

Oracle® Retail Item Planning Configured for COE

User Guide for the RPAS Fusion Client

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Oracle Retail Item Planning Configured for COE User Guide for the RPAS Fusion Client, Release 14.0.2

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Preface

This guide describes the Item Planning Configured for COE user interface. It provides step-by-step instructions to complete most tasks that can be performed through the user interface.

Audience

This User Guide is for users and administrators of Oracle Retail Item Planning Configured for COE. This includes merchandisers, buyers, business analysts, and administrative personnel.

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For more information, see the following documents in the Item Planning Configured for COE Release 14.0.2 documentation set:

- *Oracle Retail Item Planning Configured for COE Release Notes*
- *Oracle Retail Item Planning Configured for COE Installation Guide*
- *Oracle Retail Item Planning Operations Guide*
- *Oracle Retail Item Planning Configured for COE User Guide for the RPAS Classic Client*
- Oracle Retail Item Planning documentation set

For more information about the Fashion Planning Bundle applications see the following documentation sets:

- Oracle Retail Item Planning documentation
- Oracle Retail Clearance Optimization Engine documentation
- Oracle Retail Assortment Planning documentation
- Oracle Retail Merchandise Financial Planning documentation
- Oracle Retail Size Profile Optimization documentation

For more information about the RPAS Fusion Client, see the following documents in the Oracle Retail Predictive Application Server Release 14.0.2 documentation set.

For more information about RPAS and the ODI Enabled Integration, see the following documentation sets:

- Oracle Retail ODI Enabled Integration documentation
- Oracle Data Integrator documentation
- Oracle Retail Predictive Application Server documentation

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- Screen shots of each step you take

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Oracle Retail Documentation on the Oracle Technology Network

Documentation is packaged with each Oracle Retail product release. Oracle Retail product documentation is also available on the following Web site:

<http://www.oracle.com/technetwork/documentation/oracle-retail-100266.html>

(Data Model documents are not available through Oracle Technology Network. These documents are packaged with released code, or you can obtain them through My Oracle Support.)

Documentation should be available on this Web site within a month after a product release.

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

Introduction

Oracle Retail Item Planning Configured for COE (IP COE) facilitates the translation of merchandise financial plans into execution level, item driven strategies to be followed throughout the life of a product. It represents the bottom-up planning process, complementing and working in concert with the top-down financial plans. By providing weekly visibility into item performance and financial targets, the item planning process increases the likelihood that merchandising strategies are successfully executed within the financial plan parameters.

Item Planning Process

Item Planning is part of an overall planning process that involves planning at multiple levels of the product hierarchy. The planning process can be thought of as a continual process where each step enhances the following, and prior performance affects plans for future performance. Planning takes input from multiple parties, and communication enhances the process to help drive a financial road map for success. Multiple versions of the plan are created to benchmark success as well as provide insight to opportunities and risk for the in-season period.

Item Planning Benefits

Item Planning provides the following benefits:

- Quantified financial plans
- Unified financial and item strategies
- A proactive approach towards business trends as opposed to reactive
- More efficient use of inventory
- Reduced markdowns
- Increased profits
- Increased return on investment

Item Planning Features

Item Planning provides the following features:

- Item/channel/week planning
- Multichannel support
- Unit plans converted into values

- Reconciliation to financial targets
- Preseason and in-season workflow process support
- Item demand forecast
- Promotional sales planning
- Like item functionality
- Placeholder functionality
- View-to-weekly marketing strategy for each item
- Self approval process
- Robust planning and assessment measure set

Preseason Planning

Prior to the beginning of the style/color's lifecycle, the preseason planning takes place. The process begins with the planner reviewing external and internal data, such as MFP targets, and input from their merchant partners. The planner then maps history where needed for their items that are new, or perhaps have been included in a hierarchy reclassification, and for which the planner would like to specify which history should be utilized by specified items.

Best practices show that planning the reductions measures first, and within that, planning the sales units first, allows for a logical and smooth item planning process. The sales units set the tone by which the remainder of the planned measures are driven.

On the Item Plan Parameters view, the planner selects parameters that initiate an item plan.

First, the planner defines sales and price based parameters such as Start Sell Week and Out of Stock Week, along with the number of stores to be planned and the Rate of Sale as well as Regular Price and Regular Cost. Then the planner selects the baseline curve to spread the sales units over the regular and promotional lifecycle of the item plan.

Next, the planner plans markdowns, first promotional markdowns by assigning style colors to pre defined promotions. Then the planner selects the clearance cadence to define their clearance sell off.

After the total sales units and values have been planned, the planner then defines the receipt parameters such as initial allocation percentage, presentation minimum, receipt frequency, and safety stock.

After receipts have been flowed, the planner can then review the item plan in total.

The planner then reconciles back to the MFP plans; if the plan is reconciled, the planner self-approves the plan.

If the plan does not reconcile back to the MFP plans, the planner returns to the plan's unit sales and reduction planning and adjusts areas of the plan that are required to select reconciliation back to the MFP plans.

Because this is an iterative process, clear communication to the planner's superior is integral to the efficiency and effectiveness of this process.

Plan Versions

The following are versions of the plan:

- Original Plan (Op): The benchmark against which to measure in-season performance.
- Current Plan (Cp): The in-season-updated plan to reflect actual and projected performance.
- Working Plan (Wp): The item planner's plan version to use while creating the Cp.

In-Season Management

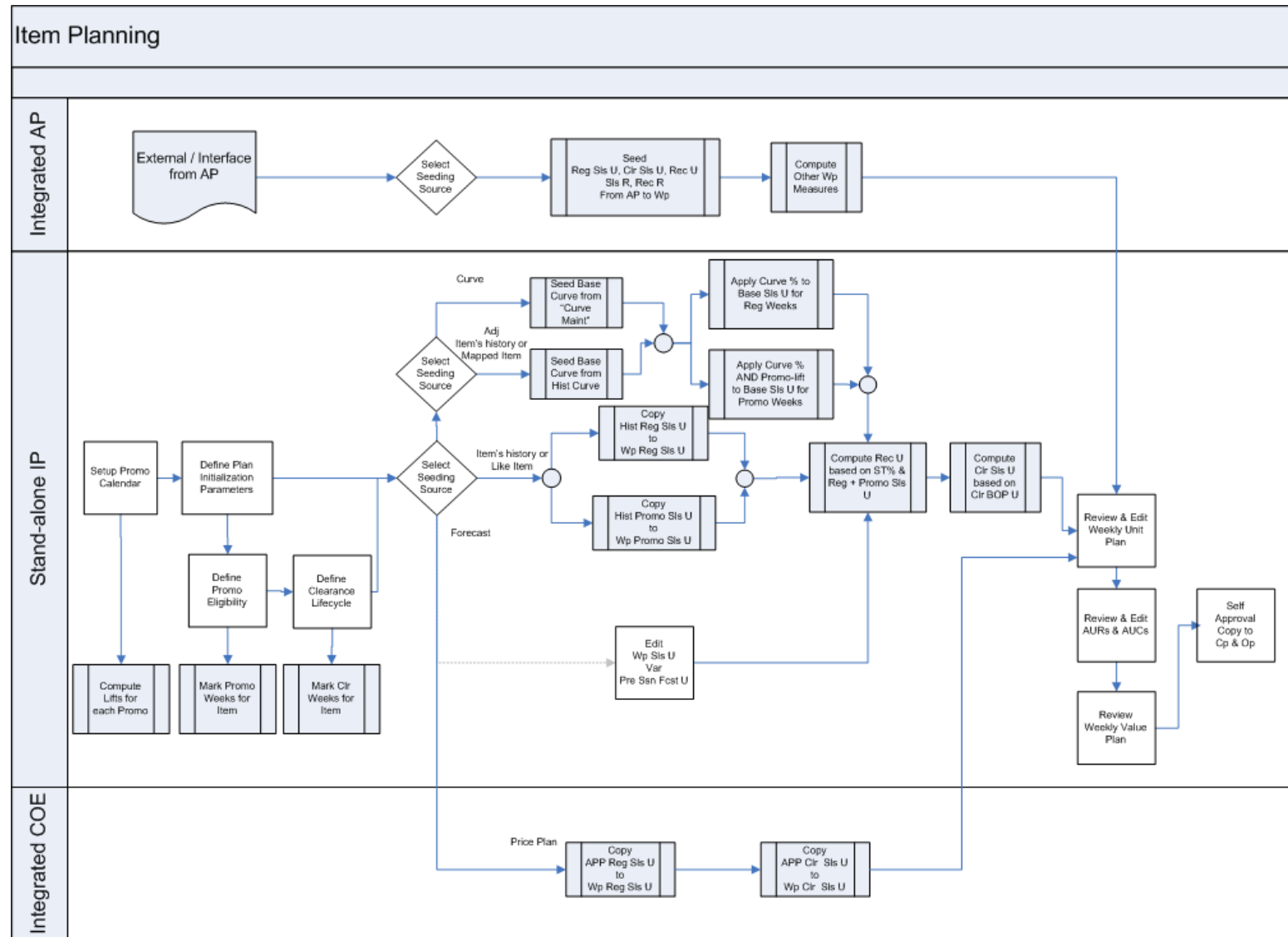
Once the plan period process has begun, in-season planning begins. The planner now uses the plan created in the preseason planning process as the benchmark for successful in-season planning. To begin the in-season planning process, the planner first manually reviews the factors that affect sales.

The planner begins by reviewing the Dashboard view, which highlights the style/colors that are performing differently from the Original Plan. The style/colors that have the largest variance from the plan are likely to need the most attention. By using the exception measures in the Dashboard, the planner can quickly identify the style/colors that need replanning.

The planner determines whether these events will still be going, or whether they will behave the way they were originally planned. If these special trends will not persist, the planner determines the differences and how they will affect the performance of the item. After this process is complete, the planner updates unit sales if needed. As in the preseason planning process, in which planning sales first is the best way to approach a new plan, sales is the first measure that should be updated for in-season planning. All remaining measures are affected by sales.

Next, the planner adjusts future receipts as needed. The planner also reviews how the new sales and receipts affect the resulting inventory. Then the exit strategy is updated. Once the exit strategy is updated, the planner reviews the result in their plans. Then the planner reconciles to MFP, and if the plans are reconciled, the planner self-approves the plan to the current plan. If the plan is not reconciled, the planner goes back to unit sales and performs adjustments as necessary. This process continues until the item plan is reconciled to the MFP plan.

Figure 1-1 Item Planning Process Diagram



Week Mapping

The Week Mapping task is used only by the administrator to adjust historical sales to accommodate calendar shifts. The adjusted sales then appear in the [Develop and Approve Item Plans](#) task for reference while planning. This functionality is helpful when events shift from one week to another, or when there are different numbers of weeks from one calendar year to another.

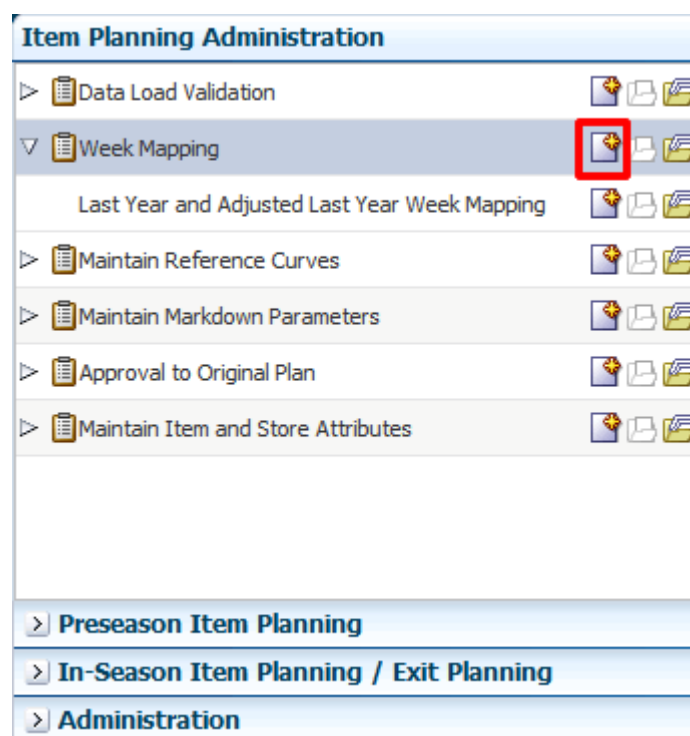
The Week Mapping task contains one step: [Last Year and Adjusted Last Year Week Mapping Step](#).

Building the Week Mapping Workbook

To build a Week Mapping workbook:

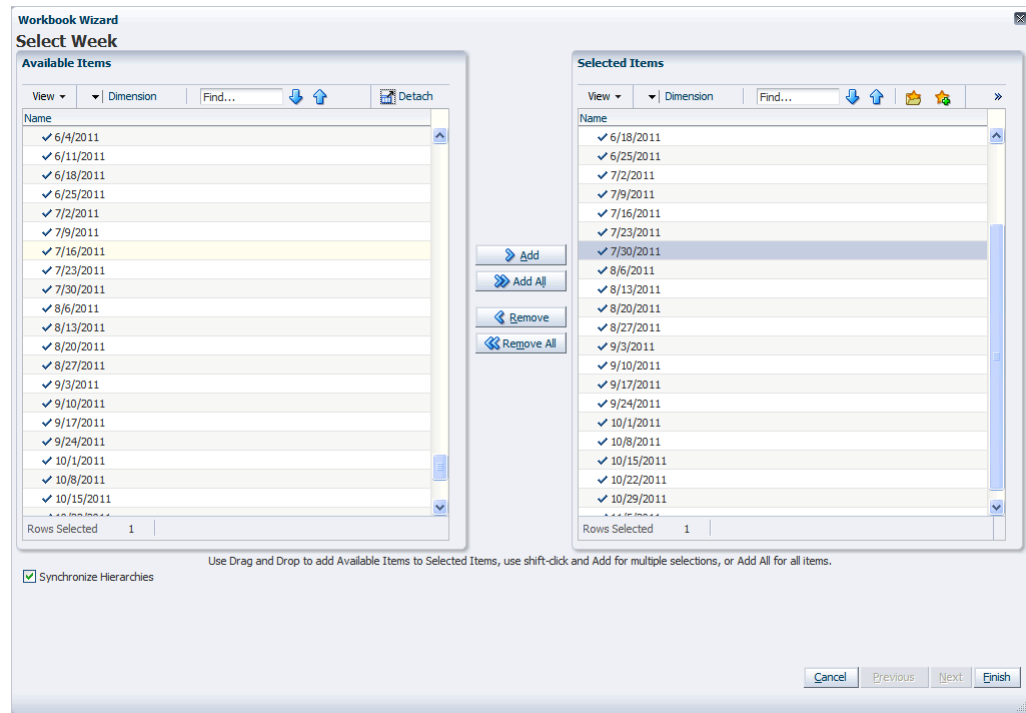
1. Click the **New Workbook** icon in the Week Mapping task.

Figure 2-1 Week Mapping Task



- The Week Mapping Workbook Wizard appears at the Select Week step. Select the weeks you want to map and click **Finish**.

Figure 2–2 Week Mapping Workbook Wizard: Select Week



The workbook is built.

Last Year and Adjusted Last Year Week Mapping Step

This step contains a single view called Set LY Mappings. Within this view, you can set the mappings for last year and adjusted last year.

The week indicated in the Adj Ly Lag measure is where the performance data is retrieved when you look at Ly data.

Figure 2–3 Set LY Mappings View

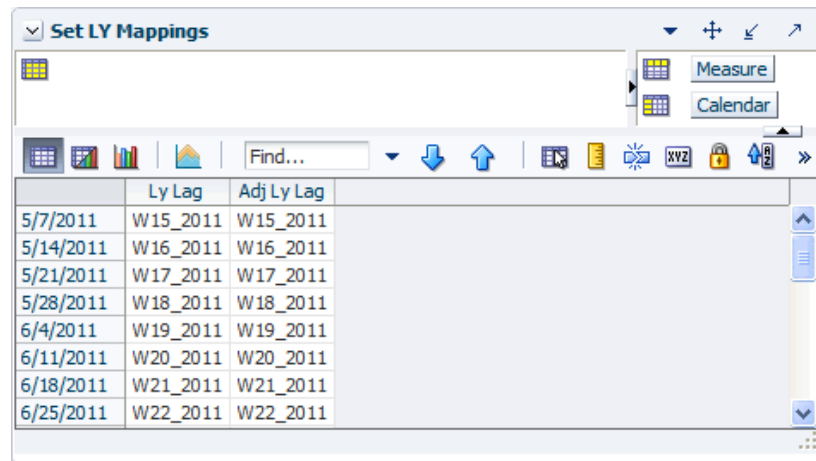


Table 2–1 Set LY Mappings View Measures

Measure	Description
Ly Lag	Identifies the week used for mapping as last year.
Adj Ly Lag	Identifies the week used for mapping as adjusted last year.

Maintain Reference Curves

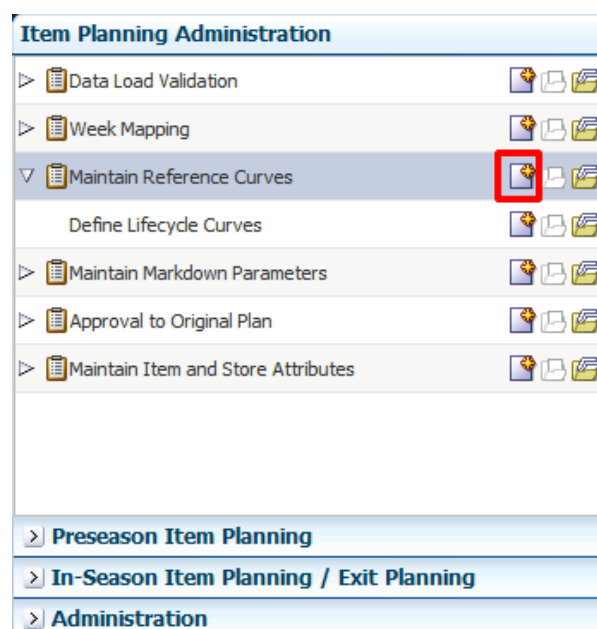
The Maintain Reference Curves task is used to create reference curves, which are used to spread unit sales to week in the [Develop and Approve Item Plans](#) task. Reference curves are based on percent-to-total sales, and they shrink or stretch to fit the defined regular or promotional sales period. In Item Planning, reference curves are used only for regular and promotional sales periods, unlike Assortment Planning which uses them for the entire lifecycle of an item. The reference curves created in this task are used in the [Develop and Approve Item Plans](#) activity.

Building the Maintain Reference Curves Workbook

To build a Maintain Reference Curves workbook, perform the following steps:

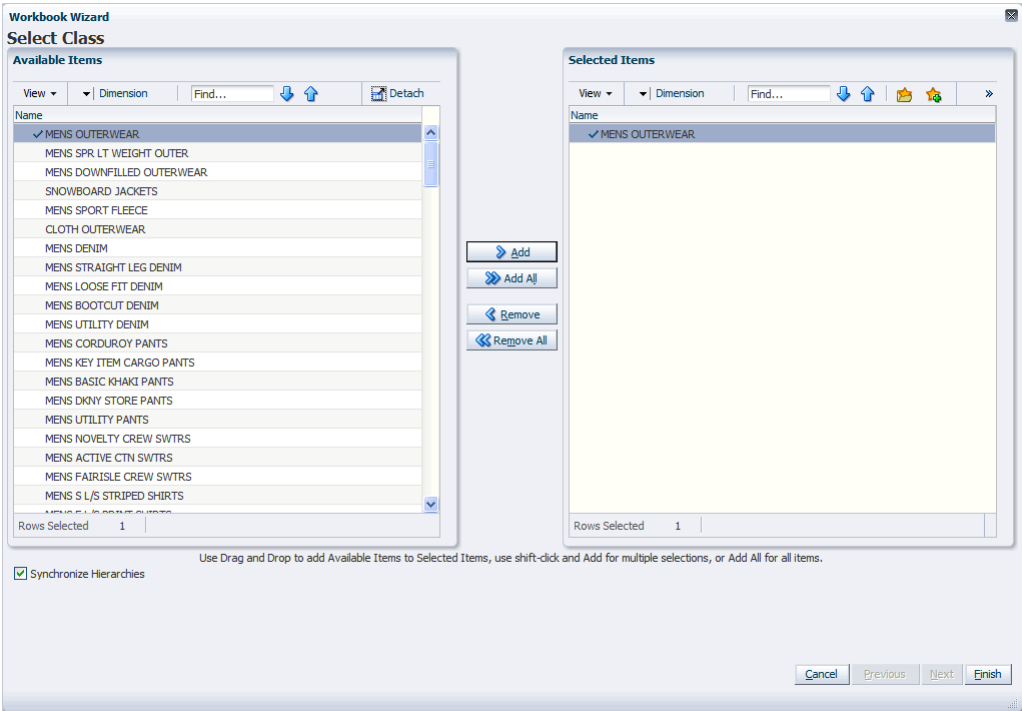
1. Click the **New Workbook** icon in the Maintain Reference Curves task.

Figure 3–1 *Maintain Reference Curves Task*



2. The Reference Curves Wizard appears at the Select Class step. Select the products you want to create curves for and click **Finish**.

Figure 3–2 Reference Curves Wizard: Select Class

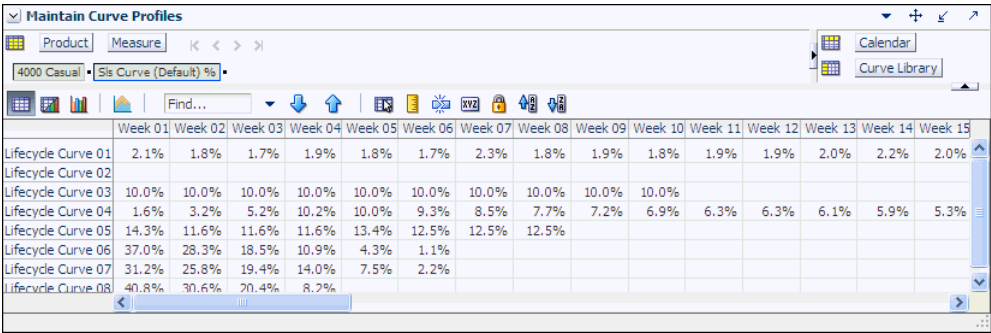


The Maintain Reference Curves workbook is built and opens at the [Maintain Curve Profiles View](#).

Maintain Curve Profiles View

The Define Lifecycle Curves step contains a single view, Maintain Curve Profiles. Use this view to create sales curves to be used in the [Develop and Approve Item Plans](#) task. These curve profiles are based on a percent-to-total sales. Regardless of weeks in the curve, the curves can shrink or stretch to fit the defined regular and promotional sales period.

Figure 3–3 Maintain Curve Profiles View



- Perform the following steps to create curve profiles:
- 1. Ensure that all[Calendar] is shown in the Calendar dimension.
 - 2. In the intersection of the Sales Curve Label measure and the all[Calendar] level, enter the label of the curve profile. This label is displayed in the Preseason Item Planning activity.

- Starting in Week 01, enter the percent-to-total sales percentage in the weeks of the curve profile. The number of defined weeks is up to you.

Note: You must start the curve in Week 01 for the curve to be able to shrink or stretch to fit the defined regular and promotional sales period.

- Click **Calculate**. The all[Calendar] percentage is calculated based on the percentages in the defined weeks.
- When finished, save and commit the workbook.

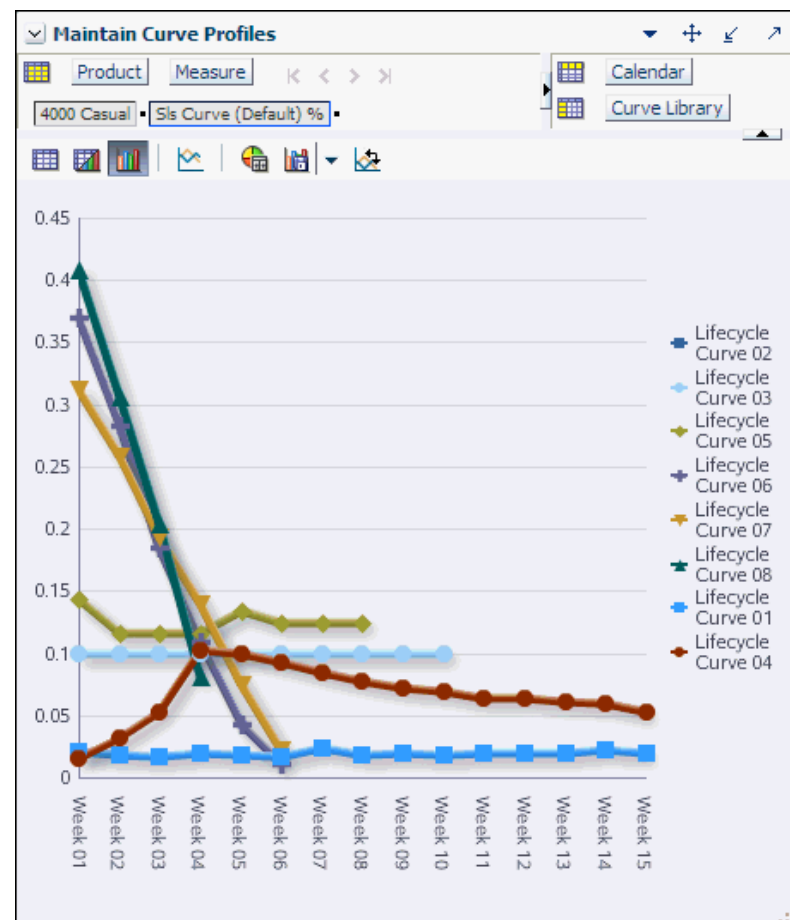
Table 3–1 lists the measures available on this view.

Table 3–1 Maintain Curve Profiles View Measures

Measure	Description
Sales Curve Label	Enter a label for the lifecycle curve. This label is displayed in the Develop and Approve Item Plans task.
Sales Curve %	Enter percent-to-total sales percentage in the weeks of the curve.

Use the graph view to see how the curves look over the sales period ([Figure 3–4](#)).

Figure 3–4 Maintain Curve Profiles Graph View



Maintain Markdown Parameters

The Maintain Markdown Parameters task is used to define the promotions and clearance cadences for corporate, store-wide, or planner-specific promotions. After these are created, they are assigned to style-colors in the [Develop and Approve Item Plans](#) task.

