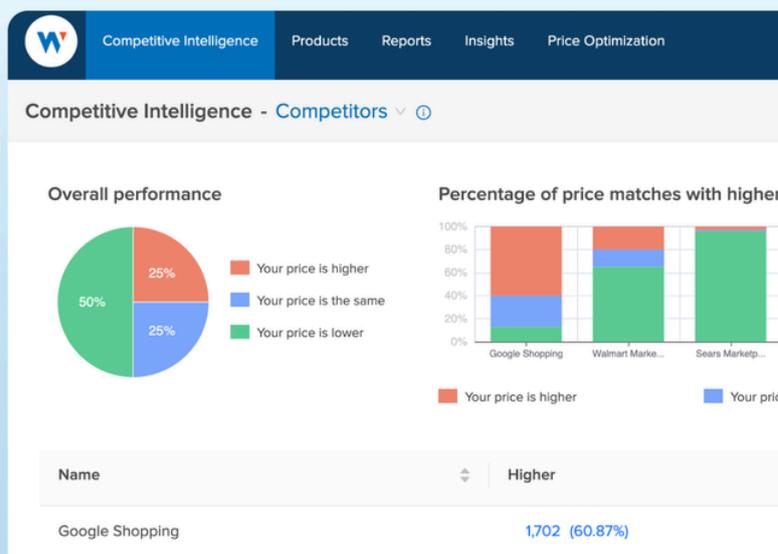


# Price Intelligence Onboarding Guide

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# Introduction

## Welcome to Price Intelligence

This guide introduces the Price Intelligence product and helps you get oriented as you begin using it on a regular basis. Whether you are a new customer or joining an existing team, it is designed to give you clarity and confidence as you get started.

Price Intelligence provides visibility into **how your products are priced across retailers and marketplaces**, helping you understand **competitive positioning** and **pricing behavior at the SKU level**. During onboarding, your Engagement Manager will partner with you to configure your program, validate your data, and guide you through next steps.

This guide focuses on:



How your Price Intelligence program is set up.



What data is collected and how it is refreshed.



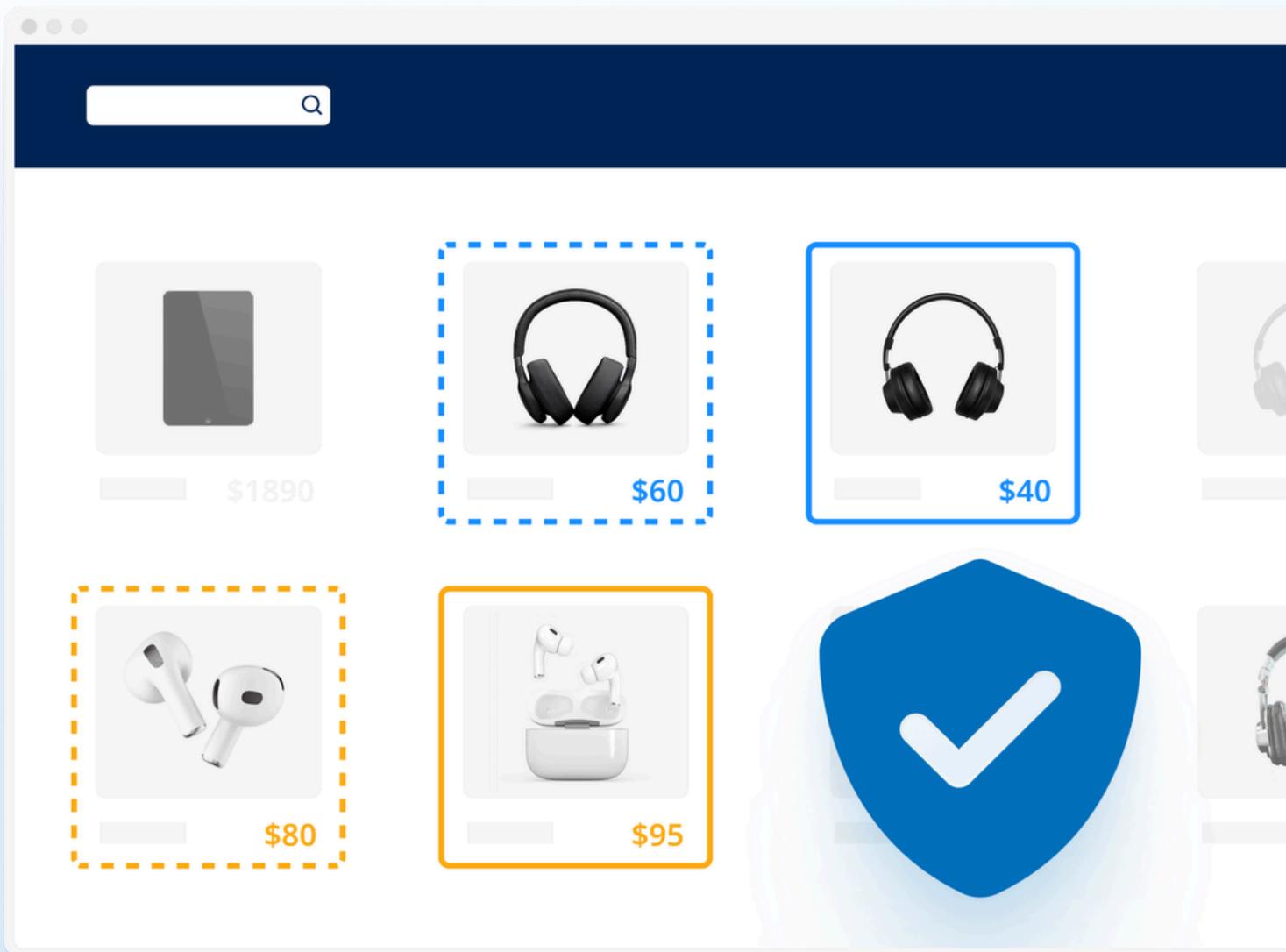
How the product is organized and where to start.

