins With
   - Contains
   - Ends With
   - Equals
   - Not Equal To

b. Type a text value in the Search Text textbox.

   - You can specify additional criteria to include in the text search by selecting a Search Option to combine the search criteria.

b. Click Add Criteria or Remove Criteria until you have finished specifying the search criteria.

   - The search criteria appear in the Search Criteria box.

   - Click Execute Search.

   - The search results appear in the Search Results box.

   - If no micro-market names meet the search criteria, a message appears to notify you.

c. To add micro-markets, highlight one or more micro-markets from the Search Results box, and then click Add Selected.

   - You can click Select All to include all of the search results. If you want to highlight multiple micro-markets that are adjacent in the Search Results box, highlight the first micro-market, and then press SHIFT until you highlight the last micro-market. If you want to highlight multiple micro-markets that are not adjacent in the box, highlight the first micro-market, and then press CTRL while you highlight the other desired micro-market.

   - The selected micro-markets appear in the Selections to Add box.

   - To remove micro-markets, highlight one or more micro-markets from the Selections to Add box, and then click Remove.

   - If you want to highlight multiple micro-markets that are adjacent in the Selections to Add box, highlight the first desired micro-market, and then press SHIFT until you highlight the last desired micro-market. If you want to highlight multiple micro-markets that are not adjacent in the box, highlight the first micro-market, and then press CTRL while you highlight the other desired micro-markets.

g. Verify the micro-market selections are correct, and then click OK.

   - The Micro-Market List section displays and the selected Micro-Markets.

Initially, the product hierarchy tree appears collapsed at the Enterprise level.

a. Expand the product hierarchy tree using the plus sign until you reach the desired level.

b. Highlight the desired micro-market level by clicking the corresponding level in the product hierarchy tree.

c. Click Execute Search.

The search results appear in the Search Results box.

If no micro-markets meet the search criteria, a message appears to notify you.

d. To add micro-markets, highlight one or more micro-markets from the Search Results box, and then click Add Selected.

You can click Select All to include all of the search results.

The selected micro-markets appear in the Selections to Add box.

e. Alternatively, to remove micro-markets, highlight one or more micro-markets from the Selections to Add box, and then click Remove.

f. Verify the micro-market selections are correct, and then click OK.

The Micro-Market List section displays the selected micro-markets.

10. Highlight individual micro-markets or click Select All, located to the lower right of the Demand Group List.

To highlight more than one micro-market, press CTRL while continuing to highlight names.

The micro-markets appear in the Micro-Market Details table. You can automatically (see step 11) or manually (see step 12) associate demand groups with micro-markets.

11. To automatically associate selected demand groups with micro-markets, perform the following:

a. Highlight one or more demand groups individually or click Select All from the Demand Group List table.

b. Highlight one or more micro-markets from the Micro-Market List.

c. Click Auto-Assoc. to automatically associate the selected demand group(s) with the micro-market(s).

The Automatic Association Dialog box appears.

d. Click Auto-Associate Selected Demand Groups in the Automatic Association Dialog box.

e. Click OK.

A message appears to confirm the association. Click OK, and then continue to step 13.
12. Alternatively, to manually associate selected demand groups with micro-markets, click **Add Association** for one or more individual demand group selections.

A list of demand group-to-micro-market association(s) appears in the **Demand Group Details** table showing the following:

- Number of products in each demand group
- Micro-market and demand group associations

If navigating away from the **Demand Group Association** tab page before saving your changes, a message appears informing you that unsaved changes are pending and asks you to save or cancel the changes. Click **OK** to save the changes.

13. Click **Validate Associations**.

A confirmation message appears asking you if you want to validate associations. Click **OK**. Invalid association assignments are listed in the **Error Log** table, located on the **Associations Error Log** tab page. See **Viewing the Hierarchy Validation Log** for more information.

### 6.2 Assigning Zone Associations

**Use**

You can manually or automatically assign and remove existing zone associations at any micro-market hierarchy level of the market hierarchy.

**Prerequisites**

You must complete the following tasks before you can assign zone associations:

- Import data
- Create the product hierarchy
- Link products
- Create market hierarchy structure

**Procedure**

1. Choose **Administration & Configuration**→**System Configuration**→**Market Hierarchy Maintenance**.

   The **System Configuration : Market Hierarchy** page appears.

2. Choose the **Market Hierarchy Associations** tab.

3. Choose the **Associate Zones/Micro-markets** tab.

   The **Associate Zones/Micro-markets** tab page appears with the following:

   - **Zone List** section
   - **Micro-Market List** section
   - **Zone Details** table
     - **Zone** - name of the zone selected from the **Zone List** section
     - **Micro-Market** - name of the micro-market associated with the zone
     - **Store Count** - number of stores included in the association
- Micro-Market Details table
  - Micro-Market - name of the zone selected in the Micro-Market List section
  - Zone - name of the micro-market associated with the micro-market
  - Store Count - number of stores included in the association

4. To search for zones, click Search in the Zones List section.

The Advanced Search dialog box appears with the Zones by Criteria tab page. The following steps described the process for selecting zones.