This task contains the following steps:

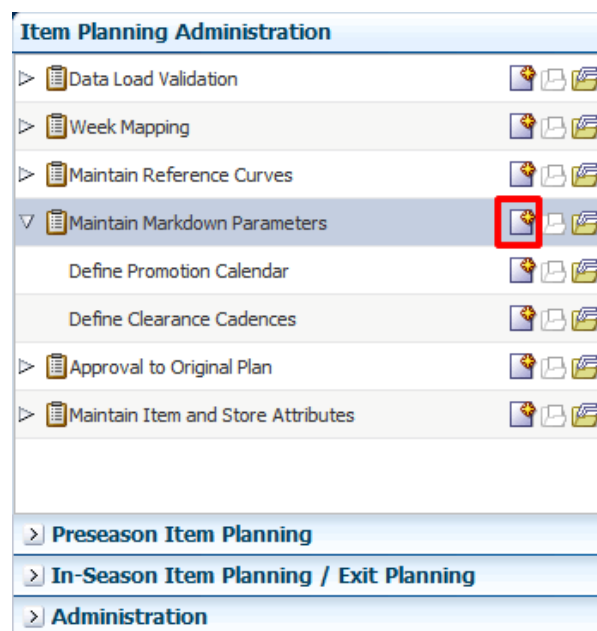
- [Define Promotion Calendar Step](#)
- [Define Clearance Cadences Step](#)

Building the Maintain Markdown Parameters Workbook

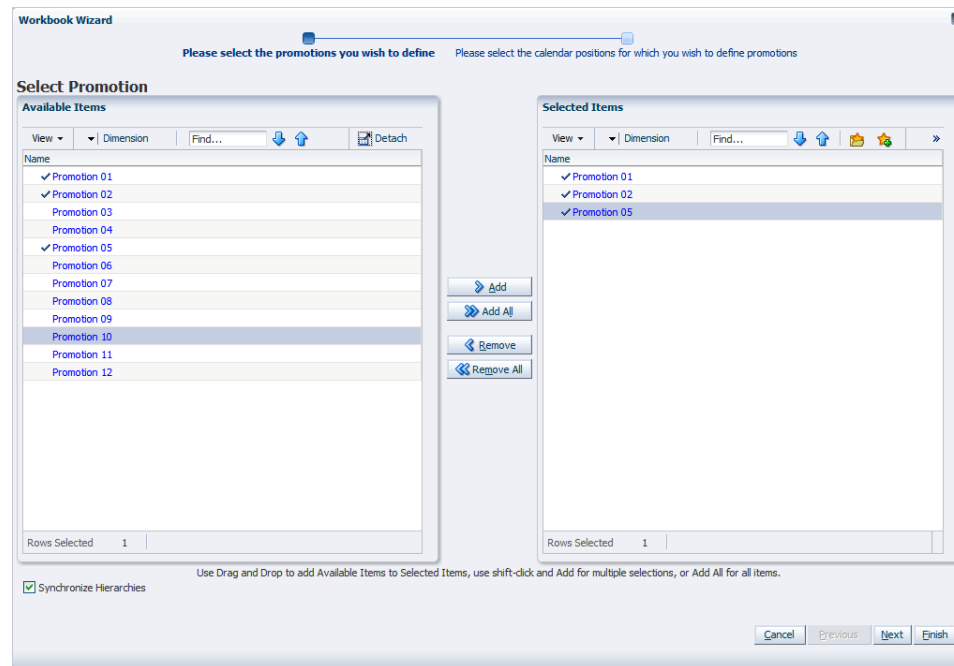
To build a Markdown Parameters workbook, perform the following steps:

1. Click the **New Workbook** icon in the Maintain Markdown Parameters task.

Figure 4–1 New Workbook Dialog Box

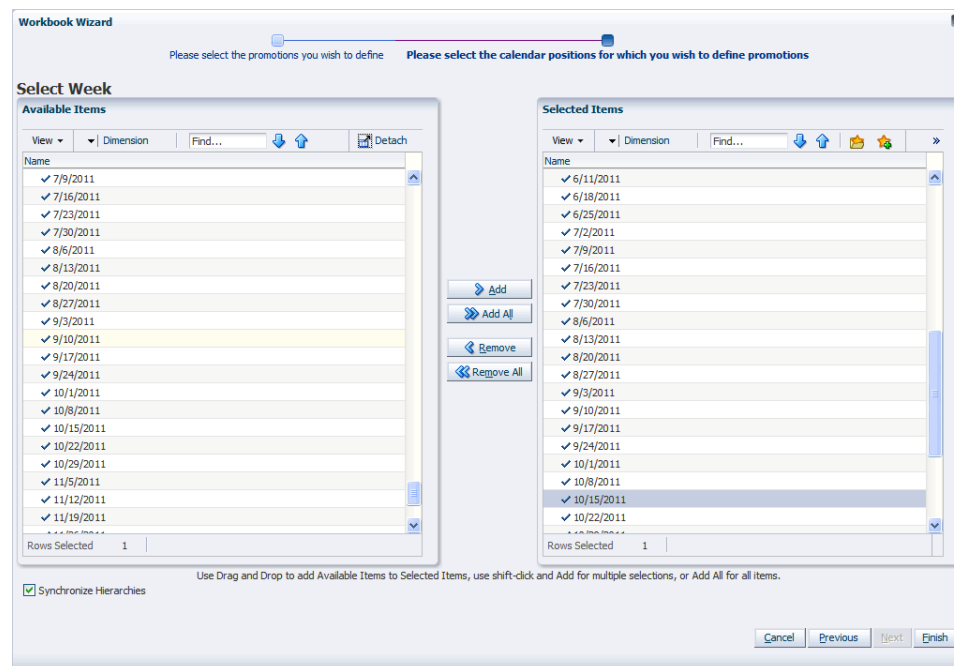


2. The Markdown Parameters Wizard appears at the Select Promotions step. If you have not previously set up promotions, only generic promotions are available for selection. Select the number of promotions you want to create and click **Next**.

Figure 4–2 Markdown Parameters Wizard: Select Promotions

If you have created promotions previously, those promotions are available for selection.

3. The Calendar step appears. Select the time periods you want and click **Finish**.

Figure 4–3 Markdown Parameters Wizard: Select Calendar

The Markdown Parameters workbook is built.

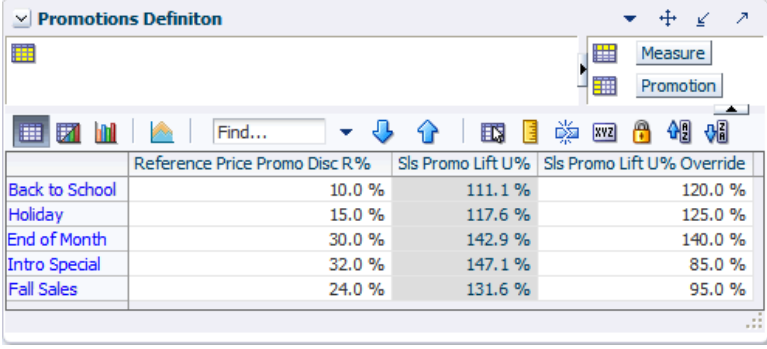
Define Promotion Calendar Step

The Promotions Definition step contains two views: [Promotions Definition View](#) and [Promotions Weeks View](#). Use these two views to discount rate, lift, lift override, and lifecycle of promotions.

Promotions Definition View

Use this view to define the lift for the entire promotion. Keep in mind that you are not defining the lift for specific weeks of the promotions but for the entire promotion in general.

Figure 4–4 Promotions Definition View



	Reference Price Promo Disc R%	Sls Promo Lift U%	Sls Promo Lift U% Override
Back to School	10.0 %	111.1 %	120.0 %
Holiday	15.0 %	117.6 %	125.0 %
End of Month	30.0 %	142.9 %	140.0 %
Intro Special	32.0 %	147.1 %	85.0 %
Fall Sales	24.0 %	131.6 %	95.0 %

Perform the following steps to define the promotional lifts:

1. (Optional): Use DPM to change the promotion label to one that represents the event.
2. In the Reference Price Promo Disc R% measure, enter the discount percentage of the promotion.
3. Click **Calculate**. This automatically calculates the Promo Lift U% measure for the promotion. This is the percent of increased sales that must occur to overcome the decrease in price to sell the same dollar amount.
4. (Optional): To use a different promotional lift than the one calculated in Sls Promo Lift U%, enter it in the Sls Promo Lift U% Override measure.

Note: If you want the override lift to be 20%, enter 120.

If an override lift exists for a promotion, that lift is used in the [Develop and Approve Item Plans](#) task. Otherwise, the lift created by the Promo Lift U% measure is used. The lift used will be the same for every week in the promotion.

[Table 4–1](#) lists the measures available on this view.

Table 4–1 Promotions Definition View Measures

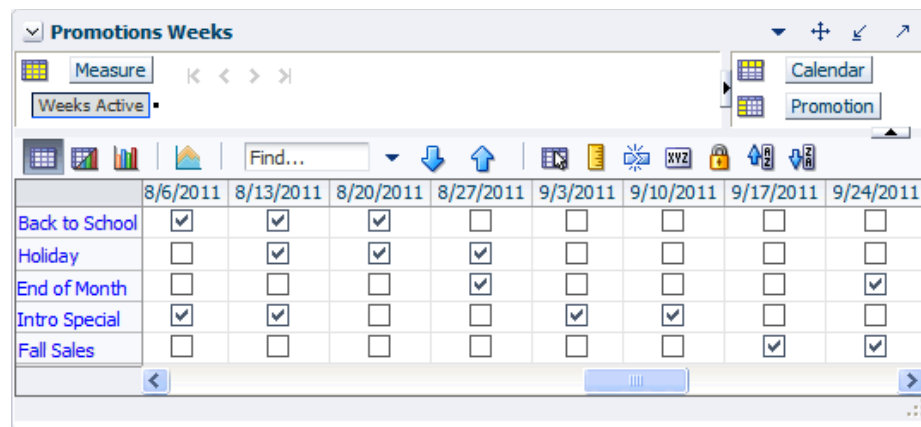
Measure	Description
Reference Price Promo Disc R%	The discount percentage of the promotion.

Table 4–1 (Cont.) Promotions Definition View Measures

Measure	Description
Sls Promo Lift U%	The promotional lift. This is the percent of increased sales that must occur to overcome the decrease in price to sell the same dollar amount. The lift in this measure is automatically calculated from the Reference Price Promo Disc R% measure when the user clicks Calculate .
Sls Promo Lift U% Override	Use this measure to manually enter the promotional lift. The lift entered in this measure overrides the lift calculated in the Sls Promo Lift U% measure.

Promotions Weeks View

Use this view to define the promotional period for each promotion. The promotional periods will use the lift or lift override defined in the [Promotions Definition View](#).

Figure 4–5 Promotions Weeks View

In this view, select the weeks that make up each promotion. This view contains one measure, as described in [Table 4–2](#):

Table 4–2 Promotions Weeks View Measure

Measure	Description
Weeks Active	Use this measure to select the weeks of the promotion. Promotions in Item Planning are applied for an entire week. You can also define promotions that are active in non-consecutive weeks. If you have a promotion that is active on the first week of every month, you need to set up only one promotion that is active at each of the selected weeks.

Once you have defined the promotional period and lift for each promotion, continue to the [Define Clearance Cadences Step](#).

Define Clearance Cadences Step

The Define Clearance Cadences step contains one view: Markdown Cadence.

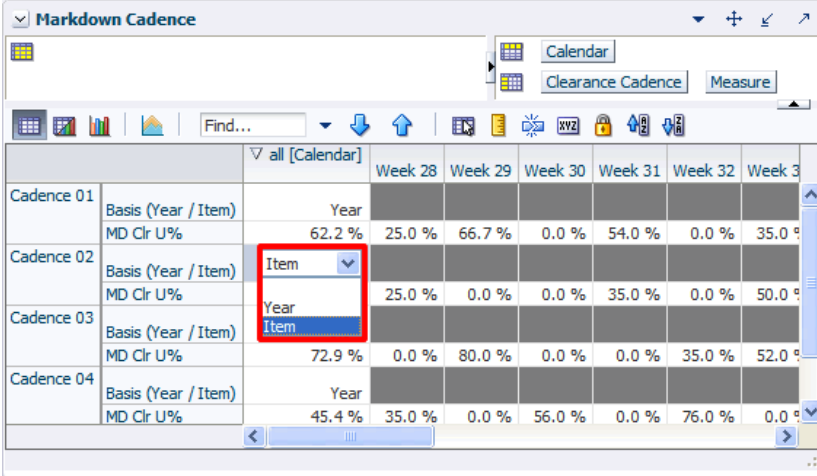
Markdown Cadence View

Use the Markdown Cadence view to define clearance cadences. Clearance Cadences are used when style-colors are ready to be put on hard clearance markdown. These cadences will be available for selection in the Dashboard view of the In-Season Item Planning / Exit Planning activity.

Perform the following steps to define clearance cadences:

1. Ensure that all[Calendar] is shown in the Calendar hierarchy.
2. In the intersection of the Basis (Year/Item) measure and the all[Calendar] dimension, select what the cadence is based on. There are two options:
 - **Year:** Based on the absolute year. If the cadence is defined as starting on Week 36/10, it starts on Week 36 of the fiscal year.
 - **Item:** Based on the lifecycle of the item. If the cadence is defined as starting on Week 36/10, it starts on the first week of the item lifecycle.

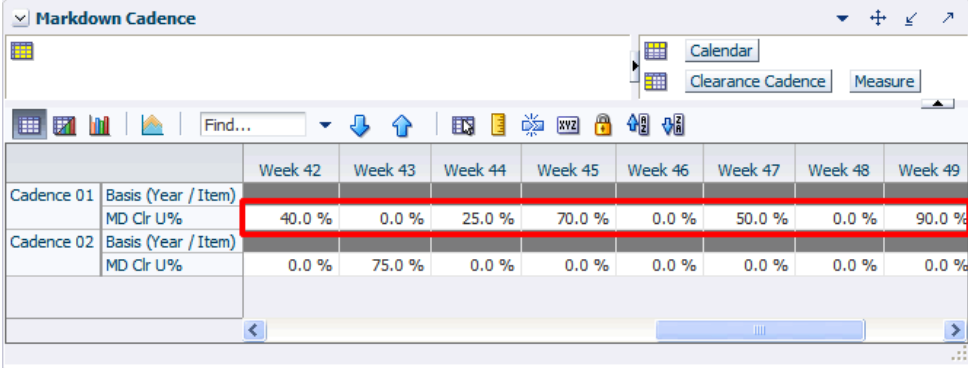
Figure 4–6 Markdown Cadence View: Basis (Year/Item) Selection



		all [Calendar]	Week 28	Week 29	Week 30	Week 31	Week 32	Week 33
Cadence 01	Basis (Year / Item)	Year						
	MD Clr U%	62.2 %	25.0 %	66.7 %	0.0 %	54.0 %	0.0 %	35.0 %
Cadence 02	Basis (Year / Item)	Item						
	MD Clr U%		25.0 %	0.0 %	0.0 %	35.0 %	0.0 %	50.0 %
Cadence 03	Basis (Year / Item)	Year						
	MD Clr U%	72.9 %	0.0 %	80.0 %	0.0 %	0.0 %	35.0 %	52.0 %
Cadence 04	Basis (Year / Item)	Year						
	MD Clr U%	45.4 %	35.0 %	0.0 %	56.0 %	0.0 %	76.0 %	0.0 %

3. Define the markdown percentages in specific weeks of the cadence.

Figure 4–7 Markdown Cadence View: Cadence 01



		Week 42	Week 43	Week 44	Week 45	Week 46	Week 47	Week 48	Week 49
Cadence 01	Basis (Year / Item)								
	MD Clr U%	40.0 %	0.0 %	25.0 %	70.0 %	0.0 %	50.0 %	0.0 %	90.0 %
Cadence 02	Basis (Year / Item)								
	MD Clr U%	0.0 %	75.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %

Figure 4–8 Markdown Cadence View: Cadence 02

	Week 36	Week 37	Week 38	Week 39	Week 40	Week 41	Week 42	Week 43
Cadence 01 Basis (Year / Item)								
MD Clr U%	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	40.0 %	0.0 %
Cadence 02 Basis (Year / Item)								
MD Clr U%	0.0 %	25.0 %	0.0 %	0.0 %	50.0 %	0.0 %	0.0 %	75.0 %

4. Save and commit the workbook.

Table 4–3 lists the measures available on this view.

Table 4–3 Markdown Cadence View Measures

Measure	Description
Basis (Year/Item)	The basis of the cadence. Options are year and item. ■ Year: Based on the absolute year. If the cadence is defined as starting on Week 36/10, it starts on Week 36 of the fiscal year. ■ Item: Based on the lifecycle of the item. If the cadence is defined as starting on Week 36/10, it starts on the tenth week of the item lifecycle.
MD Clr U%	The markdown clearance percentage. This is applicable from the selected week onwards.

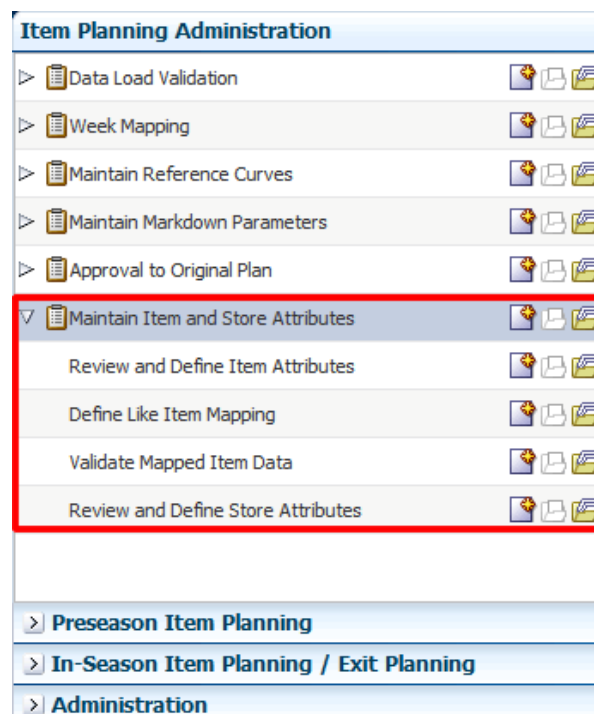
Maintain Item and Store Attributes

The Maintain Item and Store Attributes task allows you to map history and validate the results of mapping the history of a single item to a new item. This action provides a regular unit sales curve and quantity for reference when seeding and planning regular sales units.

The Maintain Item and Store Attributes task contains four steps:

- [Review and Define Item Attributes Step](#)
- [Define Like Item Mapping Step](#)
- [Validate Mapping Step](#)
- [Review and Define Store Attributes Step](#)

Figure 5–1 *Maintain Item and Store Attributes Steps*

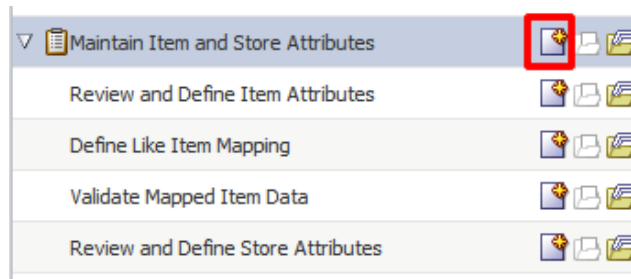


Building the Maintain Item and Store Attributes Workbook

To build a Maintain Item and Store Attributes workbook, perform the following steps:

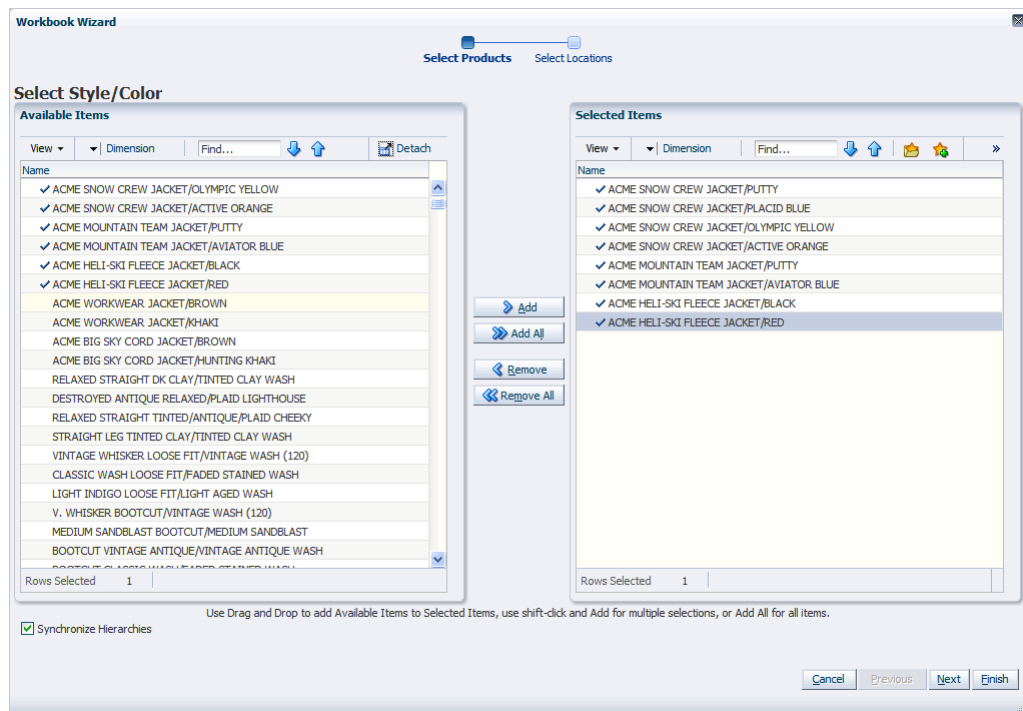
1. Click the **New Workbook** icon in the Maintain Item and Store Attributes task.

Figure 5–2 New Workbook Dialog Box

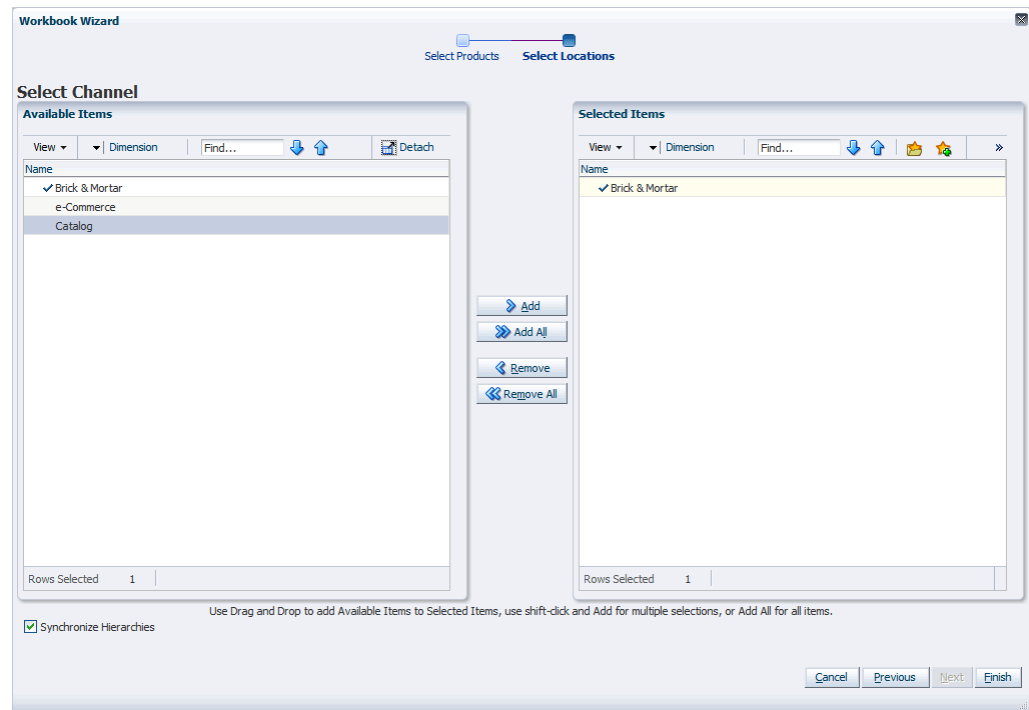


2. The wizard appears at the Select Style/Color step. Select the style-colors you want to map and click **Next**.

Figure 5–3 Item and Store Maintenance Wizard: Select Style/Color



3. The Select Channel step appears. Select the channels you want to map and click **Finish**. The workbook is built.

Figure 5–4 Item and Store Maintenance Wizard: Select Channel

Review and Define Item Attributes Step

This step contains one view: Review and Define Item Attributes. Use this view to view the item attributes that were created in the Assortment Planning application. If you do not use Assortment Planning, use this view to enter item attributes and create placeholders for new items.

Figure 5–5 Review and Define Item Attributes View

Review and Define Item Attributes								
	Color	Fabric	Subclass	Class	Vendor	Seasonality	Price Tier	Size Range
ACME HELI-SKI FLEECE JACKET/BLACK	Black	Fleece	MENS SPORT FLEECE-SUB	MENS SPORT FLEECE	Acme	Seasonal Basic	2 Better	SML
ACME HELI-SKI FLEECE JACKET/RED	Red	Fleece	MENS SPORT FLEECE-SUB	MENS SPORT FLEECE	Acme	Seasonal Basic	2 Better	SML
ACME MOUNTAIN TEAM JACKET/AVIATOR BLUE	Blue	Misc	SNOWBOARD JACKETS-SUB	SNOWBOARD JACKETS	Acme	Seasonal Basic	1 Good	SML
ACME MOUNTAIN TEAM JACKET/PUTTY	Putty	Misc	SNOWBOARD JACKETS-SUB	SNOWBOARD JACKETS	Acme	Seasonal Basic	1 Good	SML
ACME SNOW CREW JACKET/ACTIVE ORANGE	Orange	Misc	SNOWBOARD JACKETS-SUB	SNOWBOARD JACKETS	Acme	Seasonal Basic	3 Best	SML
ACME SNOW CREW JACKET/OLYMPIC YELLOW	Yellow	Misc	SNOWBOARD JACKETS-SUB	SNOWBOARD JACKETS	Acme	Seasonal Basic	3 Best	SML
ACME SNOW CREW JACKET/PLACID BLUE	Blue	Misc	SNOWBOARD JACKETS-SUB	SNOWBOARD JACKETS	Acme	Seasonal Basic	3 Best	SML
ACME SNOW CREW JACKET/PUTTY	Putty	Misc	SNOWBOARD JACKETS-SUB	SNOWBOARD JACKETS	Acme	Seasonal Basic	3 Best	SML

Table 5–1 describes the measures in this view.

Table 5–1 Review and Define Item Attributes View Measures

Measure	Description
Color	Display attributes of the item. This is read-only.
Fabric	Describes the fabric of the item. This is a user-defined string.
Subclass	Display attributes of the item. This is read-only.
Class	Display attributes of the item. This is read-only.

Table 5–1 (Cont.) Review and Define Item Attributes View Measures

Measure	Description
Vendor	Defines the vendor. This is a user-defined string.
Seasonality	Defines the seasonality of the item. The available options are loaded through the batch process.
Price Tier	Defines the price tier of the item. The available options are loaded through the batch process.
Size Range	Defines the kind of size range used for the item. The available options are loaded through the batch process.

Define Like Item Mapping Step

This step contains one view: Map Items. Use this view to map an item to a like item. This item will use the history of the like item. This is useful for new items that do not have sales history and are expected to have similar sales as the like item. After you have mapped the items, specify the start and end weeks for the mapped history. This selected date range is used for seeding the new item's history.

In order to map an item to a like item, you must build the workbook so that it contains both items.

Figure 5–6 Map Items View

	Like Item	Wp Start Week	Item
ACME HELI-SKI FLEECE JACKET/BLACK	ACME TAHOE DOWN VEST/BLACK	1/8/2011	3/19/2011
ACME HELI-SKI FLEECE JACKET/RED	ACME TAHOE DOWN VEST/BLACK	1/8/2011	3/19/2011
ACME LEATHER JACKET/BLACK	ACME TAHOE DOWN VEST/BLACK	1/8/2011	3/19/2011
ACME MOUNTAIN TEAM JACKET/AVIATOR BLUE	ACME TAHOE DOWN VEST/BLACK	1/8/2011	3/19/2011
ACME MOUNTAIN TEAM JACKET/PUTTY	ACME TAHOE DOWN VEST/BLACK	1/8/2011	3/19/2011
ACME SNOW CREW JACKET/ACTIVE ORANGE	ACME TAHOE DOWN VEST/BLACK	1/8/2011	3/19/2011
ACME SNOW CREW JACKET/OLYMPIC YELLOW	ACME TAHOE DOWN VEST/BLACK	1/8/2011	3/19/2011
ACME SNOW CREW JACKET/PLACID BLUE	ACME TAHOE DOWN VEST/BLACK	1/8/2011	3/19/2011
ACME SNOW CREW JACKET/PUTTY	ACME TAHOE DOWN VEST/BLACK	1/8/2011	3/19/2011
ACME TAHOE DOWN VEST/AVIATOR BLUE		1/8/2011	3/19/2011
ACME TAHOE DOWN VEST/BLACK		1/8/2011	3/19/2011
ACME TAHOE DOWN VEST/GREEN MOUNTAIN		1/8/2011	3/19/2011
ACME TAHOE DOWN VEST/KHAKI		1/8/2011	3/19/2011
ACME WORKWEAR JACKET/BROWN	ACME TAHOE DOWN VEST/BLACK	1/8/2011	3/19/2011
ACME WORKWEAR JACKET/KHAKI	ACME TAHOE DOWN VEST/BLACK	1/8/2011	3/19/2011

To map items, perform the following steps:

1. Ensure that **all[Location]** is visible in the calendar dimension. Like item mapping applies to all channels; therefore, it can only be selected at the all location level.
2. In the Like Item measure, select the item whose history you want to use for the new item.
3. In the Wp Start Week measure, select the starting date for the mapped history.
4. In the Item Mapping End Week measure, select the ending date for the mapped history. Only the data within the date range that you have created is mapped to the new item.
5. When finished mapping items, select the **Map Like Item** button in the upper right corner.