It is not intended to cover every feature or workflow in detail. Additional guides, including the [Price Intelligence Checklist](#) and [Glossary](#), are available to support deeper analysis and ongoing adoption as you become more familiar with the platform.



By the end of this guide, you will understand **what to expect during onboarding**, **how to interpret what you see in the platform**, and **how Price Intelligence supports your pricing decisions from day one**.

# 01 Data Collection and Program Scope



# Data Collection and Program Scope

## How Price Intelligence is configured and how data is collected

Price Intelligence is configured to reflect your business and monitoring needs. Each program is built around the specific products and retailers that matter to you, allowing the platform to focus on relevant competitive pricing activity from the start.

This section outlines how your program is defined, how pricing data is collected, and what to expect as data begins flowing into the platform.

## Product Catalog

- The SKUs you provide form the foundation of your Price Intelligence program. These products are used to identify matches across retailers and marketplaces so pricing comparisons can be made accurately.
- Your product catalog does not need to be perfect on day one. The goal during onboarding is to establish a reliable starting point that can be refined over time as products are added, removed, or updated.

## Retailers and Competitors

- Price Intelligence monitors the retailers and competitor listings defined during onboarding. Depending on your setup, this may include direct retailers, marketplaces, or a combination of both.
- Retailer coverage is determined during program configuration and may vary based on standard monitoring patterns or custom requirements. Your Engagement Manager will confirm which retailers are included as part of your program scope.

## Data Collection and Crawls

- Pricing data is collected through automated crawls of retailer and marketplace sites. These crawls capture product prices and related details so you can monitor competitive activity over time.
- Crawl frequency and coverage are defined during onboarding and may vary depending on your program setup. Some retailers follow standard crawl patterns, while others require additional configuration to ensure data is collected accurately.
- Once crawls are active, pricing data begins appearing in the platform as each retailer is processed.

# Data Collection and Program Scope

## Understanding Data Freshness

As you begin reviewing data, it is helpful to keep a few timing considerations in mind:

- Crawl date reflects the most recent successful data collection for a product.
- Not all retailers update at the same time.
- Some products may refresh sooner than others.

Early views may show partial coverage while crawls complete. This is expected during onboarding and does not indicate an issue with your setup.

## Availability and Observed Prices

Pricing data reflects what was observed during the most recent crawl. Availability plays an important role in interpreting results:

- In-stock products typically provide the most actionable pricing insights.
- Out-of-stock or unavailable products may still appear but should be reviewed with context.
- Some retailers may not consistently expose availability information.

Reviewing availability alongside price helps ensure you are drawing the right conclusions from the data.

### What's Normal During Early Ramp-Up

During the first days of onboarding, you may notice:



Gaps where data is still populating.



Differences in freshness across retailers.



Pricing trends become clearer over time.

This is part of the natural ramp-up process. As additional crawls complete and historical data accumulates, patterns become easier to spot and analyze.

Your Engagement Manager will confirm when your data has stabilized and is ready for broader review.