- Description is the only available option in the Search Type dropdown list.
- Select one of the following options from the Search Constraint dropdown list:
  - Begins With
  - Contains
  - Ends With
  - Equals
  - Not Equal To
- Type a text value in the Search Text textbox.
- You can specify additional criteria to include in the text search by selecting a Search Option to combine search criteria.
- Click Add Criteria or Remove Criteria, until you have finished specifying the search criteria.
- The search criteria appear in the Search Criteria box.
- Click Execute Search.
  - A list of zones corresponding to the search criteria appears in the Search Results box.
- If no zones meet the search criteria, a message appears to inform you that no zones meet the search criteria.
- To add zones, highlight one or more zones from the search results list, and then click Add Selected.
  - You can click Select All to include all of the search results.
  - The selected zones appear in the Selections to Add textbox.
- To remove zones, highlight one or more zones from the search results list, and then click Remove.
- Verify the zone selections are correct, and then click OK.
  - The Zone List section displays the selected Zones.

5. Highlight individual zones or click Select All, located to the lower right of the Zone List section.

- To highlight more than one zone, press CTRL while continuing to highlight names.
  - The zones appear in the Zone Details table.
   The Advanced Search dialog box appears, listing the Micro-Markets by Criteria and Micro-Markets by Hierarchy tab pages. You can search for micro-markets by description (see step 7) or product hierarchy (see step 8.)

7. To search by a description of the micro-market, choose the Micro-Markets by Criteria tab.
   The Micro-Markets by Criteria tab page appears.
   ![Name is the only available option in the Search Type dropdown list.]

   a. Select an option from the Search Constraint dropdown list box:
      - Begins With
      - Contains
      - Ends With
      - Equals
      - Not Equal To

   b. Type a text value in the Search Text textbox.
      ![You can specify additional criteria to include in the text search by selecting a Search Option to combine the search criteria.]

   c. Click Add Criteria or Remove Criteria until you have finished specifying the search criteria.
      The search criteria appear in the Search Criteria box.

   d. Click Execute Search.
      The search results appear in the Search Results box.
      ![If no micro-market names meet the search criteria, a message appears to notify you.]

   e. To add micro-market selections, highlight one or more micro-markets from the search results list, and then click Add Selected.
      ![You can click Select All to include all of the search results.]
      The selected micro-markets appear in the Selections to Add box.

   f. Alternatively, to remove micro-markets, highlight one or more micro-markets from the Selections to Add box, and then click Remove.

   g. Verify the micro-market selections are correct, and then click OK.

   Initially, the product hierarchy tree appears collapsed at the Enterprise level.
   ![Initially, the product hierarchy tree appears collapsed at the Enterprise level.]

   a. Expand the product hierarchy tree using the plus ⨿ sign until you reach the desired level.

   b. Highlight the desired micro-market level.
c. Click Execute Search.  
The search results appear in the Search Results box.  

![If no micro-markets meet the search criteria, a message appears to notify you.]

d. To add micro-market selections, highlight one or more micro-markets from the search results list, and click Add Selected.  

![You can click Select All to include all of the search results.]

The selected micro-markets appear in the Selections to Add textbox.

e. Alternatively, to remove micro-market selections, highlight the desired micro-markets, and then click Remove.

f. Verify the micro-market selections are correct, and then click OK.  
The Micro-Market List section displays the selected micro-markets.

9. Highlight individual micro-markets or click Select All, located to the lower right of the Micro-Market List section.

![To select more than one micro-market, press CTRL while continuing to highlight names.]

The micro-markets appear in the Micro-Market Details table. You can automatically (see step 10) or manually (step 11) associate zones with micro-markets.

10. To automatically associate selected zones with a micro-market, perform the following:

a. Highlight zones individually or click Select All from the Zone List section.

b. Highlight one or more micro-markets from the Micro-Market List section.

c. Click Auto-Assoc. to automatically associate the selected zone(s) with the micro-market(s).

The Automatic Association Dialog box appears.

d. Click OK, and then continue to step 12

11. Alternatively, to manually associate selected zones with a micro-market, click Add Association for individual zone selections.

A list of zone-to-micro-market association(s) appears in the Zone Details table showing the following:

- Number of stores in each zone
- Micro-market and zone associations

![If navigating away from the Zone Association tab page, a message appears informing you that unsaved changes are pending and asks you to save or cancel the changes. Click OK to save the changes.]

12. Click Validate Associations.

A confirmation message appears asking you if you want to validate associations. Click OK. Invalid association assignments are listed in the Error Log table, located on the Hierarchy Validation Log tab page. See Viewing the Hierarchy Validation Log for more information.
6.3 Viewing the Hierarchy Validation Log

Use
You can view a list of demand group and zone association assignment errors for the market hierarchy.