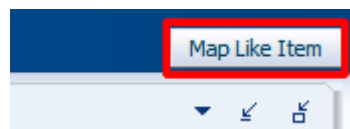
Figure 5–7 Map Like Item Button

Table 5–2 describes the measures in this view.

Table 5–2 Map Items View Measures

Measure	Description
Like Item	Use this measure to select an item to use as the source to generate historical values for another item.
Wp Start Week	The working plan starting week. This is the first week of the like item history that should be assigned to the item.
Item Mapping End Week	The last week of mapping. This is the last week of the like item history that should be assigned to the item.

Validate Mapping Step

The Validate Mapping step contains a single view called Review Mapped Sales.

Use this view to review the items and item histories of the items that you mapped in the [Define Like Item Mapping Step](#).

Figure 5–8 Review Mapped Sales

		9/3/2011	9/10/2011	9/17/2011	9/24/2011	10/1/2011	10/8/2011
ACME HELI-SKI FLEECE JACKET/BLACK	Mapped Sls Reg U	0	0	0	0	0	0
	Wp Sls Reg U	0	0	0	0	0	0
ACME HELI-SKI FLEECE JACKET/RED	Mapped Sls Reg U	0	0	0	0	0	0
	Wp Sls Reg U	0	0	0	0	0	0
ACME MOUNTAIN TEAM JACKET/AVIATOR BLUE	Mapped Sls Reg U	0	0	0	0	0	0
	Wp Sls Reg U	0	0	0	0	0	0
ACME MOUNTAIN TEAM JACKET/PUTTY	Mapped Sls Reg U	0	0	0	0	0	0
	Wp Sls Reg U	0	0	0	0	0	0
ACME SNOW CREW JACKET/ACTIVE ORANGE	Mapped Sls Reg U	0	0	0	0	0	0
	Wp Sls Reg U	0	0	0	0	0	0
ACME SNOW CREW JACKET/OLYMPIC YELLOW	Mapped Sls Reg U	0	0	0	0	0	0
	Wp Sls Reg U	0	0	0	0	0	0
ACME SNOW CREW JACKET/PLACID BLUE	Mapped Sls Reg U	0	0	0	0	0	0
	Wp Sls Reg U	0	0	0	0	0	0
ACME SNOW CREW JACKET/PUTTY	Mapped Sls Reg U	0	0	0	0	0	0

Table 5–3 describes the measures in this view.

Table 5–3 Review Mapped Sales View Measures

Measure	Description
Mapped Sls Reg U	Mapped history for regular sales units.
Wp Sls Reg U	Working plan for regular sales units.

Review and Define Store Attributes Step

This step contains a single view: Review and Define Store Attributes. Use this view to view the performance groups and size groups that were assigned to the store in the Assortment Planning application.

In Assortment Planning, the assortment planner creates a performance group and a size group for each class and buying period. This is why the calendar and product dimensions are shown in this view instead of just location. Because buying periods are not taken into account for performance groups in Item Planning, item planners typically use the performance group information for all weeks in the buying period. However, because performance groups are created at the class level in Assortment Planning, you can view the stores across classes. This is useful because a store can belong to different clusters for different classes.

Figure 5–9 Review and Define Store Attributes View

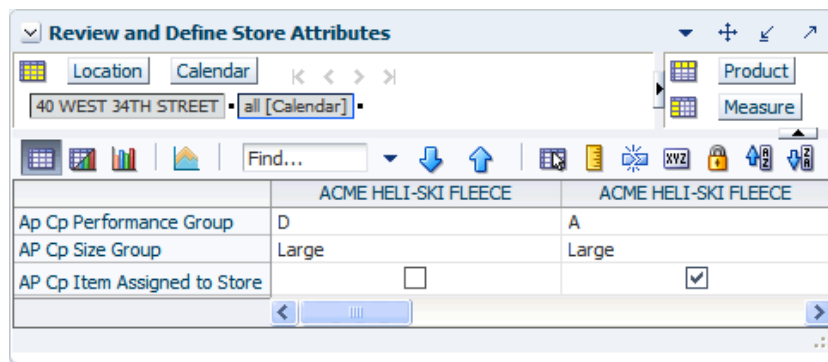


Table 5–4 describes the measures in this view.

Table 5–4 Review and Define Store Attributes Measures

Measure	Description
Ap Cp Performance Group	The performance group that the store was assigned to in Assortment Planning. Assortment planners assign a performance level or grade to a store to denote how well that store sells a particular class of products. The form of measure used to denote performance is determined by the assortment planner. Typical performance group formats: A, B, C; 1, 2, 3, and so on.
Ap Cp Size Group	The size group that the store was assigned to in Assortment Planning. Size groups are based on the floor space of the store. The form of measure used to denote the store size is determined by the assortment planner. Typical size group formats: small, medium, large; S, M, L; 1, 2, 3, and so on.
Ap Cp Item Assigned to Store	Denotes whether the product (class, subclass, style/color) is assigned to the store.

Set Initial COE Parameters

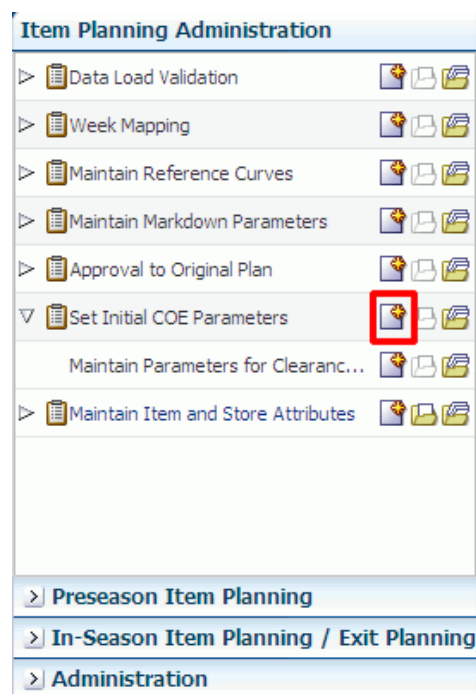
The Set Initial COE Parameters task is used to set the Exit Week, Salvage Value % Off, and EOL Sell Thru % measures that are exported to COE in batch processing. These parameters are used by COE in the weekly model run to provide an optimized markdown forecast.

Building the Set Initial COE Parameters Workbook

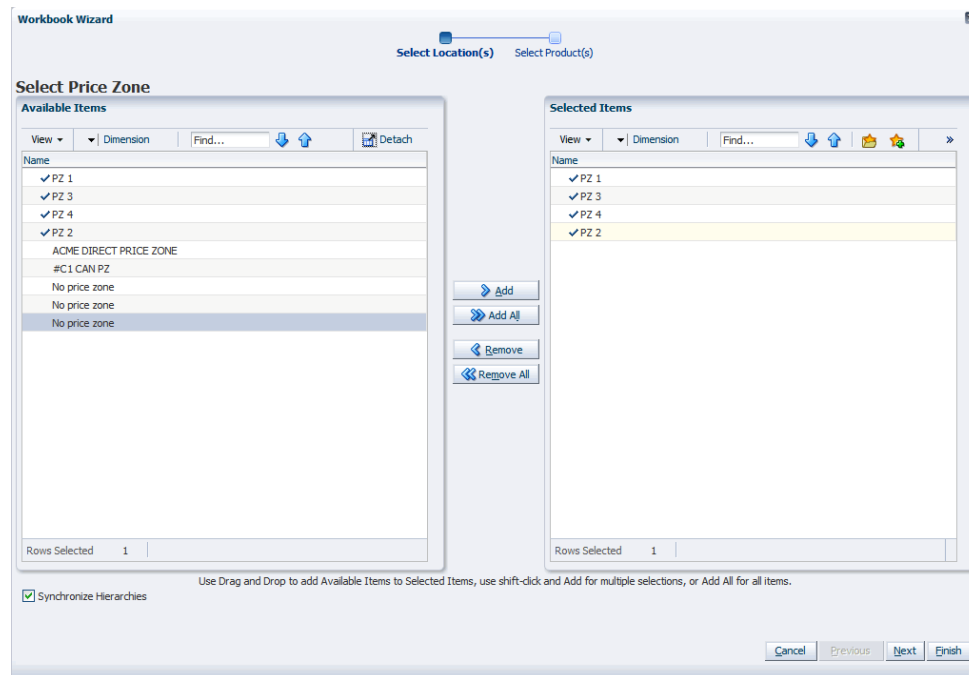
To build the workbook, perform the following steps:

1. Click the **Create New Workbook** icon in the Set Initial COE Parameters task.

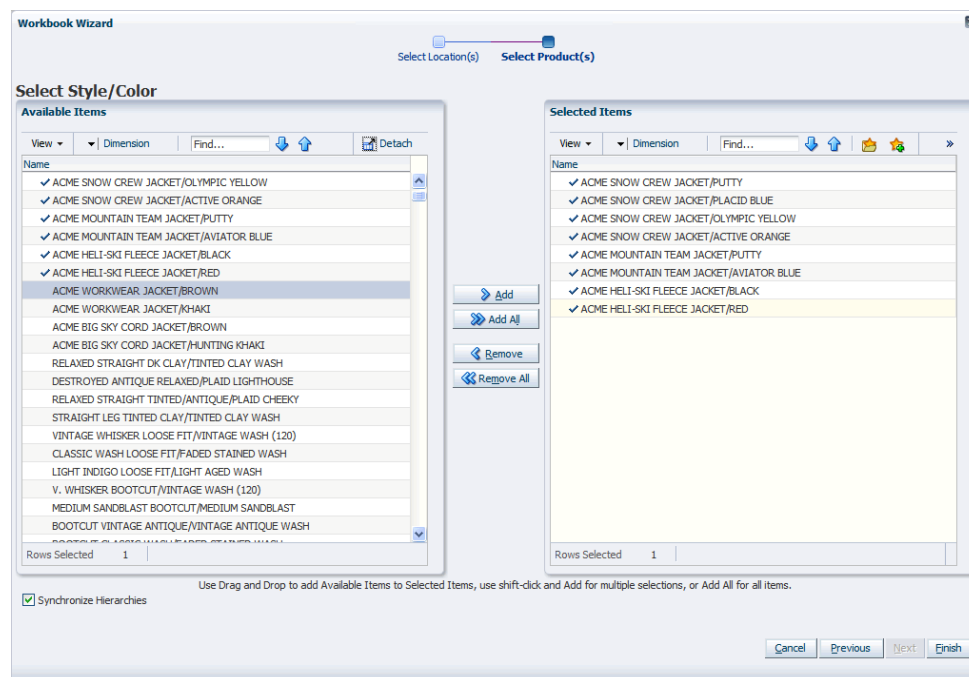
Figure 6–1 Create New Workbook Icon



2. The workbook wizard opens at the Select Price Zone step. Select the price zones that you want to plan and move them to the Selected Items box. Click **Next**.

Figure 6–2 Workbook Wizard: Price Zone Selection

3. The Select Style/Color step of the workbook wizard appears. Select the style-colors you want to plan and move them to the Selected Items box. Click **Finish**.

Figure 6–3 Workbook Wizard: Product Selection

The workbook is built, and the [Set Initial COE Parameters View](#) opens.

Maintain Parameters for Clearance Optimization Step

This step has one view: Set Initial COE Parameters. At this step, set the exit week, sell through percentage, and salvage value for each style/color.

Figure 6–4 Set Initial COE Parameters View

Measure	Description
COE Initial EOL Exit Week	1/29/2011
COE Initial EOL Sell Thru %	80.0 %
COE Initial EOL Salvage Value % Off	20.0 %

Table 6–1 Set Initial COE Parameters View Measures

Measure	Description
COE Initial EOL Exit Week	The Exit Date COE uses to calculate the Recommended Clearance Markdown. This measure is a single hierarchy selection that allows the user to select the week ending date of the exit week.
COE Initial EOL Salvage Value % Off	The percent off the Current Ticketed Retail Price that is used to determine the Salvage Value Price for any remaining inventory at the Exit Date.
COE Initial EOL Sell Thru %	The Recommended Sell Thru % used by COE to determine the optimal Recommended Clearance Markdown Price Plan that will achieve the desired Sell Thru %.

After you have entered the values, commit the parameters to the RPAS database. Then, the batch process exports these files and transfers them to COE for loading within the COE Business Rules Manager.

Commit Parameters

In the Set Initial COE Parameters view, click **Commit** in the toolbar. Or, from the File menu, select the **Commit** option.

Once the commit has occurred, the commit status changes to Committed.

Develop and Approve Item Plans

During the preseason planning period, use the Develop and Approve Item Plans task to create item plans at the style/color level. This task has five steps:

- [Review Assortment Plan Step](#)
- [Set Up Parameters to Seed Item Plans Step](#)
- [Assign Pricing Events Step](#)
- [Manage Item Plans and Promotional Lifts Step](#)
- [Review and Approve Item Plans Step](#)

This task and steps are shown in [Figure 7-1](#).

Figure 7-1 *Develop and Approve Item Plans Task*

+ Item Planning Administration		
Preseason Item Planning		
[-] [Icon] Develop and Approve Item Plans	[Icon]	[Icon]
Review Assortment Plan	[Icon]	[Icon]
Set Up Parameters to Seed Item Plans	[Icon]	[Icon]
Assign Pricing Events	[Icon]	[Icon]
Manage Item Plans and Promotional Lifts	[Icon]	[Icon]
Review and Approve Item Plans	[Icon]	[Icon]
+ In-Season Item Planning / Exit Planning		
+ Administration		

Below is the general process of creating an item plan:

1. Optional: Consult the assortment plan created in the Assortment Planning application in the [Review Assortment Plan Step](#).
2. Create a sales and markdown plan in the [Set Up Parameters to Seed Item Plans Step](#)
3. Assign promotions to style-colors and review their promotional impact in the [Assign Pricing Events Step](#).

4. Seed the plan in the [Set Up Parameters to Seed Item Plans Step](#).
5. Review the sales and markdowns plan in the [Review and Approve Item Plans Step](#).
6. Create a receipts and inventory plan and calculate the receipt flow in the [Manage Item Plans and Promotional Lifts Task: Receipt and Inventory Plan](#).
7. Review the receipts and inventory plan in the [Manage Item Plans and Promotional Lifts Task: Receipt and Inventory Plan](#).
8. Review the entire plan, compare it to the MFP targets, and approve the plan in the [Review and Approve Item Plans Step](#).

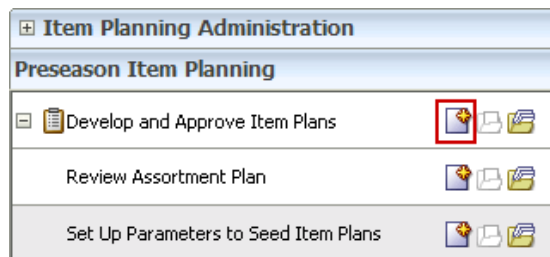
This process is described in detail throughout this chapter.

Building the Develop and Approve Item Plans Workbook

To build the Develop and Approve Item Plans workbook, perform the following steps:

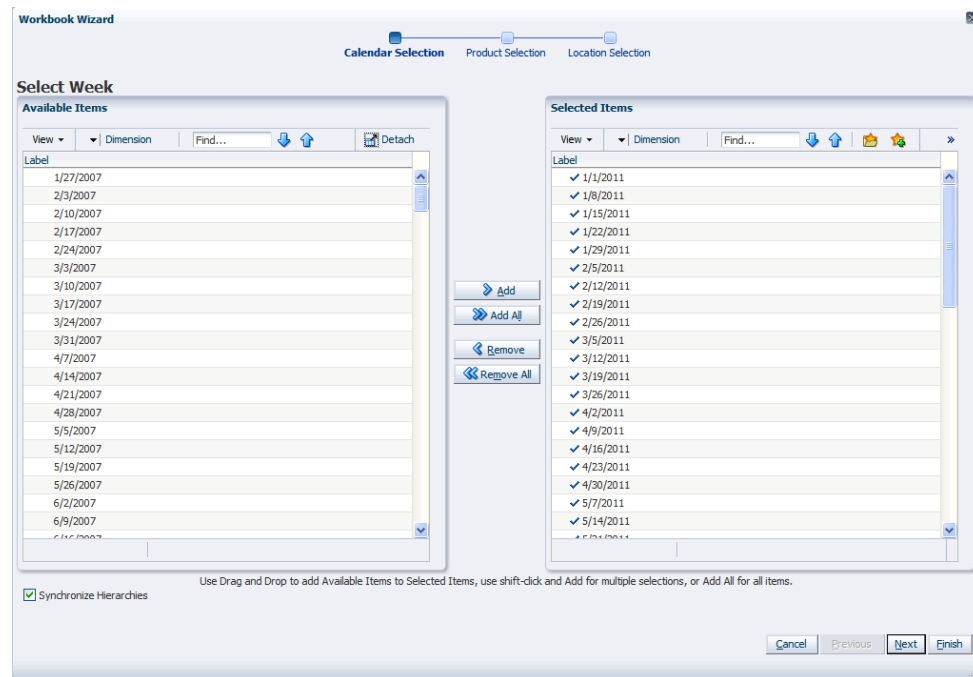
1. Click the **Create New Workbook** icon in the Develop and Approve Item Plans task.

Figure 7–2 Create New Workbook Icon

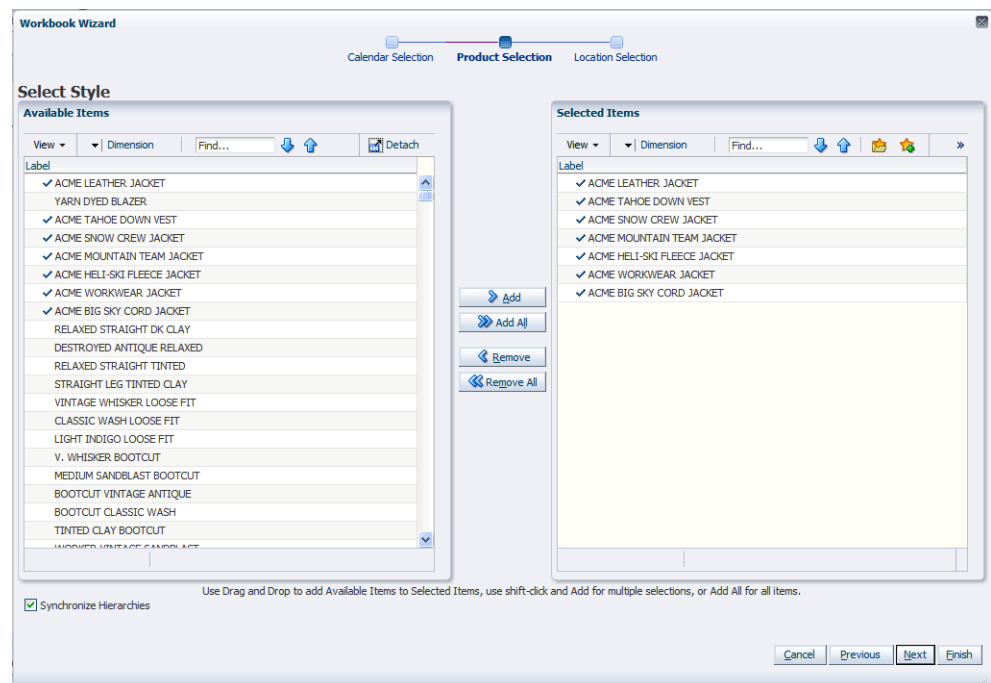


2. The workbook wizard opens at the Calendar Selection step. Select the weeks that you want to plan and move them to the Selected Items box. Click **Next**.

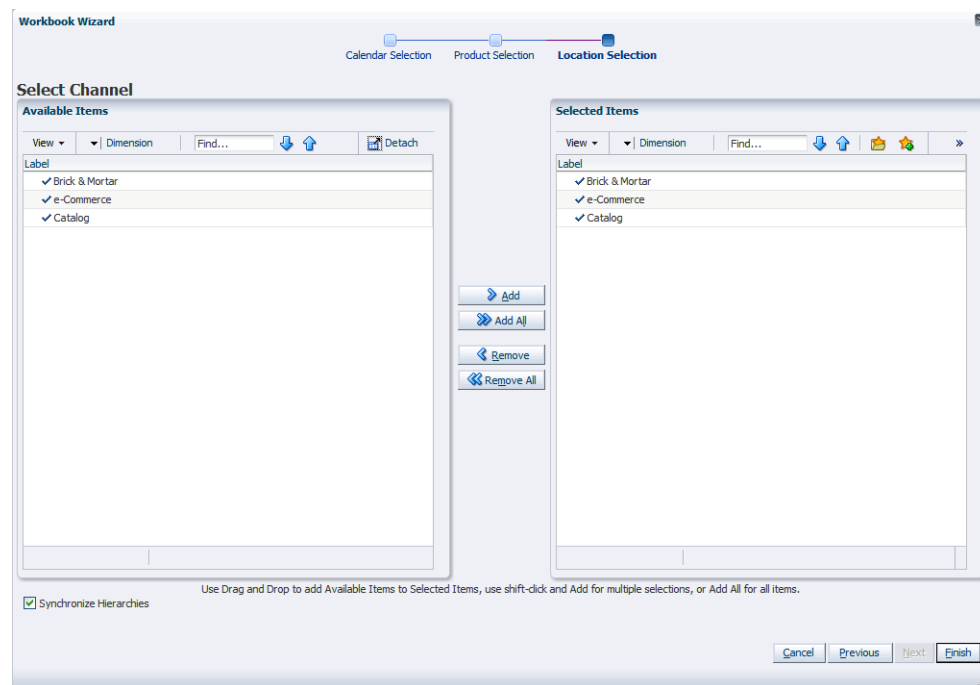
Note: When choosing the weeks to include in the workbook, ensure that you accommodate for the receipt arrival week, not just the start sell week. For instance, if the start sell week is 1/15/2011, and the receipt time is two weeks, the workbook should start from 1/1/2011.

Figure 7–3 Workbook Wizard: Calendar Selection

3. The Product Selection step of the workbook wizard appears. Select the styles you want to plan and move them to the Selected Items box. Click **Next**.

Figure 7–4 Workbook Wizard: Product Selection

4. The Location Selection step of the workbook wizard appears. Select the channels you want to plan and move them to the Selected Items box. Click **Finish**.

Figure 7–5 Workbook Wizard: Location Selection

The Develop and Approve Item Plans workbook is built.

Review Assortment Plan Step

Review the views in the Assortment Plan step if you have loaded data from the Assortment Planning application. If you do not use Assortment Planning, continue to the [Set Up Parameters to Seed Item Plans Step](#).

Assortment Plan Parameters View

Use the Review Assortment Plan Parameters view to reference the parameters that the Assortment Planning user set for the same style/colors you are planning. When seeding your working plan in the [Item Plan Parameters View](#), you can choose to seed with this Assortment Plan data.

Figure 7–6 Assortment Plan Parameters View

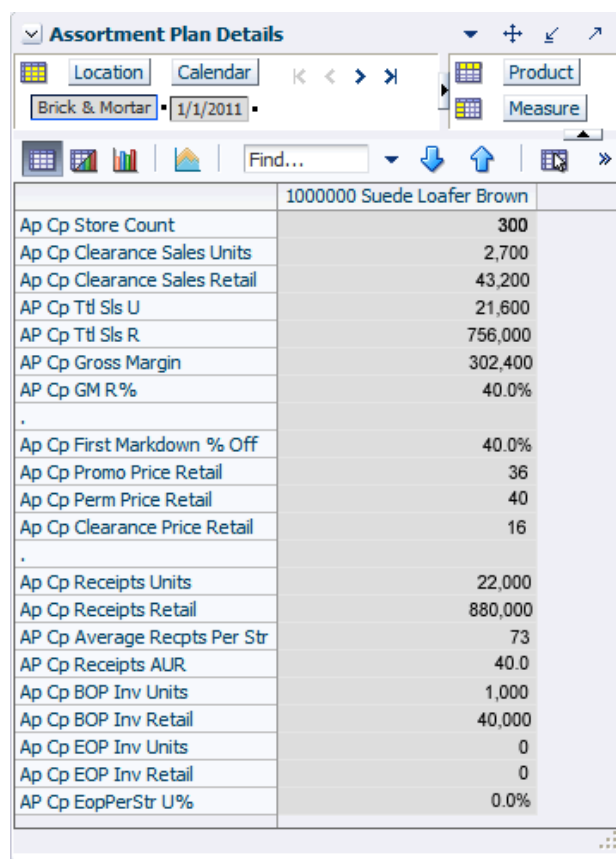
Assortment Plan Parameters		
Location: Brick & Mortar		
Product: Suede Loafer		
Measure: Black		
	1000000 Suede Loafer Brown	1000001 Suede Loafer Black
Start Sales Date	6/6/2011	6/6/2011
Number of weeks at Clearance Price	0	0
Number of Weeks at Regular Price	13	13
Product Cost	18	20
Product Original Ticket Price	0	0
Exit Date	10/10/2011	10/10/2011
Ap Cp Clearance Price Retail	12	0
Ap Cp Clearance Cost	0	9

Table 7-1 Assortment Plan Parameters View Measures

Measure	Description
Start Sales Date	The date the product is expected to start selling.
Number of weeks at Clearance Price	Number of weeks the item is expected to sell at Clearance Price.
Number of Weeks at Regular Price	Number of weeks the item is expected to sell at Regular Price.
Product Cost	The cost of the product.
Product Original Ticket Price	Initial retail of product.
Exit Date	The date that the product should be removed from the sales floor.
Ap Cp Clearance Price Retail	The clearance price set up in Assortment Planning.
Ap Cp Clearance Cost	The clearance cost set up in Assortment Planning.

Assortment Plan Details View

Use the Assortment Plan Details view to see the plan that was created in the Assortment Planning application for the same style-colors you are planning.

Figure 7-7 Assortment Plan Details View


Assortment Plan Details	
Location	Calendar
Brick & Mortar	1/1/2011
Product	Measure
Find...	
1000000 Suede Loafer Brown	
Ap Cp Store Count	300
Ap Cp Clearance Sales Units	2,700
Ap Cp Clearance Sales Retail	43,200
AP Cp Ttl Sls U	21,600
AP Cp Ttl Sls R	756,000
AP Cp Gross Margin	302,400
AP Cp GM R%	40.0%
.	
Ap Cp First Markdown % Off	40.0%
Ap Cp Promo Price Retail	36
Ap Cp Perm Price Retail	40
Ap Cp Clearance Price Retail	16
.	
Ap Cp Receipts Units	22,000
Ap Cp Receipts Retail	880,000
AP Cp Average Recpts Per Str	73
AP Cp Receipts AUR	40.0
Ap Cp BOP Inv Units	1,000
Ap Cp BOP Inv Retail	40,000
Ap Cp EOP Inv Units	0
Ap Cp EOP Inv Retail	0
AP Cp EopPerStr U%	0.0%

Table 7-2 lists the measures available on this view.