# 02 Getting Started with Your Template

The screenshot shows a spreadsheet application window with a menu bar (Home, Insert, Draw, Page Layout, Formulas, Data, Review, View, Automate, Tell me) and a toolbar. The spreadsheet contains a table with the following data:

	A	B	C	D	E	F
1	SKU	Product Title	Brand	MPN	UPC	Price
2	SKU-1001	Noise Cancelling Headphones	Brand A	NC-PRO-BLK	851234567801	179.99
3	SKU-2042	Smart Fitness Watch 45mm	Brand B	45-SLV	851234567818	159.99
4	SKU-3300	Portable Bluetooth Speaker	Brand C	NB-3300	851234567825	49.99
5	SKU-1100	Lite Wireless Earbuds	Brand D	LITE-WHT	851234567832	79.99
6	SKU-2100	Active Fitness Tracker	Brand E	AFT-01	851234567849	89.99
7	SKU-3400	Home Smart Speaker	Brand F	NB-3400	851234567856	99.99
8	SKU-5001	Wireless Charging Dock	Brand G	ZC-5001	851234567863	69.99
9	SKU-7000	Desk Lamp Pro	Brand H	A-7000	851234567870	59.99
10						
11						
12						

# Getting Started with Your Template

## How to share your product data and begin monitoring.

During onboarding, you will receive an import template to **organize the product information** needed to set up your Price Intelligence program. This template provides a structured way to **share your SKU data** so matching and data collection can begin accurately.

This step establishes the connection between your product catalog and the retailers included in your program scope.

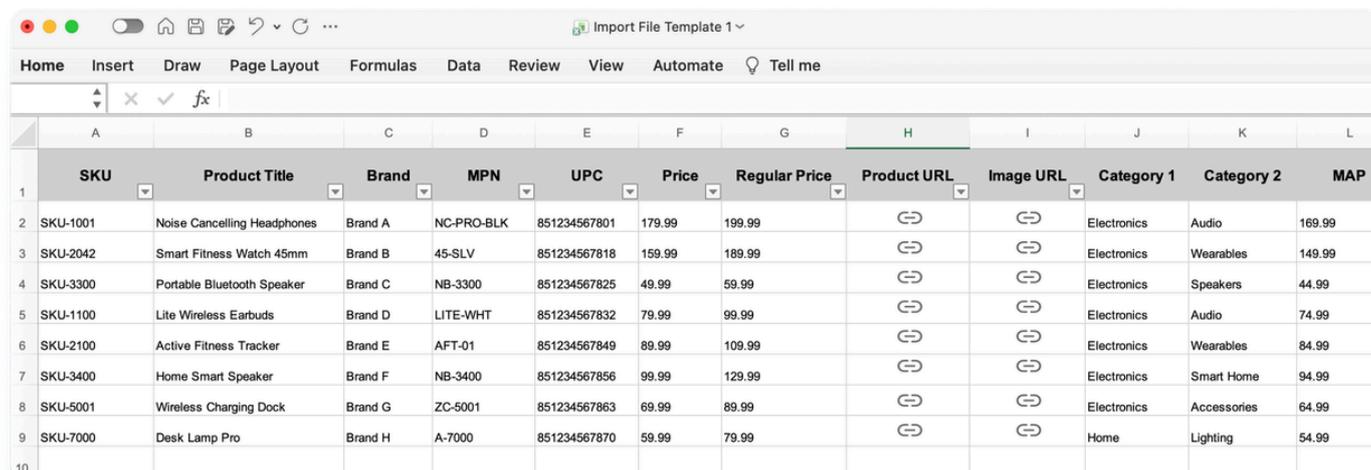
## Using the Import Template

- The import template is designed to capture the essential details needed to monitor pricing effectively, such as **product identifiers** and **reference attributes**. These details help ensure products are matched correctly across retailer listings.
- You do not need to complete every field before getting started. The goal is to provide a clear and accurate starting point that allows the system to begin tracking your products.

## Your Engagement Manager will work with you to:

- Review the file for completeness and accuracy.
- Validate required fields.
- Confirm that the data aligns with your monitoring goals.

This is a collaborative step. You are not expected to prepare the file on your own, and questions or adjustments are expected as part of the process.



The screenshot shows an Excel spreadsheet titled "Import File Template 1". The spreadsheet has a header row with columns labeled A through L. The data rows contain product information including SKU, Product Title, Brand, MPN, UPC, Price, Regular Price, Product URL, Image URL, Category 1, Category 2, and MAP.