Prerequisites
- Assign demand group associations with micro-markets
- Assign zone associations with micro-markets

Procedure
2. Choose the Hierarchy Validation Log tab. The Hierarchy Validation Log tab page appears with the following:
   - Error Log table
     - Error Code
     - Error Count
     - Error Text
     - Date/Time
   - Details table
     - Error Code
     - Severity
     - Micromarket
     - Error Text
     - Date/Time

6.4 Optimization Configuration

Use
You can add or remove a micro-market from retail price optimization when changes are made to the micro-market association assignments for demand groups and/or zones.

Prerequisites
Add or remove a micro-market association with a zone or demand group
6 Market Hierarchy Maintenance

Procedure

   The System Configuration : Market Hierarchy Maintenance page appears.

2. Choose the Optimization Configuration tab.
   The Market Hierarchy Selection table appears with the following columns:
   - Optimize - selecting or unselecting the checkbox in this column adds or removes a micro-market from Retail Price Optimization
   - Micro-Market - name of the micro-market

   Initially, the Micro-Market column is blank.

   The following steps describe the process for finding and selecting micro-markets for optimization configuration.

3. To search for micro-markets, click Search.
   The Advanced Search dialog box appears, listing the Micro-Markets by Criteria and Micro-Markets by Hierarchy tab pages. You can search for micro-markets by description (see step 4) or product hierarchy (see step 5.)

4. To search by a description of the micro-market, choose the Micro-Markets by Criteria tab.

   Name is the only available option in the Search Type dropdown list.

   a. Select one of the following options from the Search Constraint dropdown list:
      - Begins With
      - Contains
      - Ends With
      - Equals
      - Not Equal To

   b. Type a text value in the Search Text textbox.

   You can choose to specify additional criteria to include in the text search by selecting a Search Option to combine the search criteria.

   c. Click Add Criteria or Remove Criteria until you have finished specifying the search criteria.
      The search criteria appear in the Search Criteria box.

   d. Click Execute Search.
      The search results appear in the Search Results box.

   If no micro-market names meet the search criteria, a message appears to notify you.

   e. Highlight one or more micro-markets from the search results list, and then click Add Selected.

   You can click Select All to include all of the search results.

   The selected micro-markets appear in the Selections to Add box.
f. To remove a micro-market selection, highlight the desired micro-market name in the *Selections to Add* box, and then click *Remove*.

g. Verify the micro-market selections are correct, and then click *OK*.

The *Market Hierarchy* table displays the selected micro-markets. The *Micro-Market* column displays the selected micro-markets with the adjacent checkboxes selected in the *Optimize* column of the *Market Hierarchy Selection* table.

5. To search for micro-markets by product hierarchy, choose the *Micro-Markets by Hierarchy* tab.

   Initially, the product hierarchy tree appears collapsed at the *Enterprise* level.

a. Expand the product hierarchy tree using the plus sign you reach the desired level.

b. Highlight the desired micro-market level by clicking the corresponding level in the product hierarchy tree.

c. Click *Execute Search*.

   The search results appear in the *Search Results* box.

   If no micro-markets meet the search criteria, a message appears to inform you that no micro-markets meet the search criteria.

d. Highlight one or more micro-markets from the search results list, and then click *Add Selected*.

   You can click *Select All* to include all of the search results.

   The selected micro-markets appear in the *Selections to Add* box.

e. To remove micro-markets, highlight the desired micro-markets, and then click *Remove*.

f. Verify the micro-market selections are correct, and then click *OK*.

   The *Market Hierarchy Selection* table displays the selected micro-markets. The *Micro-Market* column displays the selected micro-markets with the adjacent checkboxes selected in the *Optimize* column of the *Market Hierarchy Selection* table.

6. If necessary, deselect individual micro-markets or click *Clear All* to deselect all the checkboxes.

7. Verify your changes are correct, and then click *Save*.

### 6.5 Viewing Market Hierarchy Member Details

**Use**

You can view the existing market hierarchy structure.

**Prerequisites**

- Import data
- Create the product hierarchy
- Link products
- Create market hierarchy structure
Procedure

   The System Configuration : Market Hierarchy Maintenance page appears.

2. Choose the Hierarchy Member Details tab.
   The Market Hierarchy section appears with the market hierarchy tree and the Hierarchy Member Details section appears at the bottom of the Market Hierarchy section.

   Initially, the product hierarchy tree appears collapsed at the Enterprise level.

3. Expand the product hierarchy tree using the plus sign until you reach the desired level.

4. Highlight the desired micro-market level by clicking the corresponding level in the product hierarchy tree.
   The highlighted level appears in the Node Name field in the Hierarchy Member Details section.

5. To add a micro-market, click Add Member.
   A new level appears in the market hierarchy tree.

6. To remove a micro-market, highlight an existing micro-market

7. Click Delete Member.
   A confirmation message appears asking you to the deletion. Click OK.

8. Verify your changes are correct, and then click Save.