Table 7–2 Assortment Plan View Step Measures

Measure	Description
Ap Cp Store Count	The number of stores for which this style/color is planned for in the approved plan from the Assortment Planning application.
Ap Cp Clearance Sales Units	Assortment Planning Current Plan Clearance Sales units.
Ap Cp Clearance Sales Retail	Assortment Planning Current Plan Clearance Sales retail.
Ap Cp Ttl Sls U	Assortment Planning Current Plan Total Sales Units.
Ap Cp Ttl Sls R	Assortment Planning Current Plan Total Sales Retail.
AP Cp Gross Margin	Assortment Planning Current Plan Gross Margin.
Ap Cp GM R%	Assortment Planning Current Plan Gross Margin rate.
Ap Cp First Markdown % Off	Initial Markdown Taken expressed as a rate.
Ap Cp Promo Price Change %	Assortment Planning Current Plan Promotional Price Change %.
Ap Cp Perm Price Change %	Permanent Price Change expressed as a rate.
Ap Cp Clearance Price Retail	Assortment Planning Current Plan Clearance Price Change %.
Ap Cp Receipts Units	Receipts expressed as Units.
Ap Cp Receipts Retail	Assortment Planning Current Plan Receipts Retail.
AP Cp Average Recpts Per Str	Assortment Planning Current Plan Average Receipts per store.
AP Cp Receipts AUR	Assortment Planning Current Plan Receipts Average Unit Retail.
Ap Cp BOP Inv Units	The Beginning of Period inventory units from Assortment Planning's current plan.
Ap Cp BOP Inv Retail	The Beginning of Period inventory retail from Assortment Planning's current plan.
Ap Cp EOP Inv Retail	The End of Period inventory retail.
Ap Cp EOP Inv Units	The End of Period inventory units.
AP Cp EopPerStr U%	Assortment Planning Current Plan End of Period Per Store Unit %.

After you have reviewed the parameters from the Assortment Planning application, continue to the [Set Up Parameters to Seed Item Plans Step](#) to set your own parameters.

Set Up Parameters to Seed Item Plans Step

Use the views in the Item Planning Parameters step to create a weekly plan for the style-colors. This step has three views:

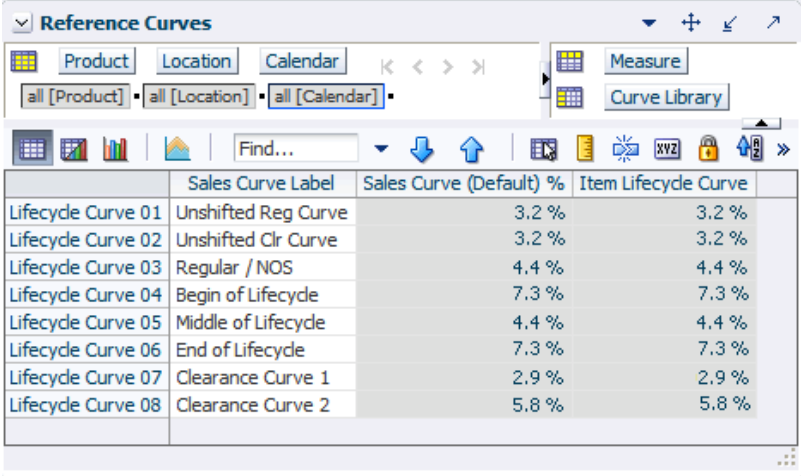
- [Reference Curves View](#)
- [Item Plan Parameters View](#)
- [Seed View](#)

Reference Curves View

Use this view to review the reference curves you created in the [Maintain Reference Curves](#) task. This view is for reference only. It is provided to help you assign these curves to the style/colors being planned. To edit the curves, return to the [Maintain Curve Profiles View](#).

Note: To view the data in the Sales Curve Label and Sales Curve (Default) % measures, ensure that the calendar hierarchy includes the all[Calendar] dimension and that the location hierarchy displays only the all[Location] dimension.

Figure 7–8 Reference Curves View



	Sales Curve Label	Sales Curve (Default) %	Item Lifecycle Curve
Lifecycle Curve 01	Unshifted Reg Curve	3.2 %	3.2 %
Lifecycle Curve 02	Unshifted Clr Curve	3.2 %	3.2 %
Lifecycle Curve 03	Regular / NOS	4.4 %	4.4 %
Lifecycle Curve 04	Begin of Lifecycle	7.3 %	7.3 %
Lifecycle Curve 05	Middle of Lifecycle	4.4 %	4.4 %
Lifecycle Curve 06	End of Lifecycle	7.3 %	7.3 %
Lifecycle Curve 07	Clearance Curve 1	2.9 %	2.9 %
Lifecycle Curve 08	Clearance Curve 2	5.8 %	5.8 %

Table 7–3 lists the measures available on this view.

Table 7–3 Reference Curves View Measures

Measure	Description
Sales Curve Label	Displays the label for the lifecycle curve. This label is created in the Maintain Reference Curves task.
Sales Curve (Default)%	Displays percent-to-total sales percentage in the weeks of the curve. This is set in the Maintain Reference Curves task.
Item Lifecycle Curve	Displays the sales curve for the item.

Next, continue to the [Item Plan Parameters View](#).

Item Plan Parameters View

Use this view to set the parameters of the item plan. This creates the weekly sales unit plan.

Figure 7–9 Item Plan Parameters - Sales Parameters Measure Profile

	Brick & Mortar	Catalog	e-Commerce
# Stores	100	1	1
Start Sell Week	8/13/2011	8/13/2011	8/13/2011
Out of Stock Week	12/31/2011	12/31/2011	12/31/2011
Clearance Cadence	Cadence 01	Cadence 01	Cadence 01
Weeks on Sale (Reg + Promo)	14	14	14
Rate of Sale (APS per wk Reg & Promo)	5	75	250
Baseline Sales U	7,000	7,000	7,000
Baseline Sales Curve Selection	Early Ramp Up	Early Ramp Up	Early Ramp Up
Shrink Target %	2.0 %	2.0 %	2.0 %
Wp Sls Reg U	3,535	3,535	3,535
Wp Sls Promo U	4,361	4,361	4,361
Wp Sls Clr U	970	970	970
Wp Ttl Sls U	8,866	8,866	8,866
Reg Sales %	39.9 %	39.9 %	39.9 %
Promotional Sales %	49.2 %	49.2 %	49.2 %
Clearance Sls %	10.9 %	10.9 %	10.9 %
Regular Price	\$50.00	\$50.00	\$50.00
Regular Cost	\$20.00	\$20.00	\$20.00
Clearance Cost	\$20.00	\$20.00	\$20.00
Wp Ttl Sls R	413,530	413,530	413,530
Salvage U	511	511	511
Salvage %	5.8 %	5.8 %	5.8 %
Salvage Value	5	5	5
Wp Sales Net VAT R	413,530	413,530	413,530
Wp GM	223,471	223,471	223,471
Wp GM %	54.0 %	54.0 %	54.0 %

To set the item plan parameters, perform the following steps:

1. In the # Stores measure, enter the number of stores.
2. Define the start sell and out of stock weeks in the Start Sell Week and Out of Stock Week measures.
3. In the Clearance Cadence measure, select the cadence to be applied to the style/color. These cadences are created in the [Maintain Markdown Parameters](#) task.
4. In the Rate of Sale measure, enter the average units of the style/color that are sold per store, per week. (This is used for baseline sales calculation. It is useful when seeding dales to weeks.)
5. Click **Calculate**. The Baseline Sales U measure is calculated. This measure displays the baseline sales units for the regular and promotional period.
6. In the Baseline Sales Curve Selection measure, select the reference curve to apply to the style/color. These reference curves are created in the [Maintain Reference Curves](#) task.
7. In the Shrink Target %, enter the planned shrink for the style/color. Each week is a planned shrink that is based on a certain percentage of sales for the week.
8. In the Regular Price, Regular Cost, and Clearance Cost measures, enter the price, cost, and clearance cost of the style/color.
9. Click **Calculate**.

10. In the Salvage Value measure, enter the amount that the style/color is worth in the last week of the salvage period. The salvage period is when the style/color has reached the end of its life. Therefore, the salvage value is the price you can recover by selling this item to a clearance channel.
11. If you are computing value added tax, edit the Wp Sales Net VAT R measure if needed.

After you have set the parameters, continue to the [Seed View](#) to seed these parameters into the item plan for the style/color.

Note: If the style/color belongs to a promotion, you should map the promotions to the style/color in the [Assign Pricing Events Step](#) before seeding.

Item Plan Parameters View - Measure Profiles

Along with the Sales Parameter measures profile, the Item Plan Parameters view also includes the following measure profiles:

- Receipt Parameters - See [Item Plan Parameters View: Receipt Parameters Measure Profile](#)
- Markdown Parameters - See the figure ([Figure 7-10](#)) below.

Figure 7-10 Item Plan Parameters - Markdown Parameters Measure Profile

	Brick & Mortar	Catalog	e-Commerce
# Stores	100	1	1
Start Sell Week	8/27/2011	8/27/2011	8/27/2011
Clearance Cadence	Cadence 01	Cadence 01	Cadence 01
Clr 1 - Start week	11/26/2011	11/26/2011	11/26/2011
Clr 1 - % off	25.0 %	25.0 %	25.0 %
Clr 2 - Start week	12/17/2011	12/17/2011	12/17/2011
Clr 2 - % off	50.0 %	50.0 %	50.0 %
Clr 3 - Start week			
Clr 3 - % off	0.0 %	0.0 %	0.0 %
Out of Stock Week	12/31/2011	12/31/2011	12/31/2011
Clearance Sell-Off %	100.0 %	100.0 %	100.0 %
Wp Sls Clr U	970	970	970
Clearance Sls %	10.9 %	10.9 %	10.9 %
Sell Thru Reg %	90.0 %	90.0 %	90.0 %
Wp GM	223,471	223,471	223,471
Wp GM %	54.0 %	54.0 %	54.0 %

Set Up Parameters to Seed Plan Task: Receipt and Inventory Plan

After you have developed the sales and inventory plan, use the Item Plan Parameters view to create the receipt and inventory plan.

Item Plan Parameters View: Receipt Parameters Measure Profile

Use the receipt parameters measure profile in this view to develop the receipt and inventory plan.

Figure 7–11 Item Plan Parameters View: Receipt Parameters Measure Profile

	Brick & Mortar	Catalog	e-Commerce
# Stores	100	100	100
Start Sell Week	8/27/2011	8/27/2011	8/27/2011
Wp Sls Reg+Pro U	7,896	7,896	7,896
Sell Thru Reg %	90.0 %	90.0 %	90.0 %
Wp Receipts U	9,454	9,454	9,454
.			
Wp BOS U	100	100	100
Wp BOS R	50	50	50
Wp BOS C	20	20	20
.			
Receipt Frequency	2	2	2
Initial Receipt %	10.0 %	10.0 %	10.0 %
Presentation Min	24	24	24
Safety Stock (weeks)	1	1	1
Receipt Lead Time	0	0	0
Flow Receipts	☒	☒	☒
Wp Receipt Start Week	8/13/2011	8/13/2011	8/13/2011
.			
Wp EOP Inv U	0	0	0
Wp EOP Inv R	0	0	0
Wp EOP Inv C	0	0	0
Wp Cum Avg Inv U	1,688	1,688	1,688
Wp Cum Avg Inv R	73,549	73,549	73,549
Wp Cum Avg Inv C	31,929	31,929	31,929
Wp Cum Turn U	5.3	5.3	5.3
Wp Cum Turn R	5.0	5.0	5.0
Wp Cum Turn C	5.6	5.6	5.6

To create a receipt and inventory plan, perform the following steps:

1. Change the measure profile to Receipt Parameters.
2. In the Receipt Lead Time measure, enter the number of weeks before the start sell week that you want to schedule receipts.
3. In the Receipt Frequency measure, enter the number of weeks between each receipt. For example, 1 means that receipts arrive every week. 2 means that receipts arrive every other week.
4. In the Initial Receipt % measure, enter the percentage of total receipts to be included the first receipt drop.
5. In the Presentation Min measure, enter the minimum amount of inventory on the sales floor per store. This is used only in the initial receipt and can be thought of as a fixture fill.
6. In the Safety Stock (Weeks) measure, enter the number of weeks of sales in the future that each receipt drop can fulfill. This safety stock setting applies to all

receipt drops except the initial receipt drop. It is based on a future week of sales, not an average week of sales.

7. In the Sell Thru Reg % measure, enter the target percentage of sales to be reached during the regular and promotional periods. This number is used as a guideline for calculating receipts. For instance, if set to 85%, this means that 85% of the style/color is sold during the regular and promotional periods, and 15% is left to be sold during the clearance period.
8. Select the **Flow Receipts** check box.
9. Click the **Calculate Receipt Flow** button in the upper right corner.

Figure 7-12 Planning Actions: Calculate Receipt Flow



The Wp Receipts U and Receipt Start Week measures are populated. After you have calculated the receipt flow, continue to the [Item Plan View: Receipts and Inventory Measure Profile](#) to view the receipt and inventory plan.

Table 7-4 Item Plan Parameters View - Receipt Parameters Measure Profile

Measure	Description
# Stores	The number of stores that sell the style/color.
Start Sell Week	The first week that the style/color is sold.
Wp Sls Reg + Pro U	The combined total of the planned regular and promotional units. This is a calculated measure.
Sell Thru Reg %	The target percentage of sales to be reached during the regular and promotional periods.
Wp BOS U	The planned beginning of season units.
Wp BOS R	The planned beginning of season retail.
Wp BOS C	The planned beginning of season cost.
Receipt Frequency	The number of weeks between each receipt drop.
Initial Receipt %	The percentage of total receipts to be included in the first receipt drop.
Presentation Min	The minimum amount of inventory on the sales floor per store. This is used only in the initial receipt and can be thought of as a fixture fill.
Safety Stock (weeks)	The number of weeks of sales in the future that each receipt drop can fulfill. This applies to all receipt drops except the initial one. It is based on a future week of sales, not an average week of sales.
Receipt Lead Time	The number of weeks before the start sell week that the initial receipt drop arrives.
Flow Receipts	Check this measure to calculate the receipt flow based on the parameters in this view.
Wp Receipt Start Week	The week that initial receipt drop occurs.
Wp EOP U	The planned end of period units. This is a calculated measure.
Wp EOP R	The planned end of period retail. This is a calculated measure.

Table 7–4 (Cont.) Item Plan Parameters View - Receipt Parameters Measure Profile

Measure	Description
Wp EOP C	The planned end of period cost. This is a calculated measure.
Wp Cum Avg Inv U	The planned cumulative average inventory units. This is a calculated measure.
Wp Cum Avg Inv R	The planned cumulative average inventory retail. This is a calculated measure.
Wp Cum Avg Inv C	The planned cumulative average inventory cost. This is a calculated measure.
Wp Cum Turn U	The planned cumulative turn units. This is a calculated measure.
Wp Cum Turn R	The planned cumulative turn retail. This is a calculated measure.
Wp Cum Turn C	The planned cumulative turn cost. This is a calculated measure.

Seed View

Use this view to seed the item plan with data. This creates a demand curve on which to spread the initial targets of the item plan. You can seed with any of the following options:

- LY: Last year's data.
- Adj LY: Adjusted last year's data.
- AP: Data from the Assortment Planning (AP) application. If you use AP and you have loaded the AP data into Item Planning, you can review this data in the [Review Assortment Plan Step](#).
- Parameters: The parameters that you have created in the [Item Plan Parameters View](#).
- Accepted Price Plan: The price plan you create during in-season planning. This price plan is selected in the [Accept Price Plans and Review Impact Step](#) of the [Review and Accept Price Plans](#) task.

Or, you can instead choose to not seed the plan, which allows you to create a plan manually by keying in sales at a weekly level.

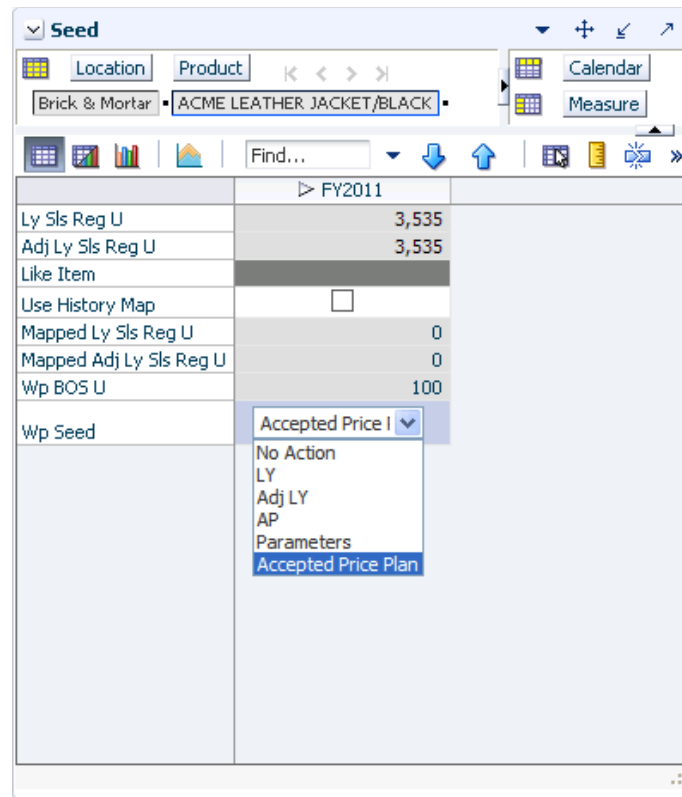
Figure 7–13 Seed View

Table 7–5 lists the measures available on this view.

Table 7–5 Seed View Measures

Measure	Description
Ly Sls Reg U	The regular units from last year's sales.
Adj Ly Sls Reg U	The adjusted regular units from last year's sales.
Like Item	The style/color that you mapped the current style/color to in the Maintain Item and Store Attributes task.
Use History Map	Select this option to use the history of the style that you mapped the current style to in the Maintain Item and Store Attributes task.
Mapped Ly Sls Reg U	The regular units from last year's sales of the like item.
Mapped Adj Ly Sls Reg U	The adjusted regular units from last year's sales of the like item.
Wp BOS U	The planned Beginning of Season total units.
Wp Seed	The source used to seed the working plan. Use the dropdown to select the source to use for seeding.

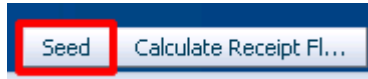
Seeding the Plan

Perform the following steps to seed the plan:

1. Roll the calendar dimension up to year.
2. Select the style/color you want to seed in the product dimension.
3. In the Wp Seed measure, choose the seed option.

4. Select **Use Hist Map** if you want to use the data of the like item shown in the Like Item measure.
5. When you have selected all the data you want to seed, click the **Seed** button in the upper right corner.

Figure 7–14 Seed Button



6. A confirmation message appears, stating that the data has been successfully seeded. Click **OK**.

Figure 7–15 Seeding Success Message



After you have seeded, continue to the [Review and Approve Item Plans View](#) to approve the plan.

Assign Pricing Events Step

The Assign Pricing Events step contains four views that help you map style-colors to promotions:

- [Promotions Definition View](#)
- [Promotions Weeks View](#)
- [Promo Mapping View](#)
- [Markdown Cadence View](#)

Use the [Promo Mapping View](#) to map the style-colors and promotions. Use the other views as references about the promotions and markdown cadences.

Promotions Definition View

Use this view to review the lift and the lift override for the promotions. This view is read-only.

Figure 7–16 Promotions Definition View

	Reference Price Promo Disc R%	Sls Promo Lift U%	Sls Promo Lift U% Override
Back to School	10.0 %	111.1 %	120.0 %
Holiday	15.0 %	117.6 %	125.0 %
End of Month	30.0 %	142.9 %	140.0 %
Intro Special	32.0 %	147.1 %	85.0 %
Fall Sales	24.0 %	131.6 %	95.0 %

Table 7–6 lists the measures available on this view.

Table 7–6 Promotions Definition View Measures

Measure	Description
Reference Price Promo Disc R%	The promotional markdown discount. It represents the temporary reduction to the owned inventory price for promotional purposes. Expressed as a percentage of retail.
Sls Promo Lift U%	The promotional lift. This is the percent of increased sales that must occur to overcome the decrease in price to sell the same dollar amount.
Sls Promo Lift U% Override	The lift entered in this measure overrides the lift calculated in the Sls Promo Lift U% measure.

Promotions Weeks View

Use this view to review the promotion periods. This view is read-only.

Figure 7–17 Promotions Weeks View

	8/6/2011	8/13/2011	8/20/2011	8/27/2011	9/3/2011	9/10/2011	9/17/2011	9/24/2011
Back to School	☒	☒	☒	☐	☐	☐	☐	☐
Holiday	☐	☒	☒	☒	☐	☐	☐	☐
End of Month	☐	☐	☐	☒	☐	☐	☐	☒
Intro Special	☒	☒	☐	☐	☒	☒	☐	☐
Fall Sales	☐	☐	☐	☐	☐	☐	☒	☒

Promo Mapping View

Use this view to map the style/color to the promotions it belongs to. Style-colors can belong to more than one promotion, even if the promotions overlap.

Figure 7–18 Promo Mapping View

	1000000 Suede	1000001 Suede	1000002 Suede	1000003 Leather	1000004 Leather
Back to School	☐	☒	☐	☒	☐
Holiday	☒	☐	☐	☐	☐
End of Month	☒	☐	☐	☐	☐
Intro Special	☐	☒	☐	☐	☒
Fall Sales	☐	☐	☒	☐	☐

To map a style/color to a promotion, click the check box. You may select more than one promotion for a style/color.

Markdown Cadence View

Use this view to review the markdown cadences you created in the [Markdown Cadence View](#). This view is read-only.

Note: To see the Basis (Year/Item) measure data, ensure that all[Calendar] is displayed in the calendar hierarchy.

Figure 7–19 Markdown Cadence View

all [Calendar]			Week 28	Week 29	Week 30	Week 31	Week 32	Week 33
Cadence 01	Basis (Year / Item)	Year						
	MD Clr U%	52.3 %	25.0 %	66.7 %	0.0 %	54.0 %	0.0 %	35.0 %
Cadence 02	Basis (Year / Item)	Item						
	MD Clr U%	42.0 %	25.0 %	0.0 %	0.0 %	35.0 %	0.0 %	50.0 %
Cadence 03	Basis (Year / Item)	Item						
	MD Clr U%	63.9 %	0.0 %	80.0 %	0.0 %	0.0 %	35.0 %	52.0 %
Cadence 04	Basis (Year / Item)	Year						
	MD Clr U%	50.7 %	35.0 %	0.0 %	56.0 %	0.0 %	76.0 %	0.0 %
Cadence 05	Basis (Year / Item)	Year						
	MD Clr U%	35.5 %	25.0 %	35.0 %	0.0 %	0.0 %	32.0 %	12.0 %

Table 7–7 lists the measures available on this view.

Table 7–7 Markdown Cadence View Measures

Measure	Description
MD Clr U%	The markdown clearance percentage starting from the week of the year or the style/color's lifecycle.

Table 7–7 (Cont.) Markdown Cadence View Measures

Measure	Description
Basis (Year/Item)	The basis that the cadence is based on. Options are year and item.

Manage Item Plans and Promotional Lifts Step

The views in this step display the weekly plan for the sales and markdowns that was created by the parameters you have set so far. Use these views to review the plan:

- [Item Plan View](#)
- [Promo Details View](#)

Item Plan View

Use this view to review the weekly plan for the sales and markdowns that has been created by all of the parameters and promotions you have created so far. If you need to adjust the plan, return to the [Item Plan Parameters View](#) to adjust the parameters, seed from parameters in the [Seed View](#), and then return to this view to review the results. Continue this process until you are satisfied with the sales and markdown plan.

Figure 7–20 Item Plan View

The screenshot shows the 'Item Plan' window for 'ACME LEATHER JACKET/BLACK'. The table displays weekly sales and markdown data for August FY2011. The columns represent weeks starting from 7/30/2011 to 8/27/2011. The rows are categorized into sales (Sls) and markdowns (MD) for both regular and clearance prices, along with gross margin (GM) percentages.

	all [Calendar]	Aug FY2011	7/30/2011	8/6/2011	8/13/2011	8/20/2011	8/27/2011
AP Cp Ttl Sls U	0	0	0	0	0	0	0
Wp Fcst Pre-Season U	0	0	0	0	0	0	0
Wp Ttl Sls U	8,866	1,583	317	317	317	317	317
Wp Sls Reg U	3,535	631	126	126	126	126	126
Wp Sls Promo U	4,361	779	156	156	156	156	156
Wp Sls Clr U	970	173	35	35	35	35	35
Regular Price	\$50.00	\$50.00	\$50.00	\$50.00	\$50.00	\$50.00	\$50.00
Wp Sls Reg R	176,750	31,563	6,313	6,313	6,313	6,313	6,313
Promo Price	\$39.73	\$39.73	\$39.73	\$39.73	\$39.73	\$39.73	\$39.73
Wp Sls Promo R	173,263	30,940	6,188	6,188	6,188	6,188	6,188
Clearance Price	\$16.50	\$16.50	\$16.50	\$16.50	\$16.50	\$16.50	\$16.50
Wp Sls Clr R	16,005	2,858	572	572	572	572	572
Wp Ttl Sls R	366,018	65,360	13,072	13,072	13,072	13,072	13,072
Wp Ttl Sls AUR	41.3	41.3	41.3	41.3	41.3	41.3	41.3
Wp Ttl Sls AUC	20.0	20.0	20.0	20.0	20.0	20.0	20.0
Wp Ttl Sls C	177,320	31,664	6,333	6,333	6,333	6,333	6,333
Regular Cost	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00
Clearance Cost	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00
Wp MD Promo R	44,804	7,394	27,110	10,300	10,300	0	0
Wp MD Clr R	53,346	0	0	0	0	0	0
Wp GM	179,026	11,017	53,352	103,002	20,270	24,923	23,206
Wp GM %	48.6 %	46.7 %	49.2 %	56.9 %	49.2 %	59.2 %	59.2 %

Promo Details View

This view displays the baseline sales and promotional lift units for the style/color. The baseline sales units measure, Wp Baseline Sales U, displays the number of units that would be sold if no promotions existed. The promotional lift units measure, Wp Promo Lift U, displays the number of additional units that would be sold with the promotion. The Wp Sls Promo U measure is the total units that would be sold. It combines the baseline sales units and the promotional lift units.

Figure 7–21 Promo Details View

	Wp Sls Promo Eligibility	Wp Promo Lift U	Wp Baseline Sales U	Wp Sls Promo U
all [Promotion]	☒	896	3,465	4,361
all [Calendar]	☒			
8/6/2011		0	0	0
8/13/2011		27	137	165
8/20/2011		24	121	145
8/27/2011		96	214	310
9/3/2011		92	368	460
9/10/2011		114	458	572
9/17/2011		151	604	755
9/24/2011		185	739	924
10/1/2011		206	824	1,030
10/8/2011		0	0	0
10/15/2011		0	0	0
10/22/2011		0	0	0

Figure 7–22 Promo Details View for Back to School Promotion

	Wp Sls Promo Eligibility	Back to School	Wp Baseline Sales U	Wp Sls Promo U
all [Promotion]	☒	896	3,465	4,361
all [Calendar]	☒			
8/6/2011		0	0	0
8/13/2011		27	137	165
8/20/2011		24	121	145
8/27/2011		96	214	310
9/3/2011		92	368	460
9/10/2011		114	458	572
9/17/2011		151	604	755
9/24/2011		185	739	924
10/1/2011		206	824	1,030
10/8/2011		0	0	0
10/15/2011		0	0	0
10/22/2011		0	0	0

Figure 7–23 Promo Details View for Fall Sales Promotion

	Wp Sls Promo Eligibility	Wp Promo Lift U	Wp Baseline Sales U	Wp Sls Promo U
all [Calendar]	☒	896	3,465	4,361
8/6/2011		0	0	0
8/13/2011		27	137	165
8/20/2011		24	121	145
8/27/2011		96	214	310
9/3/2011		92	368	460
9/10/2011		114	458	572
9/17/2011		151	604	755
9/24/2011		185	739	924
10/1/2011		206	824	1,030
10/8/2011		0	0	0
10/15/2011		0	0	0

Table 7–8 Promo Details View Measures

Measure	Description
Wp Sls Promo Eligibility	By selecting this boolean, the promotion is being associated to the style/color. You must seed from parameters to apply the promotional details to their style/color plan after selecting this boolean.
Wp Promo Lift U	Displays the number of additional units sold with the promotion.
Wp Baseline Sales U	Displays the number of units sold if no promotions existed.
Wp Sls Promo U	Displays the total units sold. This measure combines the baseline sales units and the promotional lift units.

Once you are satisfied with the sales plan, return to the [Item Plan Parameters View: Receipt Parameters Measure Profile](#) to create the receipt and inventory plan.

Manage Item Plans and Promotional Lifts Task: Receipt and Inventory Plan

After you have developed the receipt flow, review the receipt and inventory plan in the Item Plan view.