	A	B	C	D	E	F	G	H	I	J	K	L
	SKU	Product Title	Brand	MPN	UPC	Price	Regular Price	Product URL	Image URL	Category 1	Category 2	MAP
1												
2	SKU-1001	Noise Cancelling Headphones	Brand A	NC-PRO-BLK	851234567801	179.99	199.99			Electronics	Audio	169.99
3	SKU-2042	Smart Fitness Watch 45mm	Brand B	45-SLV	851234567818	159.99	189.99			Electronics	Wearables	149.99
4	SKU-3300	Portable Bluetooth Speaker	Brand C	NB-3300	851234567825	49.99	59.99			Electronics	Speakers	44.99
5	SKU-1100	Lite Wireless Earbuds	Brand D	LITE-WHT	851234567832	79.99	99.99			Electronics	Audio	74.99
6	SKU-2100	Active Fitness Tracker	Brand E	AFT-01	851234567849	89.99	109.99			Electronics	Wearables	84.99
7	SKU-3400	Home Smart Speaker	Brand F	NB-3400	851234567856	99.99	129.99			Electronics	Smart Home	94.99
8	SKU-5001	Wireless Charging Dock	Brand G	ZC-5001	851234567863	69.99	89.99			Electronics	Accessories	64.99
9	SKU-7000	Desk Lamp Pro	Brand H	A-7000	851234567870	59.99	79.99			Home	Lighting	54.99
10												

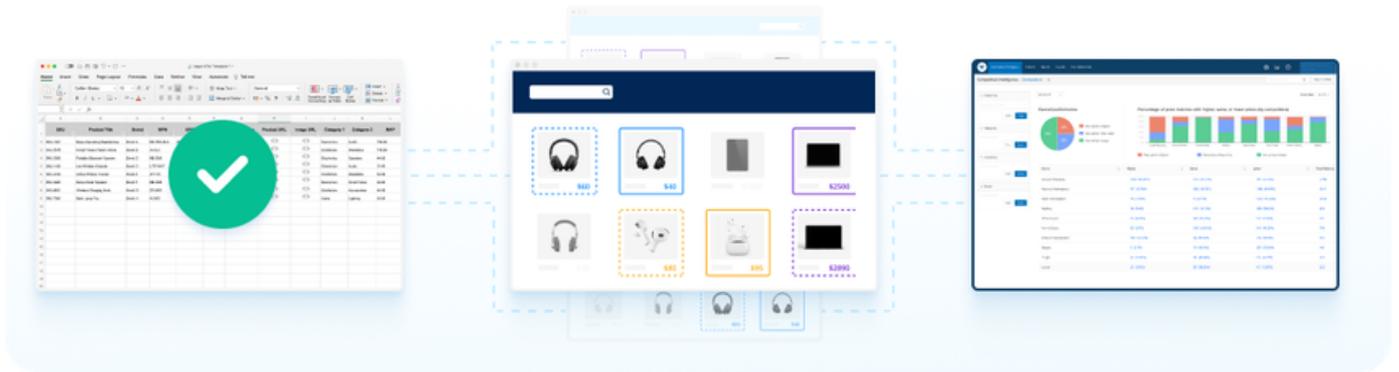
# Getting Started with Your Template

## After Your Data Is Uploaded

Once the template is validated and uploaded:

- Product matches are established across configured retailers.
- Pricing data begins appearing as crawls complete.
- Initial views may look sparse while coverage builds.

This is normal during the early stages of onboarding. As data continues to populate, **visibility improves** and **patterns become clearer**. Your Engagement Manager will confirm when your data is ready for review and help you understand what you are seeing as the program comes online.

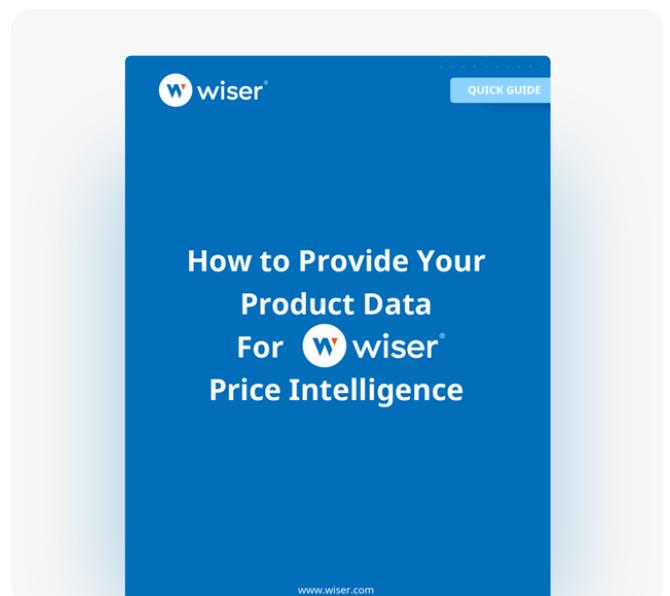


## Additional Guidance on Product Data

For teams that want a deeper understanding of how product data supports accurate matching, [additional guidance](#) is available outlining common product attributes, optional fields, and how variants or pack sizes are handled.

This reference is intended to provide context and does not replace the import template used during onboarding.

Your Engagement Manager can help determine which fields are most important for your specific setup.