Item Plan View: Receipts and Inventory Measure Profile

Use this view to review the receipt and inventory plan you created in the Item Plan Parameters view.

1. Change the measure profile of the Item Plan view to **Receipts and Inventory**.
2. Review the receipt units in the Wp Receipt U measure.

Figure 7–24 Item Plan View: Receipts and Inventory Measure Profile

Item Plan

LocationProduct

Brick & MortarACME LEATHER JACKET/BLACK

CalendarMeasure

Find...

<

3. Return to the **Sales and Margin Plan** measure profile.
4. Review the gross margin in the Sales and Margin Plan measure profile. The margin measures are populated now that the receipt markup has been planned.

Figure 7–25 Item Plan View: Sales and Margin Plan Measure Profile

	all [Calendar]	> Jun FY2011	> Jul FY2011	> Aug FY2011	> Sep FY2011	> Oct FY2011
AP Cp Ttl Sls U	0	0	0	0	0	0
Wp Fcst Pre-Season U	0	0	0	0	0	0
Wp Ttl Sls U	9,183	620	2,711	3,825	1,025	415
Wp Sls Reg U	3,693	0	0	2,795	740	0
Wp Sls Promo U	4,519	620	2,711	1,030	0	0
Wp Sls Clr U	970	0	0	0	285	415
Regular Price	\$50.00	\$50.00	\$50.00	\$50.00	\$50.00	\$50.00
Wp Sls Reg R	176,750	0	0	139,750	37,000	0
Promo Price	\$39.97	\$39.27	\$40.00	\$40.00	\$40.00	\$40.00
Wp Sls Promo R	173,987	24,347	108,440	41,200	0	0
Clearance Price	\$24.71	\$0.00	\$0.00	\$0.00	\$30.00	\$18.75
Wp Sls Clr R	22,913	0	0	0	8,550	7,781
Wp Ttl Sls R	373,650	24,347	108,440	180,950	45,550	7,781
Wp Ttl Sls AUR	40.7	39.3	40.0	47.3	44.4	18.8
Wp Ttl Sls AUC	20.0	20.0	20.0	20.0	20.0	20.0
Wp Ttl Sls C	183,653	12,400	54,220	76,500	20,500	8,300
Regular Cost	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00
Clearance Cost	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00
Wp MD Promo R	2,060	0	0	2,060	0	0
Wp MD Clr R	0	0	0	0	0	0
Wp GM	223,366	14,608	65,064	107,746	27,330	4,669
Wp GM %	59.8 %	60.0 %	60.0 %	59.5 %	60.0 %	60.0 %

If you are satisfied with the receipts and inventory plan, continue to the [Review and Approve Item Plans Step](#). If not, return to the [Item Plan Parameters View: Receipt Parameters Measure Profile](#) to adjust the plan.

Review and Approve Item Plans Step

After you have developed the sales and margin and receipts and inventory plans, compare them to the plans created in the Merchandise Financial Planning (MFP) application. Once you have reviewed the plans, approve them in the Plan Approval view.

This step contains three views: [Plan Review View](#), [All Measures View](#), and [Review and Approve Item Plans View](#).

Plan Review View

Use this view to compare the plan to the plans created in MFP. Several measure profiles are available for comparison:

- Compare to MFP Cost Cp Plan
- Compare to MFP Cost Op Plan
- Compare to MFP Retail Cp Plan
- Compare to MFP Retail Op Plan
- Compare to MFP Unit Plan

Figure 7–26 Plan Review Step: Compare to MFP Cost Cp Plan

	all [Calendar]	> Jun FY2011	> Jul FY2011	> Aug FY2011	> Sep FY2011	> Oct FY2011
Wp Ttl Sls R	368,726	23,606	108,440	180,950	45,550	8,040
Wp Sales Net VAT R	368,726	23,606	108,440	180,950	45,550	8,040
MFP Cp Sales Net VAT R	0	0	0	0	0	0
Wp Sales Net VAT var MFP Cp R %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
Wp Gross Profit	191,406	11,206	54,220	104,450	25,050	-260
MFP Cp Gross Profit	0	0	0	0	0	0
Wp Gross Profit var MFP Cp R %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
Wp Gross Profit %	51.9 %	47.5 %	50.0 %	57.7 %	55.0 %	-3.2 %
MFP Cp Gross Profit %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
Wp Receipts C	189,080	65,540	74,260	43,860	5,420	0
MFP Cp Receipts C	0	0	0	0	0	0
Wp EOP Inv C	0	52,912	71,868	37,698	22,208	13,742
MFP Cp EOP Inv C	0	0	0	0	0	0
Wp Cum Avg Inv C	31,929	34,876	45,477	46,625	42,407	37,721
MFP Cp Cum Avg Inv C	0	0	0	0	0	0
Wp Cum Turn C	5.6	0.4	1.5	3.1	3.9	4.6
MFP Cp Cum Turn C	0	0	0	0	0	0

Review and Approve Item Plans View

After you have reviewed the plans, approve them in this view.

The approval process is self-approved and executed by the item planner. The versions to be updated are determined during the approval process. During preseason, it is recommended that Op and Cp are updated together to ensure synchronization. When in-season planning begins, only the Cp version is updated. If for some reason the Op needs to be updated after in-season planning has begun, you have the option to approve to the Op version only. Note that in this case, only unelapsed time periods are approved from Wp to Op.

By default, all quarters are disabled for Op approval. If the administrator allows users to approve to Op, you can approve the Op.

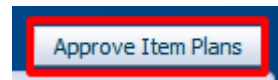
To approve the plans, perform the following steps:

1. Use the Wp Approve measure to approve the plan. You can approve just the current plan, just the original plan, or both plans.
2. Optional: Enter comments in the the Wp Approval Comments measure.

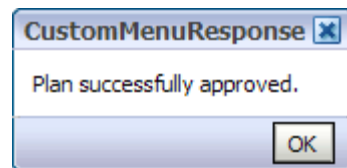
Figure 7–27 Plan Approval View

	Q2 FY2011	Q3 FY2011	Q4 FY2011
Wp Approve	Approve Op and Cp	Approve Op and Cp	Approve Op and Cp
Wp Last Approval Action			
Wp Approval Comments	Rec-d by BLG	Rec-d by BLG	Rec-d by BLG
Op Last Approved Date			
Op Last Approved By			
Op Last Approved Comments			
Cp Last Approved Date			
Cp Last Approved By			
Cp Last Approved Comments			

- When ready to approve, click **Approve Item Plans** in the upper right corner [Figure 7–28](#).

Figure 7–28 Approve Item Plans Button

- A success message appears, informing you that the plan was successfully approved. Click **OK** to close it.

Figure 7–29 Plan Approved Message

The view refreshes and the Wp Approve and Wp Approval Comments measures are cleared. The Wp Last Approval Action measure along with the associated Op and Cp measures are populated ([Figure 7–30](#)).

Figure 7-30 Approved Plans

The screenshot shows a 'Plan Approval' window with a toolbar and a data table. The toolbar includes buttons for Location, Product, Find..., and Calendar/Measure. The data table has columns for Q2 FY2011, Q3 FY2011, and Q4 FY2011. The rows show approval actions, dates, and comments for both Original Plan (Op) and Current Plan (Cp).

	Q2 FY2011	Q3 FY2011	Q4 FY2011
Wp Approve			
Wp Last Approval Action	Approve Op and Cp	Approve Op and Cp	Approve Op and Cp
Wp Approval Comments			
Op Last Approved Date	6/26/2011	6/26/2011	6/26/2011
Op Last Approved By	andy	andy	andy
Op Last Approved Comments	Rec-d by BLG	Rec-d by BLG	Rec-d by BLG
Cp Last Approved Date	6/26/2011	6/26/2011	6/26/2011
Cp Last Approved By	andy	andy	andy
Cp Last Approved Comments	Rec-d by BLG	Rec-d by BLG	Rec-d by BLG

Table 7-9 lists the measures available on this view.

Table 7-9 Approval Step Measures

Measure	Description
Wp Approve	Use this measure to approve the plan to the current plan, original plan, or both.
Wp Last Approval Action	Displays the last type of approval for the time period. The choices are Approve Op and Cp, Approve Op Only, and Approve Cp Only.
Wp Approval Comments	Use this measure to enter comments about the plan.
Op Last Approved Date	The date that the last original plan was approved.
Op Last Approved By	The username of the person who last approved the original plan.
Op Last Approved Comments	The comments about the original plan approval made by the user.
Cp Last Approved Date	The date that the last current plan was approved.
Cp Last Approved By	The username of the person who last approved the current plan.
Cp Last Approved Comments	The comments about the current plan approval made by the user.

Committing Targets

When you are ready to share your plan with other users, you should commit your workbook to the domain. This shares your plan with others. For more information about committing, see the *Oracle Retail Predictive Application Server User Guide for the Fusion Client*.

To commit your plan, perform the following steps:

1. Approve your plans using the instructions in [Review and Approve Item Plans View](#) section.
2. In the workbook that you have published the targets, click **Commit** in the toolbar. Or, from the File menu, select the **Commit** option.

Once the commit has occurred, the commit status changes to committed.

All Measures View

The All Measures view contains all the measures in the workbook; however, only the Wp Ttl Sls U measure is visible in the default measure profile. The purpose of this view is to allow you to create a view of workbook measures that you may not be able to view all at once in other views.

Figure 7–31 All Measures View

	all [Calendar]	Jul FY2011	Aug FY2011	Sep FY2011	Oct FY2011	Nov FY2011	Dec FY2011
Wp Ttl Sls U	8,866	620	2,711	3,825	1,025	415	270

To see the other measures in this view, perform the following steps:

1. Click the **Measure** dimension tile. The All Measures - Measure window appears.
2. Click the **Show/Hide** tab.
3. Move measures you want to see in the view from the Hidden Measures box to the Visible Measures box.
4. When finished, click **OK**.

For more information about hidden and visible measures, see the *Oracle Retail Predictive Application Server User Guide for the Fusion Client*.

Review and Accept Price Plans

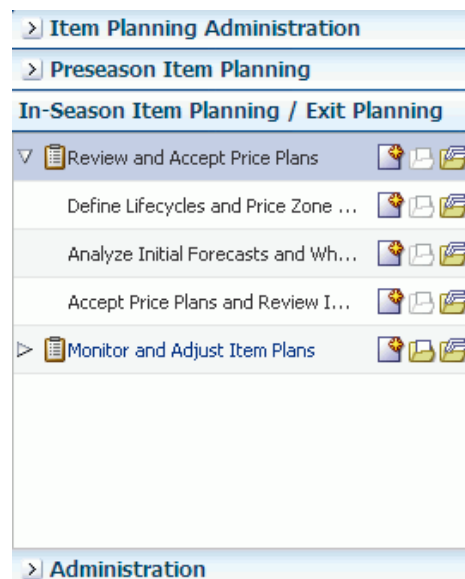
Use the Review and Accept Price Plans task during in-season planning to create a new price plan using COE forecasts and what-if calls. This price plan can then be seeded into the associated Wp measures in the [Monitor and Adjust Item Plans](#) task.

The Review and Accept Price Plans Task has three steps:

- [Define Lifecycles and Price Zone Contribution Step](#)
- [Analyze Initial Forecasts and What-if Forecasts Step](#)
- [Accept Price Plans and Review Impact Step](#)

This task and steps are shown in [Figure 8–1](#).

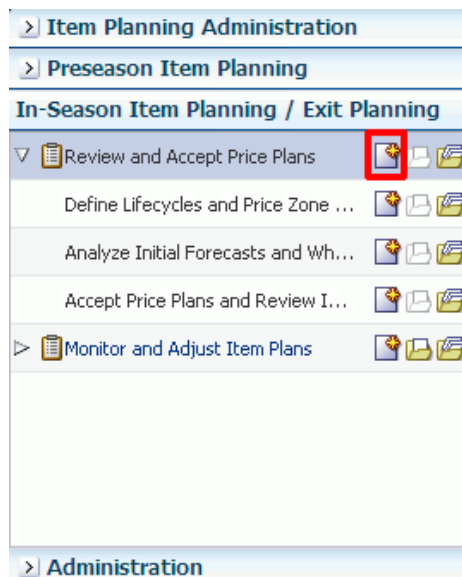
Figure 8–1 *Review and Accept Price Plans Task*



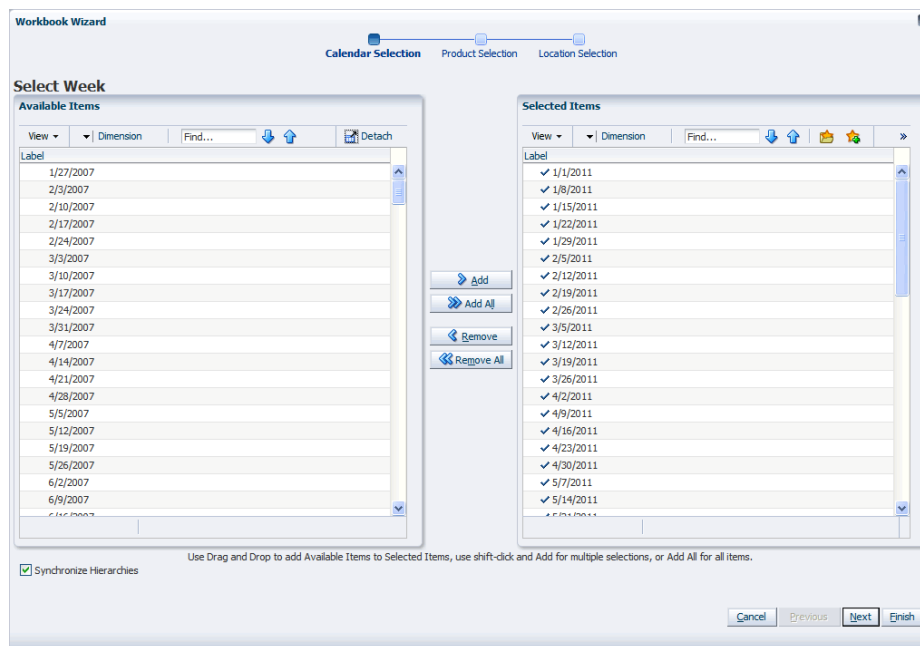
Building the Review and Accept Price Plans Workbook

To build the Review and Accept Price Plans workbook, perform the following steps:

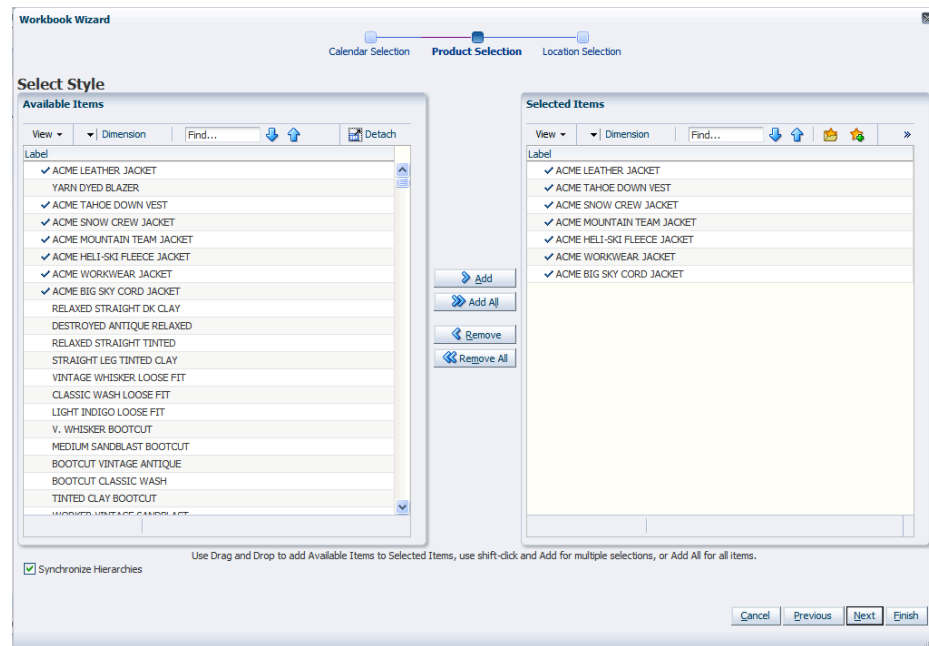
1. Click the **Create New Workbook** icon in the Review and Accept Price Plans task.

Figure 8–2 Create New Workbook Icon

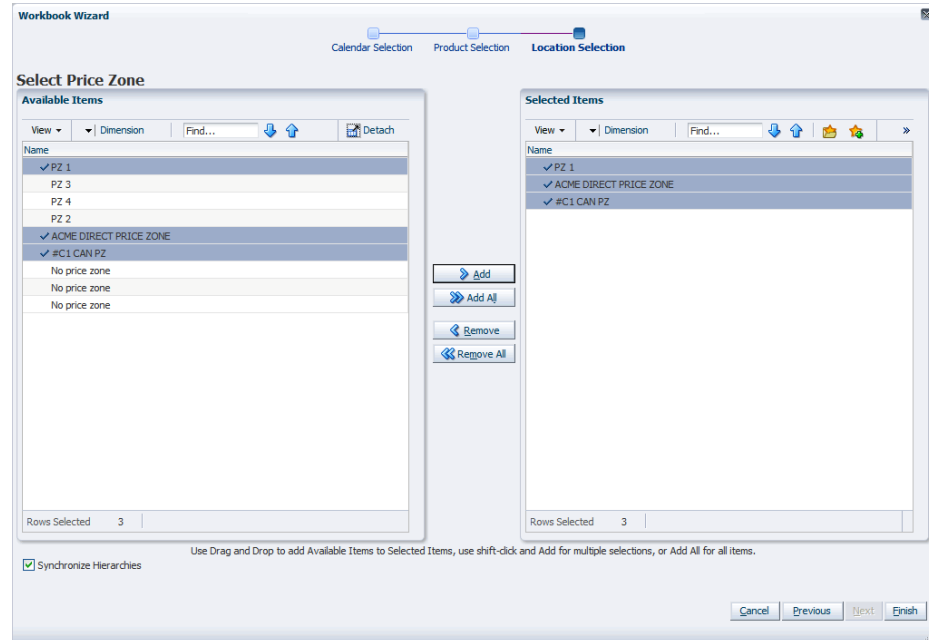
2. The workbook wizard opens at the Calendar Selection step. Select the weeks that you want to plan and move them to the Selected Items box. Click **Next**.

Figure 8–3 Workbook Wizard: Calendar Selection

3. The Product Selection step of the workbook wizard appears. Select the styles you want to plan and move them to the Selected Items box. Click **Next**.

Figure 8–4 Workbook Wizard: Product Selection

4. The Prize Zone Selection step of the workbook wizard appears. Select the prize zones you want to plan and move them to the Selected Items box. Click **Finish**.

Figure 8–5 Workbook Wizard: Prize Zone Selection

The Review and Accept Price Plans workbook is built.

Define Lifecycles and Price Zone Contribution Step

Use the views in this step to review the lifecycle of the style/color as it was setup in the [Develop and Approve Item Plans](#) activity.

The Define Lifecycles and Price Zone Contribution Step contains two views:

Lifecycle Summary View

Use this view to review the lifecycle of the style/color that was set up in the [Develop and Approve Item Plans](#) task. This view is read-only.

Figure 8–6 Lifecycle Summary View

Measure	Value
Start Sell Week	7/3/2010
Out of Stock Week	12/25/2010
Weeks on Sale (Reg + Promo)	15
Wp Number of Weeks - Clearance Price	11
Wp Number of Weeks - Total Life	26
Wp Exit Strategy Start Week	10/9/2010

Table 8–1 Lifecycle Summary View Measures

Measure	Description
Start Sell Week	The first week the style/color is sold.
Out of Stock Week	The planned week that the style/color is out of stock.
Weeks on Sale (Reg + Promo)	The combined number of weeks the style/color is on sale at the regular and promotional price.
Wp Number of Weeks - Clearance Price	The number of weeks that the style/color is on sale at clearance price.
Wp Number of Weeks - Total Life	The total number of weeks of the style/color's entire lifecycle. This is the sum of the regular, promotional, and clearance weeks.
Wp Exit Strategy Start Week	The first week that the style/color inventory and sales are moved from regular to clearance.

After you have reviewed the lifecycle, continue to the [Spread to Price Zone View](#).

Spread to Price Zone View

Use this view to spread the item plan's sales from the channel level to the price zone level. This is done by choosing a spread method and setting the price zone contribution.

Figure 8–7 Spread to Price Zone View

	Brick & Mortar	ACME CANADA	#C1 CAN PZ	ACME DIRECT	ACME DIRECT PRICE ZONE
Spread Source	Store Cou				
System Recommended Contribution	6.3 %	6.3 %	0.2 %	0.2 %	
Wp Price Zone Contributions	0.0 %	0.0 %	0.0 %	0.0 %	

To set the spread method, perform the following steps:

1. In the Spread Source measure, select a spread method. There are three options:
 - **Store Count:** Spreads the sales according to the number of stores in each price zone.
 - **COE Initial Forecast:** Spreads by the initial forecast sales units that the COE engine creates. These forecasts, which are at the price zone level, are sent in a batch process from COE.
 - **What If Forecast:** Spreads according to the COE forecast that you revise in the [What If Request View](#).
2. Click **Calculate**. The data in the System Recommended Contribution measure is updated to reflect the relevant recommendations for the spread method.
3. In the Wp Price Zone Contributions measure, enter the spread percentages for each price zone. Use the data in the System Recommended Contribution measure as a guideline. The percentages you enter are used to spread the channel level plan down to the price zone level.

Table 8–2 Spread to Price Zone View Measures

Measure	Description
Spread Source	Select the spread method to use. Options are Store Count, COE Initial Forecast, and What If forecast.
System Recommended Contribution	The system recommended contribution for the spread method. Use this data as a guideline.
Wp Price Zone Contributions	Enter the spread percentages for each prize zone. The sales are spread to the price zones according to these percentages.

When finished, continue to the [Analyze Initial Forecasts and What-if Forecasts Step](#).

Analyze Initial Forecasts and What-if Forecasts Step

Use the views in this step to create and review what-if forecasts. There are five views to help you do this:

- [Forecast Analysis \(Style-Color/Price Zone\) View](#)
- [What If Request View](#)

- [Forecast Analysis \(Style-Color/Price Zone/Week\) View](#)
- [Markdown Impact Dashboard View](#)
- [Markdown Analysis Graph View](#)

Forecast Analysis (Style-Color/Price Zone) View

Use this view to review the COE initial forecast and the what-if forecasts you create in this step. Use the three measure profiles provided in this view to review this high level information:

- **Initial Forecast:** Displays the initial forecast from the COE engine. This forecast is generated automatically by the Clearance Optimization Engine based on the actual sell through, compared to the target sell through and exit dates. This forecast is loaded into IP COE in the batch process. This is the default measure profile (shown in [Table 8–3](#)).
- **What-If Forecast:** Displays the forecast you create in the [What If Request View](#). The what-if forecast is the COE response to your what-if request, based on your markdown cadence.
- **Initial and What-If Forecast:** Displays both the COE initial forecast and the what-if forecast.

After you have reviewed the forecast data, continue to the [What If Request View](#) to create and review what-if forecasts.

Figure 8–8 Forecast Analysis (Style-Color/Price Zone) View - Initial Forecast Measure Profile

	#C1 CAN PZ	ACME DIRECT PRICE ZONE	PZ 1	PZ 2	PZ 3	PZ 4
COE Initial EOL Exit Week						
COE Initial EOL Sell Thru %	80.0 %	80.0 %	80.0 %	80.0 %	80.0 %	80.0 %
COE Initial EOL Salvage Value % Off	90.0 %	90.0 %	90.0 %	90.0 %	90.0 %	90.0 %
COE Initial EOL Salvage Value Price	150	150	150	150	150	150
COE Forecasted Clearance Markdown Retail Price Effective Date	W40_2010	W40_2010	W40_2010	W40_2010	W40_2010	W40_2010
COE Forecasted Opportunity Cost	876	876	876	876	876	876
COE Forecasted Exit Week Sell Thru%						
COE Forecasted EOL EOP Inv U at Forecasted Exit Week	0	0	0	0	0	0
COE Forecasted GM Initial Exit Week	0	0	0	0	0	0
COE Forecasted GM % Forecasted Exit Week	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Clearance Optimization Action Note	Do Nothing	Do Nothing	Do Nothing	Do Nothing	Do Nothing	Do Nothing

[Table 8–3](#) lists the measures in this view.

Table 8–3 Forecast Analysis (Style-Color/Price Zone) View Measures

Measure	Description
COE Initial EOL Exit Week	The Exit Date COE uses to calculate the Recommended Clearance Markdown. This measure is a single hierarchy selection that displays the week ending date of the exit week.
COE Initial EOL Sell Thru %	The Recommended Sell Thru % used by COE to determine the optimal Recommended Clearance Markdown Price Plan that achieves the desired Sell Thru %.
COE Initial EOL Salvage Value % Off	The percent off the Current Ticketed Retail Price that is used to determine the Salvage Value Price for any remaining inventory at the Exit Date.

Table 8–3 (Cont.) Forecast Analysis (Style-Color/Price Zone) View Measures

Measure	Description
COE Initial EOL Salvage Value Price	The Salvage Value Price applied to any remaining inventory at the end of the Exit Date.
COE Forecasted Clearance Markdown Retail Price Effective Date	The Effective week of the COE Recommended Clearance Markdown Ticketed Retail Price.
COE Forecasted Opportunity Cost	The dollar amount you can generate in profit by taking the recommended markdowns.
COE Forecasted Exit Week Sell Thru %	The Forecasted week that the Targeted Sell Thru % is achieved.
COE Forecasted EOL EOP Inv U at Forecasted Exit Week	The Forecasted EOP Inv Units in the Forecasted Exit Week.
COE Forecasted GM Initial Exit Week	The cumulative Forecasted Gross Margin value at the Forecasted Exit Week. This is calculated for each time period based on the COE Recommended Clearance Markdown Retail Price and the Product Cost Price.
COE Forecasted GM % Forecasted Exit Week	The cumulative Forecasted Gross Margin Value at the Forecasted Exit Week (Date) expressed as a percentage of the COE Forecasted Sales Retail Value.
Clearance Optimization Action Note	Notation for the type of Clearance Optimization What-If action that has been initiated.

What If Request View

Use this view to create different what-if calls by trying different combinations of clearance prices, price ladders, markdown weeks, and so on.

Note: Price ladders, which define a set of markdown prices, are created within the Clearance Optimization Engine (COE) application.

Because price ladders are created in COE, you can only select a price ladder to use within Item Planning. To edit it, you must return to COE.

For more information about the creation of price ladders, see the "Price Ladders Standard Interface" section and the "Price Ladders Standard Interface Specification" table in Chapter 2 of the *Oracle Retail Clearance Optimization Engine Operations Guide*.

Figure 8–9 What If Request View

	#C1 CAN PZ	ACME DIRECT PRICE	PZ 1	PZ 2	PZ 3
COE What-If Clearance Retail Price	0	0	0	0	
COE What-If Clearance Retail Price % Off	70.0 %	70.0 %	70.0 %	70.0 %	75.0 %
COE What-If Price Ladder ID	PP-PERM - PERM MD	PP-PERM - PERM MD	PP-PERM - PERM MD	PP-PERM - PERM MD	PP-PERM - PERM MD
COE What-If Price Type	PPT	PPT	PPT	PPT	PPT
COE What-If Markdown Week	7/30/2011	7/30/2011	7/30/2011	7/30/2011	
COE What-If EOL Exit Week	8/13/2011	8/13/2011	8/13/2011	8/13/2011	
COE What-If EOL Sell Thru %	90.0 %	90.0 %	90.0 %	90.0 %	0.0 %
COE What-If EOL Salvage Value % Off	20.0 %	20.0 %	20.0 %	20.0 %	0.0 %
COE What-If EOL Salvage Value Price	120	120	120	120	
COE What-If Current Inventory U	1,500	1,500	1,500	1,500	
Initiate COE Optimization What-If Call	☒	☒	☒	☒	
COE What-If Call Date	6/30/2011	6/30/2011	6/30/2011	6/30/2011	
COE Last What-If Call Comments					
COE What-If Service Call Information					

To create a what if forecast, perform the following steps:

1. In the COE What-If Price Ladder ID measure, select the price ladder to apply to the style/color. These price ladders were created in COE.
2. Upon a calc, the COE What-If Price Type measure will auto-update to the correct type based on the Ladder ID, depending on if the Ladder ID is a percent-off ("Percent Off") or a Price Point ("PPT").
3. Enter the remaining what-if data.
4. In the Initiate COE Optimization What-If Call measure, select the check box.
5. Click the **What-If Markdown Call** button in the upper right corner.

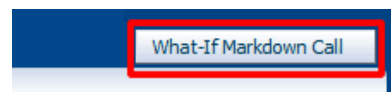
Figure 8–10 What-If Markdown Call Button

Table 8–4 lists the measures in this view.

Table 8–4 What If Request View Measures

Measure	Description
COE What-If Clearance Retail Price	User-selected revised Clearance Price to be used during the What-If COE Optimization Service Call.
COE What-If Clearance Retail Price % Off	User-selected revised Clearance Price percent off the Current Ticketed Retail Price.
COE What-If Price Ladder ID	User-selected Price Ladder used for validation within COE.
COE What-If Price Type	Auto-selected Price Type (either Price Point "PPT" or Percent Off).
COE What-If Markdown Week	User-selected week in which the What-If Price will be applied to be used during the What-If COE Optimization Service Call.
COE What-If EOL Exit Week	User-selected revised EOL Exit Week to be used during the What-If COE Optimization Service Call.

Table 8–4 (Cont.) What If Request View Measures

Measure	Description
OE What-If EOL Sell Thru %	User-selected revised EOL Sell Thru% to be used during the What-If COE Optimization Service Call.
CCOE What-If EOL Salvage Value % Off	User-selected revised Salvage Value % Off the Current Ticketed Price to be used during the What-If COE Optimization Service Call.
COE What-If EOL Salvage Value Price	The revised Salvage Value Price based on the What-If Clearance Salvage Value % Off and the Current Ticketed Price.
COE What-If Current Inventory U	User-selected Current Inventory Units to be used during the What-If COE Optimization Service Call.
Initiate COE Optimization What-If Call	Selecting this measure indicates that a What-If Call should be invoked from the What-If Markdown Call custom menu option.
Last What-If Call Date	Date of the last What-If Call.
Last What-If Call Comments	Text measure for user comments associated with the last What-If Call.
COE What-If Service Call Information	Text measure that contains error information passed from the COE service call.

To see the what-if forecast at the week level, continue to the [Forecast Analysis \(Style-Color/Price Zone/Week\) View](#). To see the forecast at the style-color/price zone level, return to the [Forecast Analysis \(Style-Color/Price Zone\) View](#).

Forecast Analysis (Style-Color/Price Zone/Week) View

Use this view to review a detailed view of the initial forecast and the what-if forecast you created in the [What If Request View](#). Use the three measure profiles provided in this view to review this information:

- **Initial Forecast:** Displays the initial forecast from the COE engine. This forecast is loaded into IP COE in the batch process. This is the default measure profile.
- **Initial and What-If Forecast:** Displays both the COE initial forecast and the what-if forecast.
- **What-If Forecast:** Displays the forecast you create in the [What If Request View](#) (shown in [Table 8–5](#)).

Figure 8–11 Forecast Analysis (Style-Color/Price Zone/Week) View - What-If Forecast Measure Profile

	1/1/2011	1/8/2011	1/15/2011	1/22/2011	1/29/2011	2/5/2011
Wp Original Ticketed Retail Price	150	150	150	150	150	150
Wp Product Cost Price	20	20	20	20	20	20
Wp Current Ticketed Retail Price	150	150	150	150	150	150
COE Recommended Clearance Markdown R	0	0	0	0	0	10,258
COE Revised Price Type						
COE Revised Clearance Retail Price	0	45	0	0	0	0
COE Revised Clearance Retail Price % Off	54.7 %	70.0 %	70.0 %	54.7 %	70.0 %	70.0 %
COE Revised Price % Off Original Price	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
COE Revised Clearance Markdown R	0	0	0	0	0	0
COE Revised Salvage Value Markdown R	0	0	0	0	0	0
COE Revised Clearance Markdown Retail Price Plan	68	45	45	68	45	45
COE Revised Forecasted Sales U	21	42	40	21	34	35
COE Revised Forecasted Sales R	1,428	1,888	1,798	1,428	1,528	1,573
COE Revised Sales AUR	68	47	45	68	45	45
COE Revised Forecasted GM Revised Exit Week	1,008	1,047	997	1,008	848	873
COE Revised Forecasted GM % Revised Exit Week	70.6 %	55.5 %	55.5 %	70.6 %	55.5 %	55.5 %

Table 8–5 Forecast Analysis (Style-Color/Price Zone/Week) View - What-If Forecast Measure Profile Measures

Measure	Description
Wp Original Ticketed Retail Price	The Original Ticketed Retail Price at the time when the product was first set-up in the Item Master files.
Wp Product Cost Price	The Cost Price of the product.
Wp Current Ticketed Retail Price	The Current Ticketed Retail Price for the product at the end of the last period / beginning of the current time period.
COE Forecasted Clearance Markdown Retail Price	The COE Optimized Recommended Clearance Markdown Ticketed Retail Price.
COE Revised Price Type	Text measure that will contain the price type value returned from the COE service call.
COE Revised Clearance Retail Price	Revised Clearance Price validated against the COE Price Ladders and used during the What-If COE Optimization Service Call.
COE Revised Clearance Retail Price % Off	Revised Clearance Price percent off the Current Ticketed Retail Price.
COE Revised Price % Off	Original Price Measure that will hold the value returned by the COE service call.
COE Revised Clearance Markdown R	The extended Retail Value of the COE Clearance Markdown based on the COE Revised Clearance Markdown Price and the Beginning of Period Inventory Units in the effective week of the Clearance Markdown.
COE Revised Salvage Value Markdown R	The extended Retail Value of the Salvage Markdown.

Table 8–5 (Cont.) Forecast Analysis (Style-Color/Price Zone/Week) View - What-If Forecast Measure Profile Measures

Measure	Description
COE Revised Clearance Markdown Retail Price Plan	The COE Optimized Revised Clearance Markdown Ticketed Retail Price Plan following a What-If COE Optimization Service Call.
COE Revised Forecasted Sales U	Units in unelapsed time periods combined with Actual Sales Units in elapsed time periods.
COE Revised Forecasted Sales R	The extended Retail Value of the COE Forecasted Sales Units.
COE Revised Sales AUR	The Revised Sales AUR following a What-if COE Optimization Service Call.
COE Revised Forecasted GM Revised Exit Week	The Forecasted Periodic Gross Margin value at the Targeted Exit Date. Calculated for each time period based on the COE Revised Clearance Markdown Retail Price and the Product Cost Price.
COE Revised Forecasted GM % Revised Exit Week	The Forecasted Periodic Gross Margin Value at the Targeted Exit Date expressed as a Percentage of the COE Forecasted Sales Retail Value.

After you have reviewed the what-if forecast, continue to the [Markdown Impact Dashboard View](#) to see the key performance indicators that were created in the Merchandise Financial Planning application.

Markdown Impact Dashboard View

Use this view to review the markdown budget created in the Merchandise Financial Planning (MFP) application. This budget is at the subclass level. The key performance indicators of the budget are provided to help you understand the total budget for the subclass and to enable you to compare it to the price plan you create in this task.

Use the measure details to compare the actual plan to the working plan, initial forecast, and revised forecast.

Figure 8–12 Markdown Impact Dashboard View

	02. Total Act/Proj	03. Total Act/Plan diff	04. Total Act/Proj var to Total Plan	05. Total Act/Initial Optimization	06. Total Act/Initial Opt Fcst	07. Total Act/Tr
MFP Total Sales Retail	100650.00	100650.00	-1.00	169234.38	169234.38	
Sales Retail	0.00	0.00	0.00	120252.96	120252.96	
MFP Total Markdowns Retail	31325.49	31325.49	-1.00	157901.11	157901.11	
Markdowns	31325.49	31325.49	0.00	100122.53	100122.53	
Gross Margin	379719.64	379719.64	379719.64	389773.06	389773.06	
Gross Margin %	0.0 %	0.0 %	0.0 %	324.1 %	324.1 %	
Sell Thru %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	
EOL Inventory Retail	0.00	0.00	0.00	0.00	0.00	

Table 8–6 and Table 8–7 describe the measures in this view.

Table 8–6 Markdown Impact Analysis Dashboard View Measures

Measure	Description
MFP Total Sales Retail	This is a Key Performance Indicator that contains the MFP Total Sales Retail for the measure details on this view. The measure details are shown in Table 8–7.

Table 8–6 (Cont.) Markdown Impact Analysis Dashboard View Measures

Measure	Description
Sales Retail	This is a Key Performance Indicator that contains the Sales Retail for the measure details on this view. The measure details are shown in Table 8–7 .
MFP Total Markdowns Retail	This is a Key Performance Indicator that contains the MFP Total Markdowns Retail for the measure details on this view. The measure details are shown in Table 8–7 .
Markdowns	This is a Key Performance Indicator that contains the Markdowns for the measure details on this view. The measure details are shown in Table 8–7 .
Gross Margin	This is a Key Performance Indicator that contains the Gross Margin for the measure details on this view. The measure details are shown in Table 8–7 .
Gross Margin %	This is a Key Performance Indicator that contains the Gross Margin % for the measure details on this view. The measure details are shown in Table 8–7 .
Sell Thru %	This is a Key Performance Indicator that contains the Sell Thru % for the measure details on this view. The measure details are shown in Table 8–7 .
EOL Inventory Retail	This is a Key Performance Indicator that contains the EOL Inventory Retail for the measure details on this view. The measure details are shown in Table 8–7 .

Table 8–7 Markdown Impact Analysis Dashboard View Measure Details

Measure	Description
Total Plan	Original Plan for all time periods until EOL.
Total Act / Proj	Actual data in all elapsed time periods and Current Plan Projection for all unelapsed time periods until EOL.
Total Act/Proj diff to Total Plan	The difference between the Actual-Projections and the Original Plan.
Total Act/Proj var to Total Plan	The difference between the Actual-Projections and the Original Plan expressed as a percentage variance to the Original Plan.
Total Act / Initial Optimization Forecast	Actual data in all elapsed time periods and Initial Optimized Forecast for all unelapsed time periods until EOL.
Total Act/Initial Opt Fcst diff to Total Plan	The difference between the Actual-Initial Optimized Forecast and the Original Plan.
Total Act/Initial Opt Fcst var to Total Plan	The difference between the Actual-Initial Optimized Forecast and the Original Plan expressed as a percentage variance to the Original Plan.
Total Act / Revised Optimization Forecast	Actual data in all elapsed time periods and Revised Optimized Forecast for all unelapsed time periods until EOL.
Total Act / Rev Opt Fcst diff to Total Plan	The difference between the Actual-Revised Optimized Forecast and the Original Plan.
Total Act/ Rev Opt Fcst var to Total Plan	The difference between the Actual-Revised Optimized Forecast and the Original Plan (Op) expressed as a percentage variance to the Op.

Once you have reviewed the markdown budget from MFP, continue to the [Markdown Analysis Graph View](#).

Markdown Analysis Graph View

Use this view to see the forecast analysis in the graph view. If you are not satisfied with the results, return to the [What If Request View](#) to adjust the what-if call.

Figure 8–13 *Markdown Analysis Graph View*



After you have created a what-if forecast you are satisfied with, continue to the [Accept Price Plans and Review Impact Step](#).

Accept Price Plans and Review Impact Step

Use the views in this step to roll the what-if forecast back to the channel level and seed it into the item plan.

This step has four views:

- [Markdown Analysis \(Style-Color/Price Zone/Week\) View](#)
- [Price Plan Acceptance View](#)
- [Markdown Analysis \(Style-Color/Channel/Week\) View](#)
- [All Measures View](#)

Begin with the [Markdown Analysis \(Style-Color/Price Zone/Week\) View](#).

Markdown Analysis (Style-Color/Price Zone/Week) View

Use this view to review all of the recommendations for each price zone. The purpose of this view is to compare the different recommendations and choose which one you want to use with each price zone in the [Price Plan Acceptance View](#).

Figure 8–14 Markdown Analysis (Style-Color/Price Zone/Week) View

	#C1 CAN PZ	ACME DIRECT PRICE ZONE	PZ 1
Wp Sales Reg Price Zone U	0	0	0
Wp Sales Clr Price Zone U	0	0	0
Wp Sales Promo Price Zone U	0	0	0
Wp Price Zone Ttl Sls U	0	0	0
Wp Sales Reg Price Zone R	0	0	0
Wp Sales Clr Price Zone R	0	0	0
Wp Sales Promo Price Zone R	0	0	0
Wp Price Zone Ttl Sls R	0	0	0
.			
COE Recommended Forecasted Sales Reg U	0	25	0
COE Recommended Forecasted Sales Clr U	0	971	0
COE Recommended Forecasted Sales U	0	996	0
COE Recommended Forecasted Sales Reg R	0	1,950	0
COE Recommended Forecasted Sales Clr R	0	32,105	0
COE Recommended Forecasted Sales R	0	34,055	0
.			
COE Revised Sales Reg U	0	0	0
COE Revised Sales Clr U	0	0	0
COE Revised Sales U	0	0	0
COE Revised Sales Reg R	0	0	0
COE Revised Sales Clr R	0	0	0
COE Revised Sales R	0	0	0
.			
Accepted Price Plan Sls Reg U	0	25	0
Accepted Price Plan Sls Clr U	0	971	0
Accepted Price Plan Sls Promo U	0	0	0
Accepted Price Plan Ttl Sls U	0	996	0
Wp Ttl Sls var Accepted U %	-1.00	-1.00	-1.00
Accepted Price Plan Sls Reg R	0	1,950	0
Accepted Price Plan Sls Clr R	0	32,105	0
Accepted Price Plan Sls Promo R	0	0	0
Accepted Price Plan Ttl Sls R	0	34,055	0
Wp Ttl Sls var Accepted R %	-1.00	-1.00	-1.00
Accepted Price Plan Gross Profit	0	34,055	0
Wp Gross Profit var Accepted R %	-1.00	-1.00	-1.00

Price Plan Acceptance View

Use this view to select the recommendation for each price zone. You can select different recommendations for each price zone.

Figure 8–15 Price Plan Acceptance View

	PZ 1	PZ 2	PZ 3	PZ 4
ACME HELI-SKI FLEECE JACKET/BLACK	Accept Initial Price Recomme...	Accept Revised Price Recomm...	Accept Revised Price Rec...	Accept Revised Price Recom...
ACME HELI-SKI FLEECE JACKET/RED	Do Nothing	Accept Initial Price Recommen...	Do Nothing	Accept Initial Price Recomme...
ACME LEATHER JACKET/BLACK	Accept Initial Price Recomme...	Accept Revised Price Recommen...	Accept Revised Price Rec...	Do Nothing
ACME MOUNTAIN TEAM JACKET/AVIATOR BLUE	Accept Revised Price Recomme...	Accept Initial Price Recommen...	Accept Revised Price Rec...	Accept Initial Price Recomme...
ACME MOUNTAIN TEAM JACKET/PUTTY	Do Nothing	Accept Revised Price Recommen...	Accept Initial Price Rec...	Do Nothing
ACME SNOW CREW JACKET/ACTIVE ORANGE	Accept Initial Price Recomme...	Do Nothing	Do Nothing	Accept Initial Price Recomme...
ACME SNOW CREW JACKET/OLYMPIC YELLOW	Do Nothing	Accept Revised Price Recommen...	Accept Initial Price Reco...	Do Nothing
ACME SNOW CREW JACKET/PLACID BLUE	Accept Revised Price Recomme...	Accept Revised Price Recommen...	Accept Initial Price Reco...	Accept Revised Price Recom...
ACME SNOW CREW JACKET/PUTTY	Do Nothing	Accept Initial Price Recommen...	Accept Initial Price Reco...	Do Nothing
ACME TAHOE DOWN VEST/AVIATOR BLUE	Accept Initial Price Recomme...	Do Nothing	Accept Initial Price Reco...	Accept Initial Price Recomme...
ACME TAHOE DOWN VEST/BLACK	Do Nothing	Accept Initial Price Recommen...	Accept Initial Price Reco...	Do Nothing
ACME TAHOE DOWN VEST/GREEN MOUNTAIN	Do Nothing	Accept Revised Price Recommen...	Do Nothing	Accept Initial Price Recomme...
ACME TAHOE DOWN VEST/KHAKI	Do Nothing	Accept Revised Price Recommen...	Do Nothing	Accept Initial Price Recomme...
ACME WORKWEAR JACKET/BROWN	Do Nothing	Do Nothing	Do Nothing	Do Nothing
ACME WORKWEAR JACKET/KHAKI	Do Nothing	Do Nothing	Do Nothing	Do Nothing

To assign recommendations to a price zone, perform the following steps:

1. Review the different recommendations for each price zone in the [Markdown Analysis \(Style-Color/Price Zone/Week\) View](#) and decide which recommendation you want to use for each price zone.
2. In this view, select recommendation you decide to use. There are three options:
 - **Do Nothing:** Uses the Wp sales spread from the channel plan as the price plan in this price zone.
 - **Accept Initial Price Recommendation:** Uses the unaltered recommendations from COE that were loaded through the batch process.
 - **Accept Revised Price Recommendation:** Uses the recommendation that you created in the [What If Request View](#).
3. After you have selected a recommendation for each price zone, select the **Accept Price Plan** button in the upper right corner.

Figure 8–16 Accept Price Plan Button



A success message appears, confirming that the recommendation has been assigned to the price zone.

Based on the decision for each price zone, the accepted price plan for each channel is computed by aggregating the corresponding sales measures.

After you have selected a recommendation for each price zone, continue to the [Markdown Analysis \(Style-Color/Channel/Week\) View](#) to review the price zones rolled into the channel level.

Markdown Analysis (Style-Color/Channel/Week) View

Use this view to compare the current working plan to the newly accepted price plan at the channel level.

Figure 8–17 Markdown Analysis (Style-Color/Channel/Week) View

	10	11/20/2010	11/27/2010	12/4/2010	12/11/2010	12/18/2010	12/25/2010
Wp Sls Reg U	0	0	0	0	0	0	0
Wp Sls Clr U	0	0	0	0	0	0	0
Wp Sls Promo U	0	0	0	0	0	0	0
Wp Ttl Sls U	0	0	0	0	0	0	0
Wp Sls Reg R	0	0	0	0	0	0	0
Wp Sls Clr R	0	0	0	0	0	0	0
Wp Sls Promo R	0	0	0	0	0	0	0
Wp Ttl Sls R	0	0	0	0	0	0	0
Wp Gross Profit	0	0	0	0	0	0	0
.							
COE Recommended Forecast Sales Reg U	0	0	0	0	0	0	0
COE Recommended Forecast Sales Clr U	98	113	119	111	161	118	135
COE Recommended Forecast Sales U	98	113	119	111	161	118	135
COE Recommended Forecast Sales Reg R	0	0	0	0	0	0	0
COE Recommended Forecast Sales Clr R	98	3,526	3,713	3,463	5,023	3,682	4,212
COE Recommended Forecast Sales R	98	3,526	3,713	3,463	5,023	3,682	4,212
.							
COE Revised Sales Reg U	0	0	0	0	0	0	0
COE Revised Sales Clr U	0	0	0	0	0	0	0
COE Revised Sales U	0	0	0	0	0	0	0
COE Revised Sales Reg R	0	0	0	0	0	0	0
COE Revised Sales Clr R	0	0	0	0	0	0	0
COE Revised Sales R	0	0	0	0	0	0	0
.							
Accepted Price Plan Sls Reg U	0	0	0	0	0	0	0
Accepted Price Plan Sls Clr U	98	113	119	111	161	118	135
Accepted Price Plan Sls Promo U	0	0	0	0	0	0	0
Accepted Price Plan Ttl Sls U	98	113	119	111	161	118	135
Wp Ttl Sls var Accepted U %	00	-1.00	-1.00	-1.00	-1.00	-1.00	-1.00
Accepted Price Plan Sls Reg R	0	0	0	0	0	0	0
Accepted Price Plan Sls Clr R	98	3,526	3,713	3,463	5,023	3,682	4,212
Accepted Price Plan Sls Promo R	0	0	0	0	0	0	0
Accepted Price Plan Ttl Sls R	98	3,526	3,713	3,463	5,023	3,682	4,212

All measures in the [Markdown Analysis \(Style-Color/Channel/Week\) View](#) are read-only. They are separated into groups:

- First group: Wp measures. These contain data from the item plan you created in the [Develop and Approve Item Plans](#).
- Second group: COE Recommended Forecast measures. These contain data from the initial forecast loaded in IP COE from COE.
- Third group: COE Revised Sales measures. These contain data of the revised forecast you created with the what-if call.
- Fourth group: Accepted Price Plan. These contain the data of the price plan you chose in the [Price Plan Acceptance View](#).

Review these groups to confirm that the accepted price plan you have chosen is the best choice. Then, you continue to the [Monitor and Adjust Item Plans](#) task to seed the item plan with this new accepted price plan. By seeding with the accepted price plan, you are seeding the updated clearance price and regular units. The regular price should remain the same as it was in the preseason.

All Measures View

The All Measures view contains all the measures contained in the workbook; however, only the Wp Sls U measure is visible in the default measure profile. The purpose of this workbook is to allow you to create a view of workbook measures that you may not be able to view all at once in other views.

Figure 8–18 All Measures

	all [Calendar]	Jul FY2011	Aug FY2011	Sep FY2011	Oct FY2011	Nov FY2011	Dec FY2011
Wp Ttl Sls U	8,866	620	2,711	3,825	1,025	415	270

Next Steps

Continue to the [Monitor and Adjust Item Plans](#) task to seed the item plan with the new price plan you have created in this task. To do this, select Accepted Price Plan as the seed source in the [Seed View](#). The working plan measures of the selected style/colors are updated based on the planned sales units (regular and clearance) of the accepted price plans. All other item planning measures, such as shrink, margin, profit, and so on, are recalculated. At that point, you can compare the re-approved item plan to the MFP measures.

Monitor and Adjust Item Plans

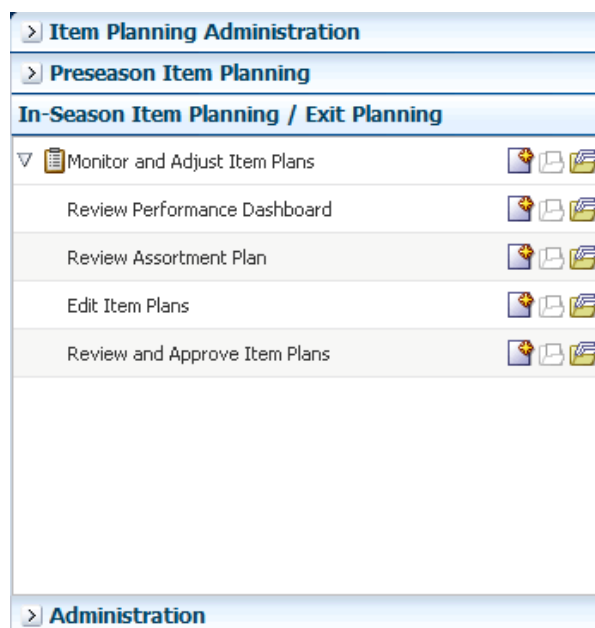
Use the Monitor and Adjust Item Plans task to seed the new price plan from the [Review and Accept Price Plans](#) task into the associated Wp measures.

In Monitor and Adjust Item Plan task has five steps:

- [Review Performance Dashboard Step](#)
- [Review Assortment Plan Step](#)
- [Seed from Accepted Price Plan Step](#)
- [Edit Item Plans Step](#)
- [Review and Approve Item Plans Step](#)

This task and steps are shown in [Figure 9–1](#).

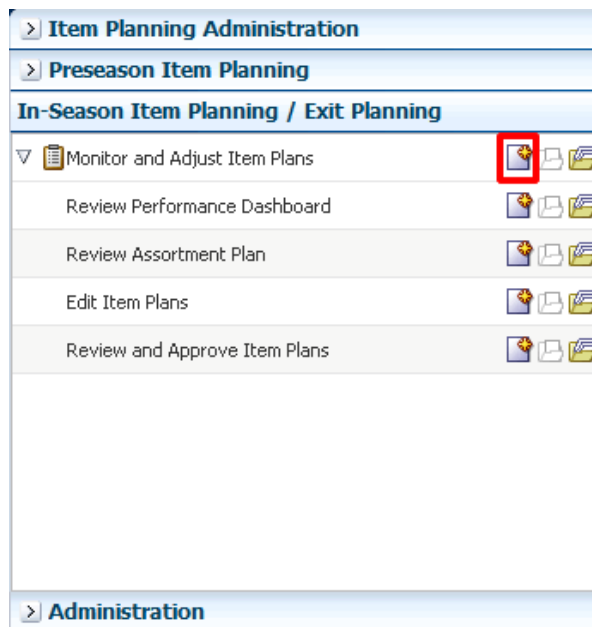
Figure 9–1 *Monitor and Adjust Item Plans Task*



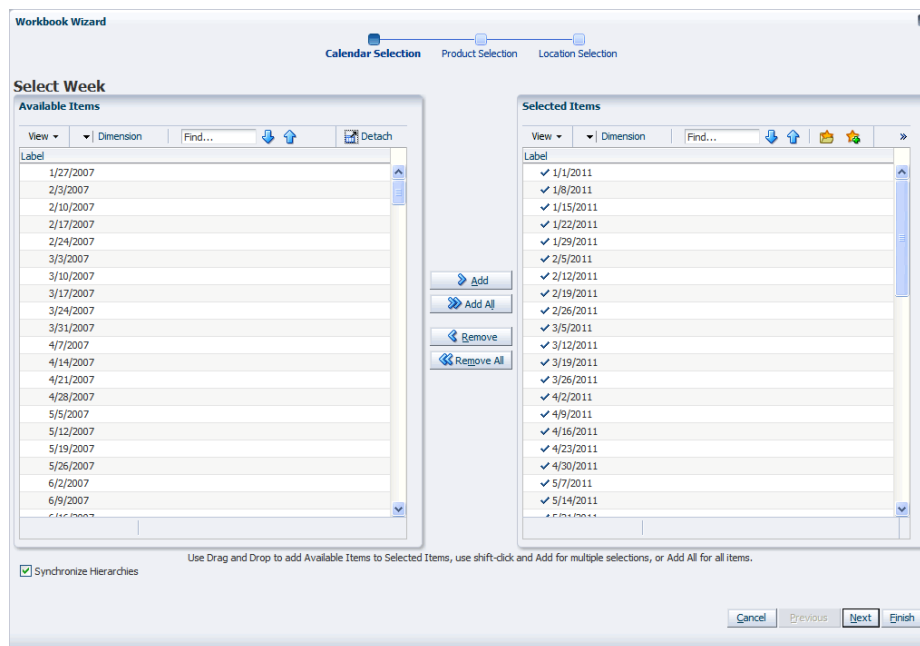
Building the Monitor and Adjust Item Plans Workbook

To build the Monitor and Adjust Item Plans workbook, perform the following steps:

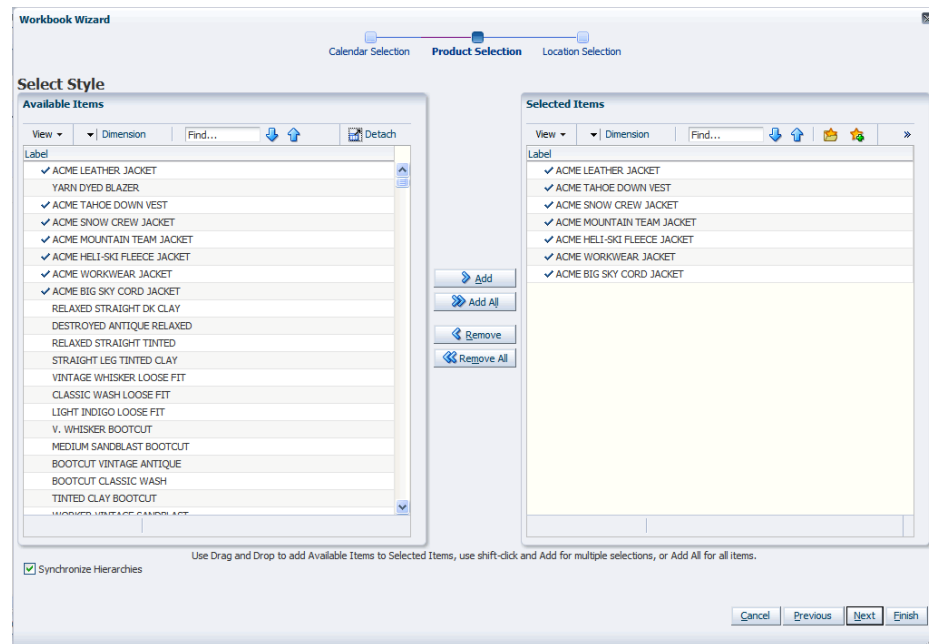
1. Click the **Create New Workbook** icon in the Monitor and Adjust Item Plans task.