# 03 Navigating the Dashboard

The dashboard interface includes a top navigation bar with 'Competitive Intelligence', 'Products', 'Reports', 'Insights', and 'Price Optimization'. The main content area is titled 'Competitive Intelligence - Competitors'. On the left, there are four filter sections: 'Product List', 'Categories', 'Competitors', and 'Brands', each with a 'Clear' and 'Apply/Select' button. A date selector shows '2024-12-04'. The 'Overall performance' section features a pie chart with a tooltip pointing to the 50% segment, labeled 'Your price is lower'. The legend indicates: 25% Your price is higher (red), 25% Your price is the same (blue), and 50% Your price is lower (green). To the right, a bar chart shows the 'Percentage of price matches with higher, same, or lower' for Google Shopping, Walmart Marketplace, and Sears Marketplace. Below these charts is a table with columns for 'Name', 'Higher', and 'Same'.

Name	Higher	Same
Google Shopping	1,702 (60.87%)	743 (26.57%)
Walmart Marketplace	371 (20.15%)	282 (15.32%)
Sears Marketplace	38 (3.59%)	6 (0.57%)
WalMart	78 (9.14%)	437 (51.23%)
Office Depot	91 (12.76%)	109 (15.29%)
Home Depot	65 (9.17%)	330 (46.54%)
Amazon Marketplace	186 (34.32%)	84 (15.50%)

# Navigating the Dashboard

## Understanding how Price Intelligence is organized.

Price Intelligence is organized around a small set of core areas that help you move **from high-level insight to SKU-level detail**. Each area answers a different type of question, and together they provide **a complete view of pricing activity across your products**.

You do not need to learn every part of the platform at once. Most users begin by exploring one or two areas that align with their role and expand from there as they become more comfortable with the data.

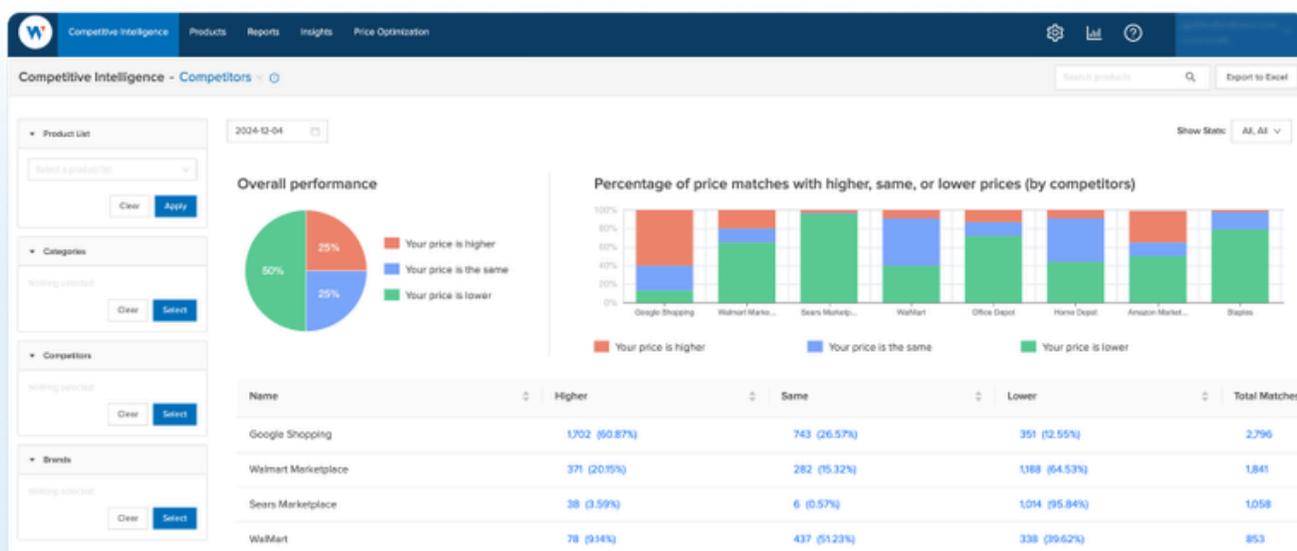
## Competitive Intelligence

**?** What this screen helps you answer: How am I priced relative to competitors overall?

The Competitive Intelligence area provides a **high-level view of how your prices compare across competitors, categories, or brands**. Visual summaries help you quickly understand where your pricing is higher, lower, or aligned with the market. This is often a starting point for new users. From here, you can:

- Identify areas where pricing differences stand out.
- Narrow focus using filters such as category, brand, or competitor.
- Move from summary views into more detailed SKU analysis.

This screen is designed to help you spot patterns and decide where deeper review is needed, not to drive immediate action.