Figure 9–2 Create New Workbook Icon

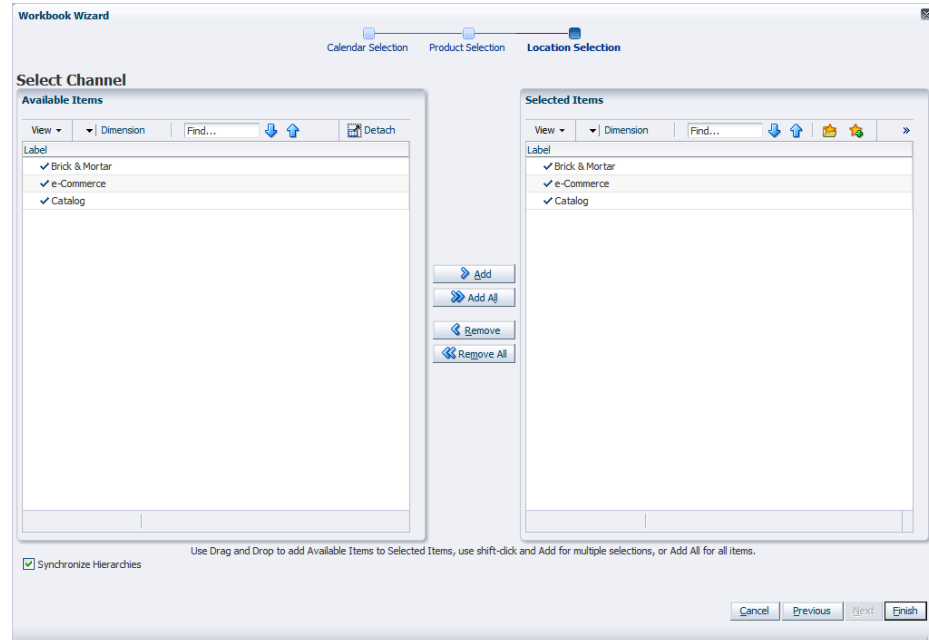
2. The workbook wizard opens at the Calendar Selection step. Select the weeks that you want to plan and move them to the Selected Items box. Click **Next**.

Figure 9–3 Workbook Wizard: Calendar Selection

3. The Product Selection step of the workbook wizard appears. Select the styles you want to plan and move them to the Selected Items box. Click **Next**.

Figure 9–4 Workbook Wizard: Product Selection

4. The Location Selection step of the workbook wizard appears. Select the channels you want to plan and move them to the Selected Items box. Click **Finish**.

Figure 9–5 Workbook Wizard: Location Selection

The Monitor and Adjust Item Plans workbook is built, and the [Dashboard View](#) opens.

Review Performance Dashboard Step

Use the views in this step to review the lifecycle of the style/color as it was setup in the [Develop and Approve Item Plans](#) task. This step has two views:

- [Bounds View](#)
- [Dashboard View](#)

Dashboard View

Use the dashboard view for a quick overview of each style/color's data.

The exception measures in this view highlight data that falls within or outside of the bounds set in the next view.

Figure 9–6 Dashboard View

The screenshot shows a software interface titled 'Dashboard'. It includes filters for 'Location' (Brick & Mortar) and 'Product' (ACME LEATHER JACKET/BLACK). There are tabs for 'Measure_Status' and 'Measure'. A toolbar with various icons is visible above the table. The table itself has four columns: '01. Total', '02. Total', '03. Total Act/Proj diff to Total Plan', and an unlabeled column for the measure name. The measures listed are Sales Retail, Sales Exception, Markdown, Markdown Exception, Gross Margin, Gross Margin Exception, Gross Margin %, Gross Margin % Exception, Sell Thru %, Sell Thru % Exception, Turn Retail, and Turn Exception. The 'Gross Margin' row shows a value of 87,230 in the '02. Total' column and 87,230 in the '03. Total' column.

	01. Total	02. Total	03. Total Act/Proj diff to Total Plan
Sales Retail	0	0	0
Sales Exception	0.00	0.00	0.00
Markdown	0	0	0
Markdown Exception	0.00	0.00	0.00
Gross Margin	0	87,230	87,230
Gross Margin Exception	0.00	0.00	0.00
Gross Margin %	0	0	0
Gross Margin % Exception	0.00	0.00	0.00
Sell Thru %	0	0	0
Sell Thru % Exception	0.00	0.00	0.00
Turn Retail	0	0	0
Turn Exception	0.00	0.00	0.00

Table 9–1 lists the measures available on this view.

Table 9–1 Dashboard View Measures

Measure	Description
Sales Retail	The Retail value of Sales.
Sales Exception	The Sales exception that is highlighted per the user-defined upper and lower bound limits.
Markdown	Total Markdowns Retail .
Markdown Exception	The Markdown exception that is highlighted per the user-defined upper and lower bound limits.
Gross Profit	Gross Profit Retail.
Gross Profit Exception	The Gross profit result that is highlighted per the user-defined upper and lower bound limits.
Gross Profit %	Gross Profit Rate.
Gross Profit Exception	The Gross profit % result that is highlighted per the user-defined upper and lower bound limits.
Sell Thru %	The rate at which sales units are moved through beginning of period inventory.
Sell Thru % Exception	The Sell through % exception that is highlighted per the user-defined upper and lower bound limits.

Table 9–1 (Cont.) Dashboard View Measures

Measure	Description
Turn Retail	Cumulative Turnover representing the frequency which Inventory is sold and replaced over a stated time period.
Turn Exception	The turn exception that is highlighted per the user-defined upper and lower bound limits.

Bounds View

This view allows you to set the upper and lower bounds for sales, markdown, gross profit, sell through, and turn.

Figure 9–7 Bounds View

The screenshot shows a software interface titled 'Bounds'. It includes a navigation pane on the left with 'Location' and 'Product' tabs. The 'Product' tab is selected, showing 'Brick & Mortar' and 'ACME LEATHER JACKET/BLACK'. A toolbar at the top right contains icons for 'Measure_Status' and 'Measure'. Below the navigation pane is a table with the following data:

	01. Total	02. Total	03. Total Act/Proj diff to Total Plan
Sales Lower Boundary	0.00	0.00	0.00
Sales Upper Boundary	0.00	0.00	0.00
Markdown Lower Boundary	0.00	0.00	0.00
Markdown Upper Boundary	0.00	0.00	0.00
Gross Margin Lower Boundary	0.00	0.00	0.00
Gross Margin Upper Boundary	0.00	0.00	0.00
Gross Margin % Lower Boundary	0.0 %	0.0 %	0.0 %
Gross Margin % Upper Boundary	0.0 %	0.0 %	0.0 %
Sell Thru % Lower Boundary	0.0 %	0.0 %	0.0 %
Sell Thru % Upper Boundary	0.0 %	0.0 %	0.0 %
Turn Lower Boundary	0.00	0.00	0.00
Turn Upper Boundary	0.00	0.00	0.00

Table 9–2 lists the measures available on this view.

Table 9–2 Bounds View Measures

Measure	Description
Sales Lower Bound	User-defined sales lower limit. If the sales of any style/color is below this threshold, it is highlighted in the Dashboard view as an exception.
Sales Upper Bound	User-defined sales upper limit. If the sales of any style/color is above this threshold, it is highlighted in the Dashboard view as an exception.
Markdown Lower Bound	User-defined markdown lower limit. If the markdown of any style/color is below this threshold, it is highlighted in the Dashboard view as an exception.
Markdown Upper Bound	User-defined markdown upper limit. If the markdown of any style/color is above this threshold, it is highlighted in the Dashboard view as an exception.
Gross Profit Lower Bound	User-defined gross profit lower limit. If the gross profit of any style/color is below this threshold, it is highlighted in the Dashboard view as an exception.

Table 9–2 (Cont.) Bounds View Measures

Measure	Description
Gross Profit Upper Bound	User-defined gross profit upper limit. If the gross profit of any style/color is above this threshold, it is highlighted in the Dashboard view as an exception.
Gross Profit % Lower Bound	User-defined gross profit percentage lower limit. If the gross profit percentage of any style/color is below this threshold, it is highlighted in the Dashboard view as an exception.
Gross Profit % Upper Bound	User-defined gross profit percentage upper limit. If the gross profit percentage of any style/color is above this threshold, it is highlighted in the Dashboard view as an exception.
Sell Thru % Lower Bound	User-defined sell through percentage lower limit. If the sell through percentage of any style/color is below this threshold, it is highlighted in the Dashboard view as an exception.
Sell Thru % Upper Bound	User-defined sell through percentage upper limit. If the sell through percentage of any style/color is above this threshold, it is highlighted in the Dashboard view as an exception.
Turn Lower Bound	User-defined turn percentage lower limit. If the turn of any style/color is below this threshold, it is highlighted in the Dashboard view as an exception.
Turn Upper Bound	User-defined turn percentage upper limit. If the turn of any style/color is above this threshold, it is highlighted in the Dashboard view as an exception.

After you have reviewed the dashboard, continue to the [Review Assortment Plan Step](#).

Review Assortment Plan Step

The Review Assortment Plan step has two views:

- [Assortment Plan Parameters View](#)
- [Assortment Plan Details View](#)

If you do not use Assortment Planning, continue to the [Edit Item Plans Step](#).

Assortment Plan Parameters View

Review the views in the Assortment Plan step if you have loaded data from the Assortment Planning application.

Figure 9–8 Review Assortment Plan Parameters View

	1000000 Suede Loafer Brown	1000001 Suede Loafer Black
Start Sales Date	6/6/2011	6/6/2011
Number of weeks at Clearance Price	0	0
Number of Weeks at Regular Price	13	13
Product Cost	18	20
Product Original Ticket Price	0	0
Exit Date	10/10/2011	10/10/2011
Ap Cp Clearance Price Retail	12	0
Ap Cp Clearance Cost	0	9

Table 9–3 lists the measures available on this view.

Table 9–3 Assortment Plan Parameters View Measures

Measure	Description
Product Original Ticket Price	Initial retail of product.
Product Cost	The cost of the product.
Start Sales Date	The date the product is expected to start selling.
Number of weeks at Clearance Price	Number of weeks the item is expected to sell at Clearance Price.
Number of Weeks at Regular Price	Number of weeks the item is expected to sell at Regular Price.
Exit Date	The date that the product should be removed from the sales floor.

Assortment Plan Details View

Use the Assortment Plan Details view to see the plan that was created in the Assortment Planning application for the same style-colors you are planning.

Figure 9–9 Assortment Plan Details View

	1000000 Suede Loafer Brown
Ap Cp Store Count	300
Ap Cp Clearance Sales Units	2,700
Ap Cp Clearance Sales Retail	43,200
AP Cp Ttl Sls U	21,600
AP Cp Ttl Sls R	756,000
AP Cp Gross Margin	302,400
AP Cp GM R%	40.0%
.	
Ap Cp First Markdown % Off	40.0%
Ap Cp Promo Price Retail	36
Ap Cp Perm Price Retail	40
Ap Cp Clearance Price Retail	16
.	
Ap Cp Receipts Units	22,000
Ap Cp Receipts Retail	880,000
AP Cp Average Recpts Per Str	73
AP Cp Receipts AUR	40.0
Ap Cp BOP Inv Units	1,000
Ap Cp BOP Inv Retail	40,000
Ap Cp EOP Inv Units	0
Ap Cp EOP Inv Retail	0
AP Cp EopPerStr U%	0.0%

Table 9–4 lists the measures available on this view.

Table 9–4 Assortment Plan Details View Measures

Measure	Description
Ap Cp Store Count	The number of stores for which this style/color is planned for in the approved plan from the Assortment Planning application.
Ap Cp Clearance Sales Units	Assortment Planning Current Plan Clearance Sales units.
Ap Cp Clearance Sales Retail	Assortment Planning Current Plan Clearance Sales retail.
Ap Cp Ttl Sls U	Assortment Planning Current Plan Total Sales Units.
Ap Cp Ttl Sls R	Assortment Planning Current Plan Total Sales Retail.
AP Cp Gross Margin	Assortment Planning Current Plan Gross Margin.
Ap Cp GM R%	Assortment Planning Current Plan Gross Margin rate.
Ap Cp First Markdown % Off	Initial Markdown Taken expressed as a rate.

Table 9–4 (Cont.) Assortment Plan Details View Measures

Measure	Description
Ap Cp Promo Price Change %	Assortment Planning Current Plan Promotional Price Change %.
Ap Cp Perm Price Change %	Permanent Price Change expressed as a rate.
Ap Cp Clearance Price Retail	Assortment Planning Current Plan Clearance Price Change %.
Ap Cp Receipts Units	Receipts expressed as Units.
Ap Cp Receipts Retail	Assortment Planning Current Plan Receipts Retail.
AP Cp Average Recpts Per Str	Assortment Planning Current Plan Average Receipts per store.
AP Cp Receipts AUR	Assortment Planning Current Plan Receipts Average Unit Retail.
Ap Cp BOP Inv Units	The Beginning of Period inventory units from Assortment Planning's current plan.
Ap Cp BOP Inv Retail	The Beginning of Period inventory retail from Assortment Planning's current plan.
Ap Cp EOP Inv Retail	The End of Period inventory retail.
Ap Cp EOP Inv Units	The End of Period inventory units.
AP Cp EopPerStr U%	Assortment Planning Current Plan End of Period Per Store Unit %.

After you have reviewed the parameters from the Assortment Planning application, continue to the [Edit Item Plans Step](#) to edit your own parameters.

Seed from Accepted Price Plan Step

Use this view to seed the accepted price plan that you created in the [Review and Accept Price Plans](#) task. This step has one view: Seed.

Seed View

Use this view to seed the item plan with the accepted price plan. To do this, select **Accepted Price Plan** as the seed source. The working plan measures of the selected style/colors are updated based on the planned sales units (regular and clearance) of the accepted price plans. All other item planning measures, such as shrink, margin, profit, and so on, are recalculated.

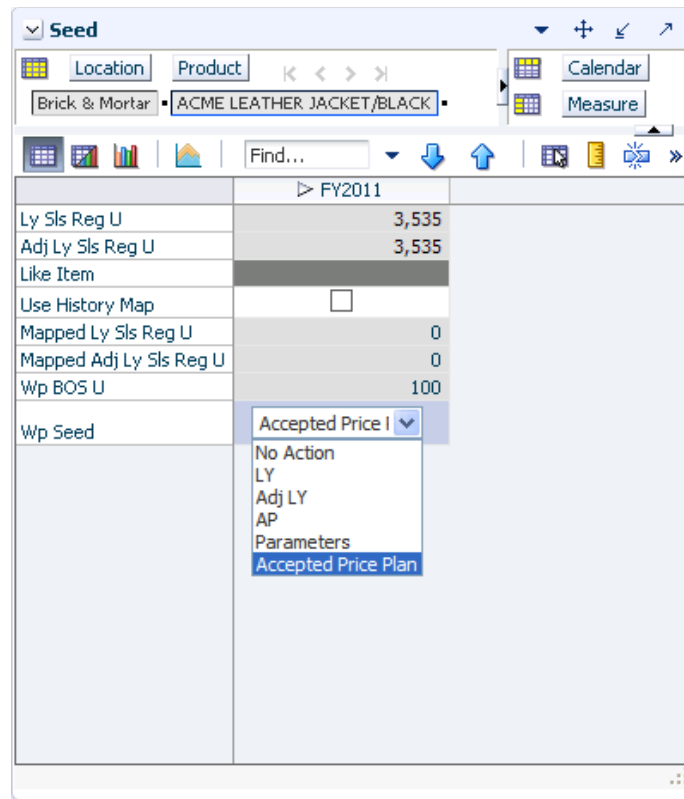
Figure 9–10 Seed View: Seeding with the Accepted Price Plan

Table 9–5 lists the measures available on this view.

Table 9–5 Seed View Measures

Measure	Description
Ly Sls Reg U	The regular units from last year's sales.
Adj Ly Sls Reg U	The adjusted regular units from last year's sales.
Like Item	The style/color that you mapped the current style/color to in the Maintain Item and Store Attributes task.
Use History Map	Select this option to use the history of the style that you mapped the current style to in the Maintain Item and Store Attributes task.
Mapped Ly Sls Reg U	The regular units from last year's sales of the like item.
Mapped Adj Ly Sls Reg U	The adjusted regular units from last year's sales of the like item.
Wp BOS U	The planned Beginning of Season total units.
Wp Seed	The source used to seed the working plan. Use the dropdown to select the source to use for seeding.

Seeding the Plan

To seed the plan, perform the following steps:

1. Roll the calendar hierarchy up to year.
2. Select the style/color you want to seed in the product hierarchy.
3. In the Wp Seed measure, choose the **Accepted Price Plan** option.

4. Select **Use Hist Map** if you want to use the data of the like item shown in the Like Item measure.
5. When you have selected all the data you want to seed, click the **Seed** button in the upper right corner.

Figure 9–11 Seed Button



6. A confirmation message appears, stating that the data has been successfully seeded. Click **OK**.

Figure 9–12 Seeding Success Message



After you have seeded, continue to the [Edit Item Plans Step](#) to review the plan.

Edit Item Plans Step

This step has one view: Item Plan. Use this view to review and edit the item plan.

Figure 9–13 Item Plan View

Item Plan								
Location	Product							
Brick & Mortar	ACME LEATHER JACKET/BLACK							
Find...								
all [Calendar]	Aug FY2011	7/30/2011	8/6/2011	8/13/2011	8/20/2011	8/27/2011		
AP Cp Ttl Sls U	0	0	0	0	0	0	0	0
Wp Fcst Pre-Season U	0	0	0	0	0	0	0	0
Wp Ttl Sls U	8,866	1,583	317	317	317	317	317	
Wp Sls Reg U	3,535	631	126	126	126	126	126	
Wp Sls Promo U	4,361	779	156	156	156	156	156	
Wp Sls Clr U	970	173	35	35	35	35	35	
Regular Price	\$50.00	\$50.00	\$50.00	\$50.00	\$50.00	\$50.00	\$50.00	
Wp Sls Reg R	176,750	31,563	6,313	6,313	6,313	6,313	6,313	
Promo Price	\$39.73	\$39.73	\$39.73	\$39.73	\$39.73	\$39.73	\$39.73	
Wp Sls Promo R	173,263	30,940	6,188	6,188	6,188	6,188	6,188	
Clearance Price	\$16.50	\$16.50	\$16.50	\$16.50	\$16.50	\$16.50	\$16.50	
Wp Sls Clr R	16,005	2,858	572	572	572	572	572	
Wp Ttl Sls R	366,018	65,360	13,072	13,072	13,072	13,072	13,072	
Wp Ttl Sls AUR	41.3	41.3	41.3	41.3	41.3	41.3	41.3	
Wp Ttl Sls AUC	20.0	20.0	20.0	20.0	20.0	20.0	20.0	
Wp Ttl Sls C	177,320	31,664	6,333	6,333	6,333	6,333	6,333	
Regular Cost	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00	
Clearance Cost	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00	
Wp MD Promo R	44,804	7,394	27,110	10,300	10,300	0	0	
Wp MD Clr R	53,346	0	0	0	0	0	0	
Wp GM	179,026	11,017	53,352	103,002	20,270	24,923	23,206	
Wp GM %	48.6 %	46.7 %	49.2 %	56.9 %	49.2 %	59.2 %	59.2 %	

After you are satisfied with the sales plan, continue to the [Review and Approve Item Plans Step](#).

Review and Approve Item Plans Step

After you have edited the sales and margin and receipts and inventory plans, compare them to the plans created in the Merchandise Financial Planning (MFP) application. Once you have reviewed the plans, approve them in the Plan Approval view.

This step includes views that are similar to the Review and Approve Item Plans Step in the Develop and Approve Item Plans task. For more information, see [Review and Approve Item Plans Step](#).

Approval to Original Plan

The Approval to Original Plan task is used by planning administrators only. They use the task to enable and disable the ability of users to approve a quarterly original plan (Op). If the planning administrator disables the Op approval, users cannot approve plans to Op status.

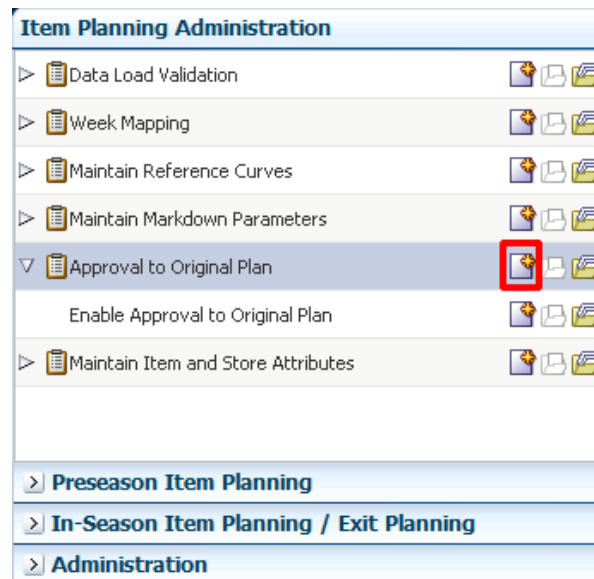
By default, the Op approval is set to enabled.

Building the Approval to Original Plan Workbook

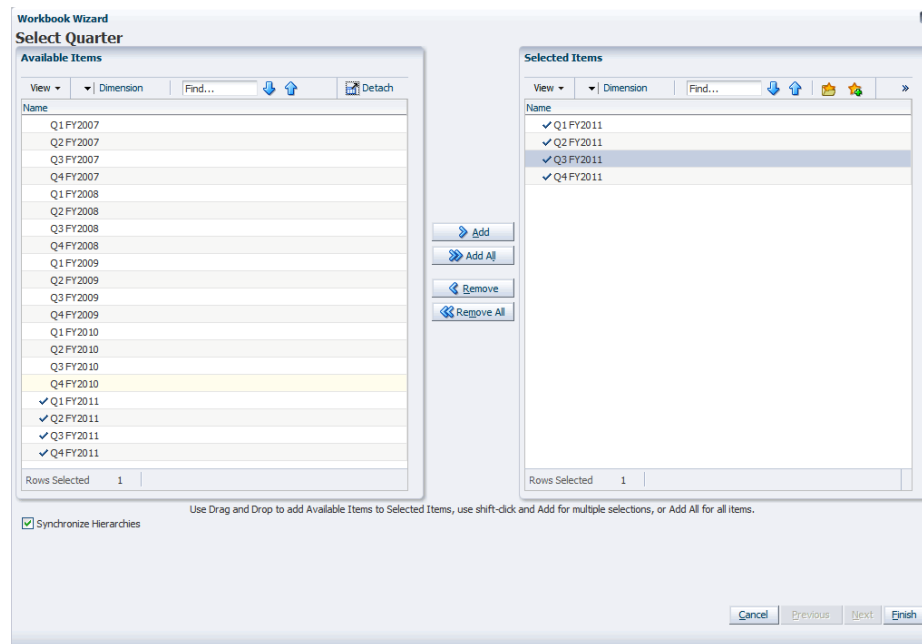
To build a new Approval to Original Plan workbook, perform the following steps:

1. Click the **New Workbook** icon in the Approval to Original Plan task.

Figure 10–1 Approval to Original Plan Validation



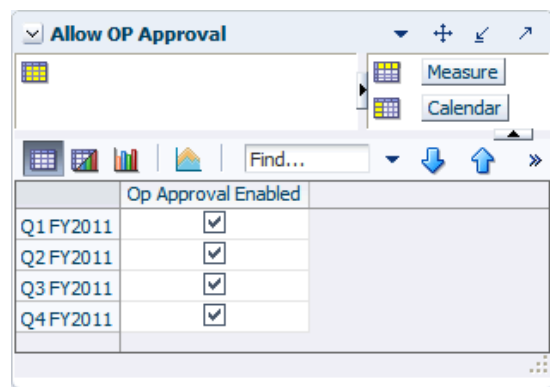
2. The workbook wizard opens at the Calendar Selection step. Select the quarter you want to enable and click **Finish**.

Figure 10–2 Approval to Original Plan Workbook Wizard - Calendar Selection

The Approval to Original Plan workbook is built and opens at the [Allow Op Approval](#) step.

Allow Op Approval

The Allow Op Approval step has one view: Allow OP Approval. Select the quarters that you want to enable users to approve plans to the original plan.

Figure 10–3 Allow OP Approval View

The following table lists the measures available on this view.

Table 10–1 Allow Op Approval View Measures

Measure	Description
Op Approval Enabled	Select this measure to enable users to approve plans to the original plan for the quarter.

Data Load Validation

The Data Load Validation step contains all measures that are either loaded or touched during the batch calculation process. This template is used by the administrator only to verify the results of data loads and batch processes.

The Data Load Validation workbook contains the following views:

- [Assortment Planning Measures](#)
- [Default Measures](#)
- [Item Planning Measures](#)
- [MFP Measures](#)

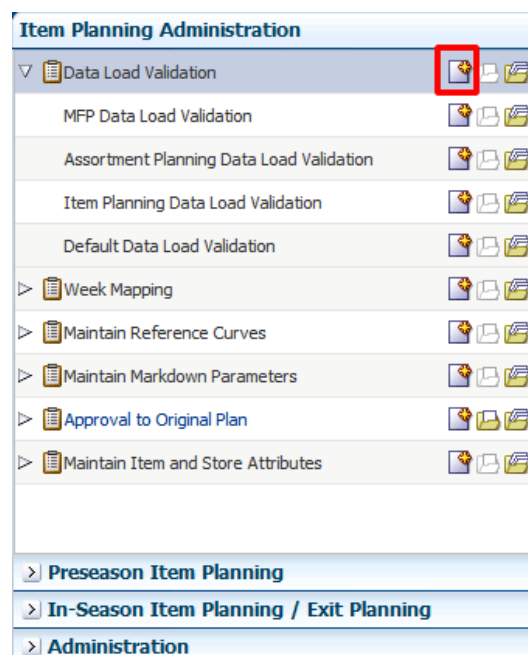
To use the Data Load Validation workbook, you need to first build the workbook.

Building the Data Load Validation Workbook

To build a Data Load Validation workbook, perform the following steps:

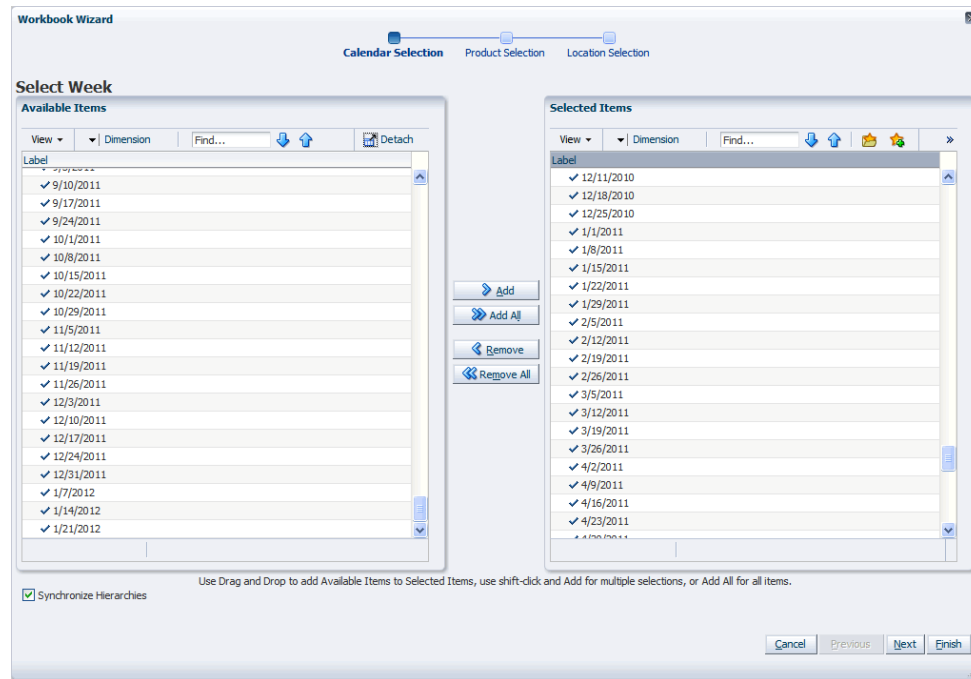
1. Click the **New Workbook** icon in the Data Load Validation step.

Figure 11–1 Data Load Validation



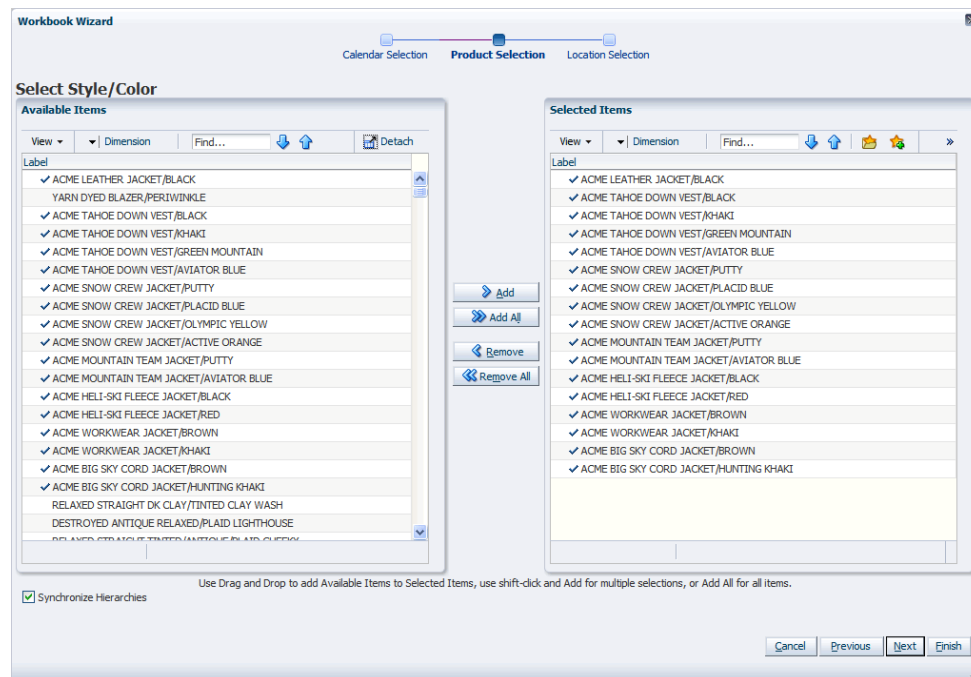
- The workbook wizard opens at the Calendar Selection step. Select the weeks you want to validate and click **Next**.

Figure 11–2 Data Load Validation Workbook Wizard - Calendar Selection



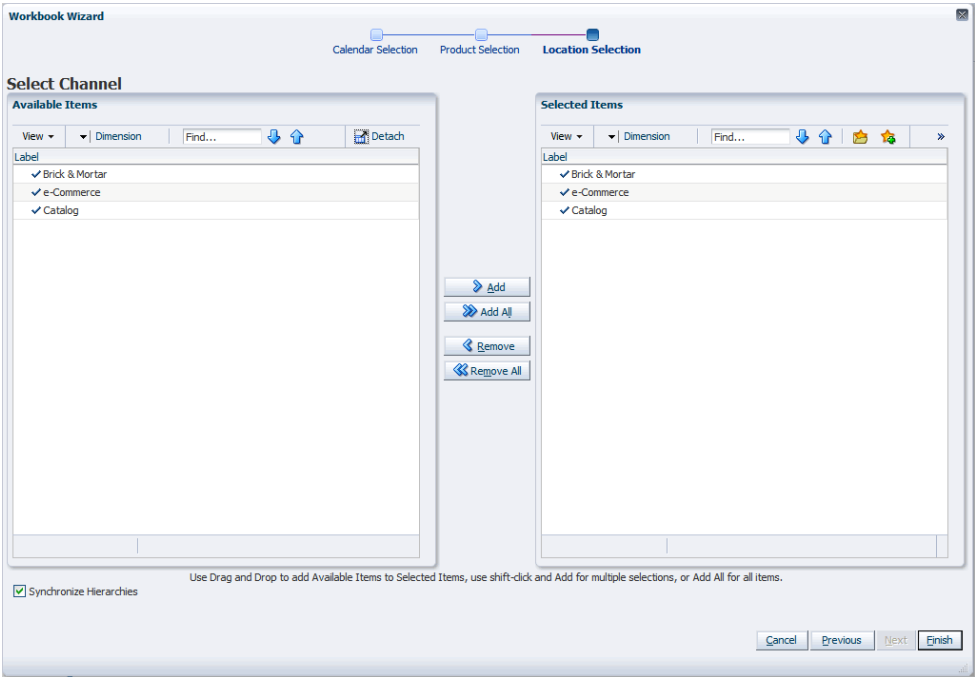
- The Product Selection step appears. Select the style-colors and click **Next**.

Figure 11–3 Data Load Validation Workbook Wizard - Product Selection



- The Location Selection step appears. Select the stores and click **Finish**.

Figure 11–4 Data Load Validation Workbook Wizard - Location Selection



The Data Load Validation workbook is built.

Assortment Planning Measures

Use the Assortment Planning Measures view to validate that the Assortment Planning data was updated in the batch process.

Figure 11–5 Assortment Planning View

	1/1/2011	1/8/2011	1/15/2011	1/22/2011
Ap Cp BOP Inv Cost	0	0	0	0
Ap Cp BOP Inv Retail	0	0	0	0
Ap Cp BOP Inv Units	0	0	0	0
Product Cost				
Ap Cp EOP Inv Cost	0	0	0	0
AP Cp EopPerStr U%	0.0 %	0.0 %	0.0 %	0.0 %
Ap Cp EOP Inv Retail	0	0	0	0
Ap Cp EOP Inv Units	0	0	0	0
Exit Date				
AP Cp Gross Margin	0	0	0	0
AP Cp GM R%	0.0 %	0.0 %	0.0 %	0.0 %
Ap Cp Clearance Markdown Retail	0	0	0	0
Ap Cp First Markdown % Off	0.0 %	0.0 %	0.0 %	0.0 %
Ap Cp Perm Markdown Retail	0	0	0	0
Ap Cp Promo Markdown Retail	0	0	0	0
Pack Size	1	1	1	1
Ap Cp Clearance Price Change %	0.0 %	0.0 %	0.0 %	0.0 %
Ap Cp Clearance Price Retail	0	0	0	0
Ap Cp Perm Price Change %	0.0 %	0.0 %	0.0 %	0.0 %
Product Original Ticket Price				
Ap Cp Promo Price Change %	0.0 %	0.0 %	0.0 %	0.0 %
Ap Cp Promo Price Retail	0	0	0	0
Ap Cp Perm Price Retail	0	0	0	0
AP Cp Receipts AUC	0.0	0.0	0.0	0.0
AP Cp Receipts AUR	0.0	0.0	0.0	0.0
Ap Cp Receipts Cost	0	0	0	0
AP Cp Average Recpts Per Str	0.0	0.0	0.0	0.0
Ap Cp Receipts Retail	0	0	0	0
Ap Cp Receipts Units	0	0	0	0
AP Cp Receipts U%	0.0 %	0.0 %	0.0 %	0.0 %
AP Cp Ttl Sls AUC	0.0	0.0	0.0	0.0
AP Cp Ttl Sls AUR	0.0	0.0	0.0	0.0
AP Cp Ttl Sls C	0	0	0	0
AP Cp Sls Clr AUC	0.0	0.0	0.0	0.0
AP Cp Sls Clr AUR	0.0	0.0	0.0	0.0
Ap Cp Clearance Sales Cost	0	0	0	0
Ap Cp Clearance Sales Retail	0	0	0	0
Ap Cp Clearance Sales Units	0	0	0	0

The following table lists the measures available on this view.

Table 11–1 Assortment Planning Measures

Measure	Description
BOP Inv Cost	Assortment Planning Current Plan Beginning of Period Inventory Cost.
BOP Inv Retail	Assortment Planning Current Plan Beginning of Period Inventory Retail.
BOP Inv Units	Assortment Planning Current Plan Beginning of Period Inventory Units.
Product Cost	The cost of the product.
EOP Inv Cost	End of Period Inventory Cost.
AP Cp EopPerStr U%	Assortment Planning Current Plan EOP Per Store Unit %.

Table 11-1 (Cont.) Assortment Planning Measures

Measure	Description
EOP Inv Retail	End of Period Inventory Retail.
EOP Inv Units	End of Period Inventory Units.
Exit Date	Date that inventory should be removed from sales floor.
AP Cp Gross Margin	Assortment Planning Current Plan Gross Margin.
AP Cp GP R%	Assortment Planning Current Plan Gross Profit Retail %.
Clearance Markdown Retail	Assortment Planning Current Plan Clearance Markdowns - Price reduction used to clear aged or slow moving inventory at Retail.
Perm Markdown Retail	Permanent Markdowns representing a permanent retail decrease to the owned inventory price of merchandise for strategic downward re-pricing decisions at Retail.
Promo Markdown Retail	Promotional Markdowns representing the temporary reduction to the owned inventory price for promotional purposes expressed at Retail.
Pack Size	Quantity of style/color or styles purchased from Supplier as a pack.
AP Cp Price AUC	Assortment Planning Current Plan Average Unit Cost.
AP Cp Price AUR	Assortment Planning Current Plan Average Unit Retail.
AP Cp Price Clr AUC	Assortment Planning Current Plan Price Clearance Average Unit Cost.
AP Cp Price Clr AUR	Assortment Planning Current Plan Price Clearance Average Unit Retail.
Clearance Price Change %	Assortment Planning Current Plan Clearance Price Change percentage.
Clearance Price Retail	Assortment Planning Current Plan Clearance Price Retail.
Perm Price Change %	Permanent Price Change expressed as a rate.
Product Original Ticket Price	Initial retail of product.
Promo Price Change %	Assortment Planning Current Plan Promotional Price Change percentage.
Promo Price Retail	Promotional Price Average Unit Retail.
Perm Price Retail	Average Unit Retail resulting from a Permanent Price Change.
AP Cp Price Reg AUC	Assortment Planning Current Plan Price Regular Average Unit Cost.
AP Cp Price Reg AUR	Assortment Planning Current Plan Price Regular Average Unit Retail.
AP Cp Receipts AUC	Assortment Planning Current Plan Receipts Average Unit Cost.
AP Cp Receipts AUR	Assortment Planning Current Plan Receipts Average Unit Retail.
Receipts Cost	Assortment Planning Current Plan Receipts Cost.
AP Cp Average Recpts Per Str	Assortment Planning Current Plan Average Receipts per store.
Receipts Retail	Assortment Planning Current Plan Receipts Retail.
Receipts Units	Receipts expressed as Units.

Table 11–1 (Cont.) Assortment Planning Measures

Measure	Description
AP Cp Receipts U%	Assortment Planning Current Plan Receipts Units rate.
AP Cp Sls C	Assortment Planning Current Plan Sales Cost.
Clearance Sales Cost	Assortment Planning Current Plan Clearance Sales Cost.
Clearance Sales Retail	Assortment Planning Current Plan Clearance Sales Retail.
Clearance Sales Units	See Clearance Sell Thru %.
AP Cp Avg Sls Per Str U	Assortment Planning Current Plan Average Sales per store represented in units.
AP Cp Sls R	Assortment Planning Current Plan Sales Retail.
Regular Sales Cost	Assortment Planning Current Plan Regular Sales Cost.
Regular Sales Retail	Assortment Planning Current Plan Regular Sales Retail.
Regular Sales Units	Assortment Planning Current Plan Regular Sales Units.
Start Sales Date	The date the product is expected to start selling.
AP Cp Sls U	Assortment Planning Current Plan Sales Units.
Sell Thru %	Assortment Planning Current Plan Sell Thru representing the percent of total available Inventory sold in a period of time Change %.
Store Count	Count of Stores.
Number of weeks at Clearance Price	Number of weeks the item is expected to sell at Clearance Price.
Number of Weeks at Regular Price	Number of weeks the item is expected to sell at Regular Price.

Default Measures

Use the Default Measures view to validate that the default measure data was updated in the batch process.

Figure 11–6 Default Measures View

	1/1/2011	1/8/2011	1/15/2011	1/22/2011
DR Ty EOP Clr C	0	0	0	0
DR Ty EOP Clr R	0	0	0	0
DR Ty EOP Clr U	0	0	0	0
DR Ty EOP Reg C	0	0	0	0
DR Ty EOP Reg R	0	0	0	0
DR Ty EOP Reg U	0	0	0	0
DR Ty MD Allowance R	0	0	0	0
DR Ty On Order C	0	0	0	0
DR Ty On Order R	0	0	0	0
DR Ty On Order U	0	0	0	0
DR Ty Receipts C	0	0	0	0
DR Ty Receipts R	0	0	0	0
DR Ty Receipts U	0	0	0	0
DR Ty Sls Clr C	0	0	0	0
DR Ty Sls Clr R	0	0	0	0
DR Ty Sls Clr U	0	0	0	0
DR Ty Sls Promo C	0	0	0	0
DR Ty Sls Promo R	0	0	0	0
DR Ty Sls Promo U	0	0	0	0
DR Ty Sls Reg C	0	0	0	0
DR Ty Sls Reg R	0	0	0	0
DR Ty Sls Reg U	0	0	0	0

The following table lists the measures available on this view.

Table 11–2 Default Measures View Measures

Measure	Description
DR Ty EOP Clr C	Default Role Used for Loading Measures This Year End of Period Clearance Inventory Cost.
DR Ty EOP Clr R	Default Role Used for Loading Measures This Year End of Period Clearance Inventory Retail.
DR Ty EOP Clr U	Default Role Used for Loading Measures This Year End of Period Clearance Inventory Units.
DR Ty EOP Reg C	Default Role Used for Loading Measures This Year End of Period Regular Inventory Cost.
DR Ty EOP Reg R	Default Role Used for Loading Measures This Year End of Period Regular Inventory Retail.
DR Ty EOP Reg U	Default Role Used for Loading Measures This Year End of Period Regular Inventory Units.
DR Ty On Order C	Default Role Used for Loading Measures This Year On Order Cost.
DR Ty MD Allowance R	Default Role Used for Loading Measures This Year Markdown Allowances Retail.
DR Ty On Order R	Default Role Used for Loading Measures This Year On Order Retail.

Table 11–2 (Cont.) Default Measures View Measures

Measure	Description
DR Ty On Order U	Default Role Used for Loading Measures This Year On Order Units.
DR Ty Receipts C	Default Role Used for Loading Measures This Year Receipts Cost.
DR Ty Receipts R	Default Role Used for Loading Measures This Year Receipts Retail.
DR Ty Receipts U	Default Role Used for Loading Measures This Year Receipts Units.
DR Ty Sls Clr C	Default Role Used for Loading Measures This Year Clearance Sales Cost.
DR Ty Sls Clr R	Default Role Used for Loading Measures This Year Clearance Sales Retail.
DR Ty Sls Clr U	Default Role Used for Loading Measures This Year Clearance Sales Units.
DR Ty Sls Promo C	Default Role Used for Loading Measures This Year Promotional Sales Cost.
DR Ty Sls Promo R	Default Role Used for Loading Measures This Year Promotional Sales Retail.
DR Ty Sls Promo U	Default Role Used for Loading Measures This Year Promotional Sales Units.
DR Ty Sls Reg C	Default Role Used for Loading Measures This Year Regular Sales Cost.
DR Ty Sls Reg R	Default Role Used for Loading Measures This Year Regular Sales Retail.
DR Ty Sls Reg U	Default Role Used for Loading Measures This Year Regular Sales Units.

Item Planning Measures

Use the Item Planning Measures view to validate that the Item Planning data was updated in the batch process.

Figure 11–7 Item Planning View

The screenshot shows the 'Item Planning measures' window. At the top, there are tabs for 'Location' and 'Product'. Below them, the selected location is 'Brick & Mortar' and the product is '1000000 Suede Loafer Brown'. To the right, there are buttons for 'Calendar' and 'Measure'. Below these, there is a 'Find...' search bar and a set of navigation arrows. The main area is a table with columns for dates: 1/1/2011, 1/8/2011, 1/15/2011, 1/22/2011, and 1/29/2011. The rows list various measures, all of which have a value of 0 in the displayed columns.

	1/1/2011	1/8/2011	1/15/2011	1/22/2011	1/29/2011
Wp BOP Inv C	0	0	0	0	0
Wp BOP Inv R	0	0	0	0	0
Wp BOP Inv U	0	0	0	0	0
Wp EOP Inv C	0	0	0	0	0
Wp EOP Inv R	0	0	0	0	0
Wp EOP Inv U	0	0	0	0	0
Wp MD Allowance R	0	0	0	0	0
Wp On Order C	0	0	0	0	0
Wp On Order R	0	0	0	0	0
Wp On Order U	0	0	0	0	0
Wp Receipts C	0	0	0	0	0
Wp Receipts R	0	0	0	0	0
Wp Receipts U	0	0	0	0	0
Wp Sls Clr C	0	0	0	0	0
Wp Sls Clr R	0	0	0	0	0
Wp Sls Clr U	0	0	0	0	0
Wp Sls Promo C	0	0	0	0	0
Wp Sls Promo R	0	0	0	0	0
Wp Sls Promo U	0	0	0	0	0
Wp Sls Reg C	0	0	0	0	0
Wp Sls Reg R	0	0	0	0	0
Wp Sls Reg U	0	0	0	0	0

The following table lists the measures available on this view.

Table 11–3 Item Planning Measures View Measures

Measure	Description
WP BOP Clr C	Working Plan Clearance Beginning of Period Inventory Cost.
WP BOP Clr R	Working Plan Clearance Beginning of Period Inventory Retail.
WP BOP Clr U	Working Plan Clearance Beginning of Period Inventory Units.
WP BOP Reg C	Working Plan Regular Beginning of Period Inventory Cost.
WP BOP Reg R	Working Plan Regular Beginning of Period Inventory Retail.
WP BOP Reg U	Working Plan Regular Beginning of Period Inventory Units.
Wp EOP Clr C	Working Plan End of Period Clearance Inventory Cost.
Wp EOP Clr R	Working Plan End of Period Clearance Inventory Retail.
Wp EOP Clr U	Working Plan End of Period Clearance Inventory Units.
Wp EOP Reg C	Working Plan End of Period Regular Inventory Cost.
Wp EOP Reg R	Working Plan End of Period Regular Inventory Retail.
Wp EOP Reg U	Working Plan End of Period Regular Inventory Units.
Wp Inv Adj Clr C	Working Plan adjusted inventory cost for clearance.
Wp Inv Adj Clr R	Working Plan adjusted inventory retail for clearance.

Table 11–3 (Cont.) Item Planning Measures View Measures

Measure	Description
Wp Inv Adj Clr U	Working Plan adjusted inventory units for clearance.
Wp Inv Adj Reg C	Working Plan adjusted inventory cost for regular price.
Wp Inv Adj Reg R	Working Plan adjusted inventory retail for regular price.
Wp Inv Adj Reg U	Working Plan adjusted inventory units for regular price.
Wp MD Allowance R	Working Plan Markdown Allowances Retail.
Wp On Order C	Working Plan On Order Cost.
Wp On Order R	Working Plan On Order Retail.
Wp On Order U	Working Plan On Order Units.
Wp Receipts C	Working Plan Receipts Cost.
Wp Receipts R	Working Plan Receipts Retail.
Wp Receipts U	Working Plan Receipts Units.
Wp Sls Clr C	Working Plan Clearance Sales Cost.
Wp Sls Clr R	Working Plan Clearance Sales Retail.
Wp Sls Clr U	Working Plan Clearance Sales Units.
Wp Sls Promo C	Working Plan Promotional Sales Cost.
Wp Sls Promo R	Working Plan Promotional Sales Retail.
Wp Sls Promo U	Working Plan Promotional Sales Units.
Wp Sls Reg C	Working Plan Regular Sales Cost.
Wp Sls Reg R	Working Plan Regular Sales Retail.
Wp Sls Reg U	Working Plan Regular Sales Units.

MFP Measures

Use the MFP Measures view to validate that the MFP data was updated in the batch process.

Figure 11–8 MFP Measures View

	1/1/2011	1/8/2011	1/15/2011	1/22/2011
MFP Cp BOP Inv C	0	0	0	0
MFP Cp BOP Inv R	0	0	0	0
MFP Cp BOP Inv U	0	0	0	0
MFP Cp COGS C	0	0	0	0
MFP Cp EOP Inv C	0	0	0	0
MFP Cp EOP Inv R	0	0	0	0
MFP Cp EOP Inv U	0	0	0	0
MFP Cp GM	0	0	0	0
MFP Cp MD Clr R	0	0	0	0
MFP Cp MD Perm R	0	0	0	0
MFP Cp MD Promo R	0	0	0	0
MFP Cp MD R	0	0	0	0
MFP Cp Receipts C	0	0	0	0
MFP Cp Receipts R	0	0	0	0
MFP Cp Receipts U	0	0	0	0
MFP Cp Ttl Sls C	0	0	0	0
MFP Cp Sls Clr C	0	0	0	0
MFP Cp Sls Clr R	0	0	0	0
MFP Cp Sls Clr U	0	0	0	0
MFP Cp Sales Net VAT R	0	0	0	0
MFP Cp Sls Promo C	0	0	0	0
MFP Cp Sls Promo R	0	0	0	0
MFP Cp Sls Promo U	0	0	0	0
MFP Cp Ttl Sls R	0	0	0	0
MFP Cp Sls Reg C	0	0	0	0
MFP Cp Sls Reg R	0	0	0	0
MFP Cp Sls Reg U	0	0	0	0
MFP Cp Ttl Sls U	0	0	0	0
MFP Op BOP Inv C	0	0	0	0
MFP Op BOP Inv R	0	0	0	0
MFP Op BOP Inv U	0	0	0	0
MFP Op COGS C	0	0	0	0
MFP Op EOP Inv C	0	0	0	0
MFP Op EOP Inv R	0	0	0	0
MFP Op EOP Inv U	0	0	0	0
MFP Op GM	0	0	0	0
MFP Op MD Clr R	0	0	0	0
MFP Op MD Perm R	0	0	0	0

The following table lists the measures available on this view.

Table 11–4 MFP Measures View Measures

Measure	Description
MFP Cp BOP Inv C	MFP Current Plan Beginning of Period Inventory Cost.
MFP Cp BOP Inv R	MFP Current Plan Beginning of Period Inventory Retail.
MFP Cp BOP Inv U	MFP Current Plan Beginning of Period Inventory Units.
MFP Cp COGS C	MFP Current Plan Cost of Goods Sold Cost.
MFP Cp EOP Inv C	MFP Current Plan End of Period Inventory Cost.

Table 11–4 (Cont.) MFP Measures View Measures

Measure	Description
MFP Cp EOP Inv R	MFP Current Plan End of Period Inventory Retail.
MFP Cp EOP Inv U	MFP Current Plan End of Period Inventory Units.
MFP Cp GPM	MFP Current Plan Gross Margin.
MFP Cp MD Clr R	MFP Current Plan Clearance Markdowns Retail.
MFP Cp MD Perm R	MFP Current Plan Permanent Markdowns Retail.
MFP Cp MD Promo R	MFP Current Plan Promotional Markdowns Retail.
MFP Cp MD R	MFP Current Plan Total Markdowns (Clearance + Promotional + Regular) Retail.
MFP Cp Receipts C	MFP Current Plan Receipts Cost.
MFP Cp Receipts R	MFP Current Plan Receipts Retail.
MFP Cp Receipts U	MFP Current Plan Receipts Units.
MFP Cp Ttl Sls C	MFP Current Plan Total Sales Cost.
MFP Cp Sls Clr C	MFP Current Plan Clearance Sales Cost.
MFP Cp Sls Clr R	MFP Current Plan Clearance Sales Retail.
MFP Cp Sls Clr U	MFP Current Plan Clearance Sales Units.
MFP Cp Sales Net VAT R	MFP Current Plan Sales Net Value Added Tax Retail.
MFP Cp Sls Promo C	MFP Current Plan Promotional Sales Cost.
MFP Cp Sls Promo R	MFP Current Plan Promotional Sales Retail.
MFP Cp Sls Promo U	MFP Current Plan Promotional Sales Units.
MFP Cp Ttl Sls R	MFP Current Plan Total Sales Retail.
MFP Cp Sls Reg C	MFP Current Plan Regular Sales Cost.
MFP Cp Sls Reg R	MFP Current Plan Regular Sales Retail.
MFP Cp Sls Reg U	MFP Current Plan Regular Sales Units.
MFP Cp Ttl Sls U	MFP Current Plan Total Sales Units.
MFP Op BOP Inv C	MFP Original Plan Beginning of Period Inventory Cost.
MFP Op BOP Inv R	MFP Original Plan Beginning of Period Inventory Retail.
MFP Op BOP Inv U	MFP Original Plan Beginning of Period Inventory Units.
MFP Op COGS C	MFP Original Plan Cost of Goods Sold Cost.
MFP Op EOP Inv C	MFP Original Plan End of Period Inventory Cost.
MFP Op EOP Inv R	MFP Original Plan End of Period Inventory Retail.
MFP Op EOP Inv U	MFP Original Plan End of Period Inventory Units.
MFP Op GM	MFP Original Plan Gross Margin.
MFP Op MD Clr R	MFP Original Plan Clearance Markdowns Retail.
MFP Op MD Perm R	MFP Original Plan Permanent Markdowns Retail.
MFP Op MD Promo R	MFP Original Plan Promotional Markdowns Retail.
MFP Op MD R	MFP Original Plan Total Markdowns (Clearance + Promotional + Regular) Retail.
MFP Op Receipts C	MFP Original Plan Receipts Cost.

Table 11–4 (Cont.) MFP Measures View Measures

Measure	Description
MFP Op Receipts R	MFP Original Plan Receipts Retail.
MFP Op Receipts U	MFP Original Plan Receipts Units.
MFP Op Ttl Sls C	MFP Original Plan Total Sales Cost.
MFP Op Sls Clr C	MFP Original Plan Clearance Sales Cost.
MFP Op Sls Clr R	MFP Original Plan Clearance Sales Retail.
MFP Op Sls Clr U	MFP Original Plan Clearance Sales Units.
MFP Op Sales Net VAT R	MFP Original Plan Sales Net Value Added Tax Retail.
MFP Op Sls Promo C	MFP Original Plan Promotional Sales Cost.
MFP Op Sls Promo R	MFP Original Plan Promotional Sales Retail.
MFP Op Sls Promo U	MFP Original Plan Promotional Sales Units.
MFP Op Ttl Sls R	MFP Original Plan Total Sales Retail.
MFP Op Sls Reg C	MFP Original Plan Regular Sales Cost.
MFP Op Sls Reg R	MFP Original Plan Regular Sales Retail.
MFP Op Sls Reg U	MFP Original Plan Regular Sales Units.
MFP Op Ttl Sls U	MFP Original Plan Total Sales Units.