# Navigating the Dashboard

## Products

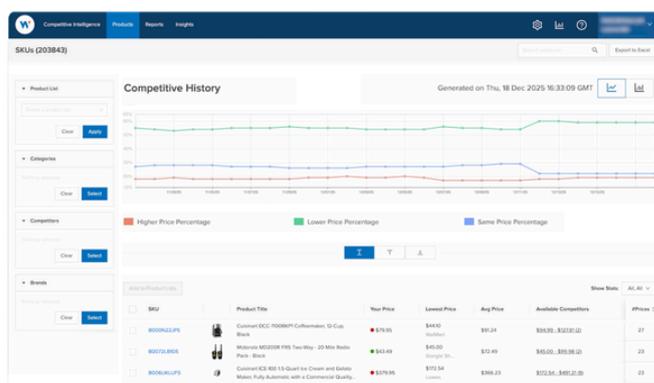
**? What this screen helps you answer:** What's happening at the SKU level?

The Products area shifts the focus from overall patterns to individual SKUs. Here, you can review pricing comparisons, trends over time, and competitor behavior for specific products.

Common uses include:

- Reviewing price history for key SKUs.
- Comparing your price against lowest or average competitor prices.
- Identifying products with frequent price movement.

Filters and product lists are often used alongside this view to keep analysis focused and relevant to your role.



## SKU Details

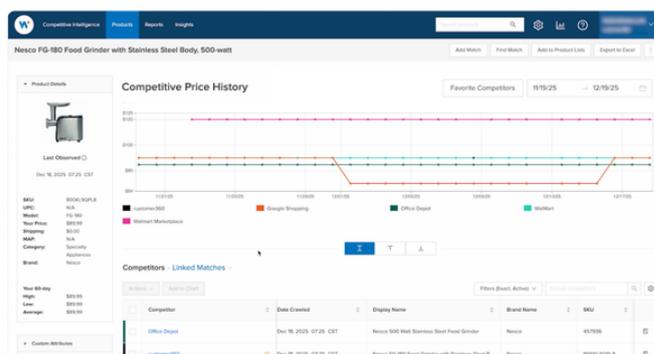
**? What this screen helps you answer:** Is this price accurate, and what changed?

The SKU Details view provides the most granular level of information for a single product. It shows observed prices, historical trends, availability, and competitor listings in one place.

This is the best area to:

- Validate pricing differences.
- Review availability and crawl timing.
- Confirm when and where a price was observed.

When something looks unexpected, this view provides the context needed before drawing conclusions or taking action.



# Navigating the Dashboard

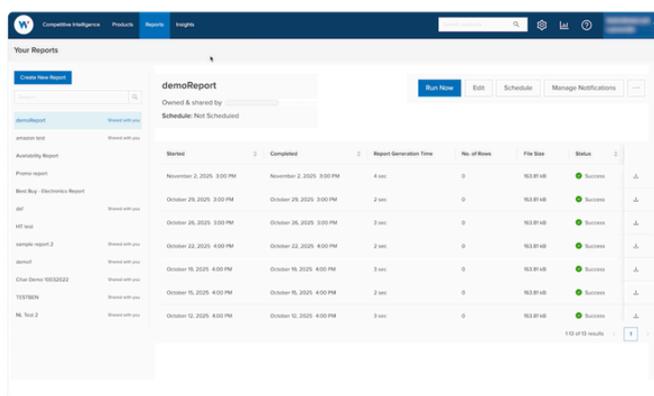
## Reports

**? What this screen helps you answer:** How do I analyze or share pricing data more broadly?

Reports allow you to analyze pricing data across groups of products, retailers, or time periods. They are commonly used to:

- Track pricing trends over time.
- Share insights with internal teams.
- Support pricing reviews and planning.

Some reports are created directly in the platform, while others may be delivered through SFTP. Your Engagement Manager can help guide which approach best supports your workflow.



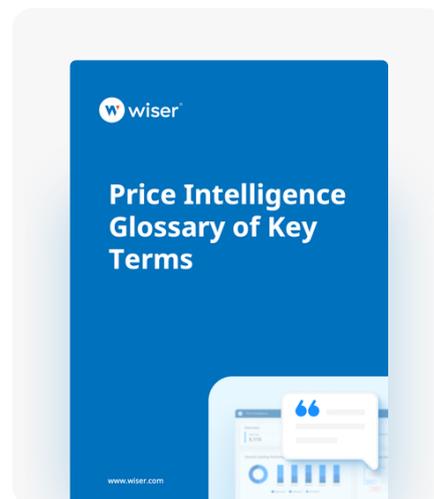
Started	Completed	Report Generation Time	No. of Rows	File Size	Status
November 2, 2025, 3:00 PM	November 2, 2025, 3:00 PM	4 sec	0	103.81 KB	Success
October 29, 2025, 3:00 PM	October 29, 2025, 3:00 PM	2 sec	0	103.81 KB	Success
October 26, 2025, 3:00 PM	October 26, 2025, 3:00 PM	3 sec	0	103.81 KB	Success
October 22, 2025, 4:00 PM	October 22, 2025, 4:00 PM	2 sec	0	103.81 KB	Success
October 16, 2025, 4:00 PM	October 16, 2025, 4:00 PM	3 sec	0	103.81 KB	Success
October 15, 2025, 4:00 PM	October 15, 2025, 4:00 PM	2 sec	0	103.81 KB	Success
October 12, 2025, 4:00 PM	October 12, 2025, 4:00 PM	3 sec	0	103.81 KB	Success

## Getting Comfortable with the Interface

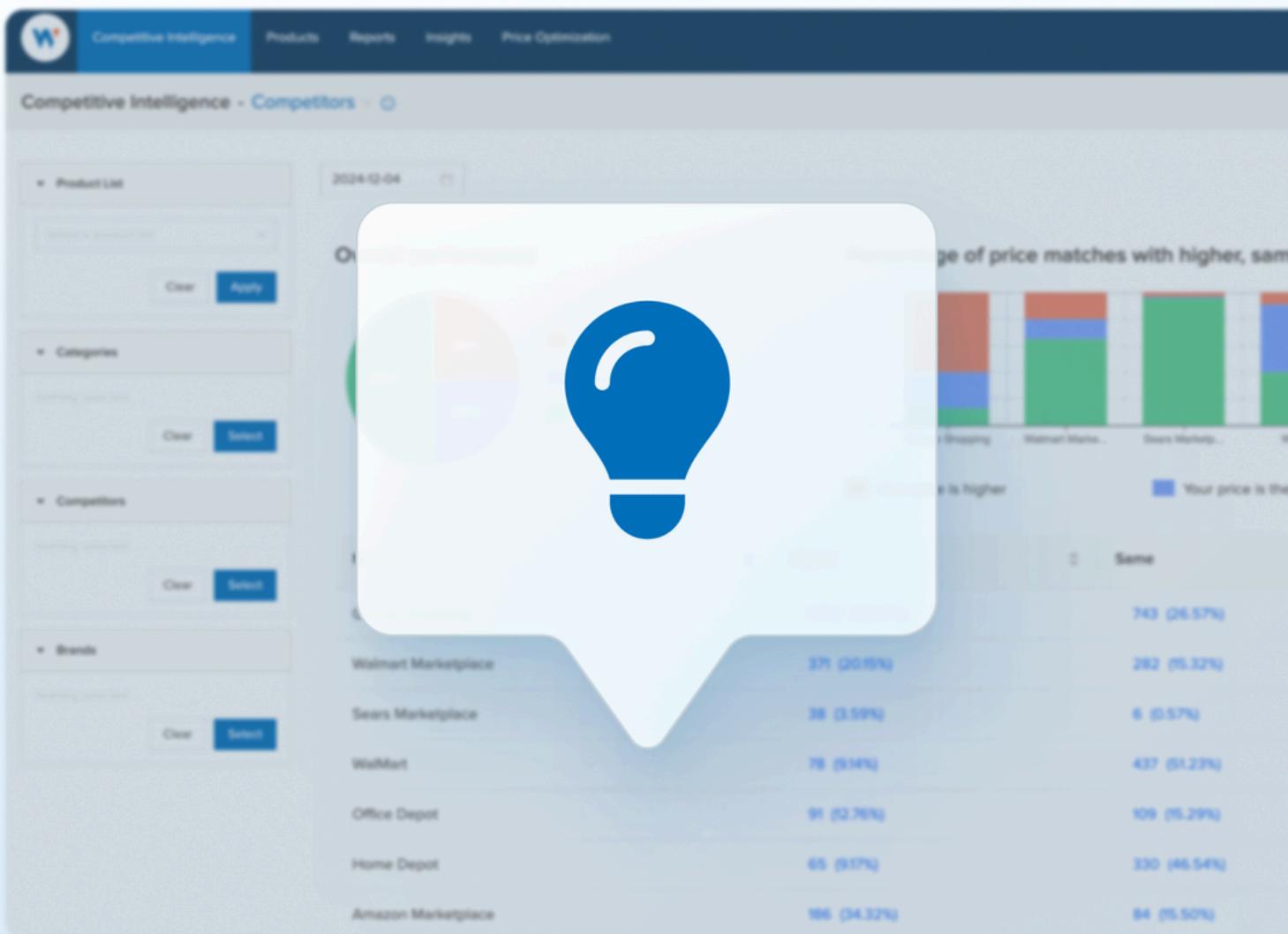
It's normal for new users to spend time getting familiar with where things live and how different areas of the platform connect. Start with one or two areas that align with your role and build from there. For step-by-step workflows and deeper feature guidance:

- Use the PI Checklist to support hands-on tasks.
- Reference the PI Glossary for definitions and field-level detail.

These resources complement this guide and are designed to support ongoing adoption as you gain confidence.



# 04 Considerations Going Forward



# Considerations Going Forward

## What to keep in mind as you begin using Price Intelligence

As you begin using Price Intelligence, remember that you do not need to learn everything at once. Start by exploring the platform, getting comfortable with the data, and building familiarity with how pricing information is presented.

A few practices can help you get the most value early on:



### Check data context before reacting

When reviewing pricing differences, look at supporting details such as crawl date and availability. Pricing reflects what was observed during the most recent crawl, and timing or stock status can explain many apparent discrepancies.



### Start focused

Begin with a small set of products, categories, or competitors that matter most to your role. Narrow views make it easier to spot meaningful changes and build confidence in the data.



### Expect patterns, not perfection

Early data may look incomplete as coverage builds and history accumulates. Over time, repeated crawls create clearer trends and more reliable comparisons.



### Use filters and views intentionally

Filters and saved views help tailor the platform to your needs. Customizing views early allows you to return to layouts that support how you work day to day.



### Lean on your Engagement Manager

If something looks unclear or unexpected, your Engagement Manager can help validate what you're seeing and confirm whether adjustments are needed.

By starting with these practices, you'll quickly develop a rhythm with the platform and gain confidence in how Price Intelligence supports pricing decisions over time.

# Conclusion and What Comes Next

Price Intelligence is designed to support informed pricing decisions from the moment your program is live. With your products configured, data collection underway, and a basic understanding of how the platform is organized, you are ready to begin using the data with confidence.

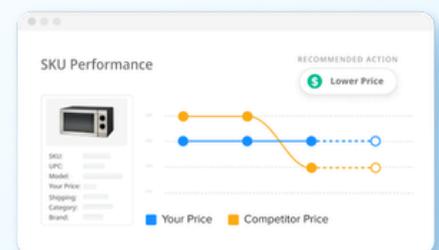
As you continue, additional resources are available to support deeper adoption:

- The Price Intelligence Checklist provides step-by-step guidance for common workflows and day-to-day tasks.
- The Price Intelligence Glossary offers definitions and explanations for fields, metrics, and terminology you may encounter.
- Additional reporting and strategy resources can support more advanced analysis as your needs evolve.

Your Engagement Manager will continue to support you as you refine your views, explore new use cases, and build familiarity with the platform.

By spending time in the product and applying the guidance in this onboarding guide, you will build a strong foundation for using Price Intelligence as part of your ongoing pricing strategy.

View Settings	Product	Retailer 1	Retailer 2	Retailer 3
View name: [dropdown] Country: [dropdown] Currency: [dropdown]	Microwave SKU: [SKU] Model: [Model] Year Price: [Year Price] Shipping Category: [Shipping Category] Brand: [Brand]	\$89.99	\$63.99	\$62.48
	Kettle SKU: [SKU] Model: [Model] Year Price: [Year Price] Shipping Category: [Shipping Category] Brand: [Brand]	\$50.99	\$22.95	\$15.95
	Vacuum SKU: [SKU] Model: [Model] Year Price: [Year Price] Shipping Category: [Shipping Category] Brand: [Brand]	\$132.55	\$124.05	\$123.95
	Fridge SKU: [SKU] Model: [Model] Year Price: [Year Price] Shipping Category: [Shipping Category] Brand: [Brand]	\$230.45	\$220.95	\$215.95



Name	Event	Events within 24h	Product List	Status
New Price Alert	Price Change	498	Home Furnishings	Active
Product Sync Successful	2,352 Products Updated Latest update: 5min	246	Electronics	Inactive
Black Friday	Price decrease	583	Black Friday Doorbusters	Active

Report name	Delivery time	File size	Delivery status
Black Friday list	Delivered: 07:30 AM	42.10 MB	On time In Full
Daily All Products	Delivered: 08:54 AM	50.76 MB	On time In Full
Appliance	Expected: 09:30 AM	63.12 MB	In progress
Electronics	Expected: 04:30 PM	53.78 MB	Not started

Competitiveness	Retailer	In Stock	Price
Lower Price	Retailer 1	✓	\$248.99
Same Price	Retailer 2	✓	\$248.95
Higher Price	Retailer 3	✗	\$245.95
Average	Retailer 4	✓	\$69.99



# Thank You

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