

## **Oracle® Retail Item Planning**

User Guide for the RPAS Fusion Client

Release 13.4

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Oracle Retail Item Planning User Guide for the RPAS Fusion Client, Release 13.4

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# Preface

This guide describes the Item Planning 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. This includes merchandisers, buyers, business analysts, and administrative personnel.

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- *Oracle Retail Item Planning Installation Guide*
- *Oracle Retail Item Planning Operations Guide*
- *Oracle Retail Item Planning Release Notes*
- *Oracle Retail Item Planning User Guide for the RPAS Classic Client*
- Oracle Retail Predictive Application Server documentation

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

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

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

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

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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/technology/documentation/oracle\\_retail.html](http://www.oracle.com/technology/documentation/oracle_retail.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                                                                                                                                |
|------------------------|----------------------------------------------------------------------------------------------------------------------------------------|
| <b>boldface</b>        | Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.         |
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| <code>monospace</code> | Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter. |



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# Introduction

Oracle Retail Item Planning (IP) 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.

In 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

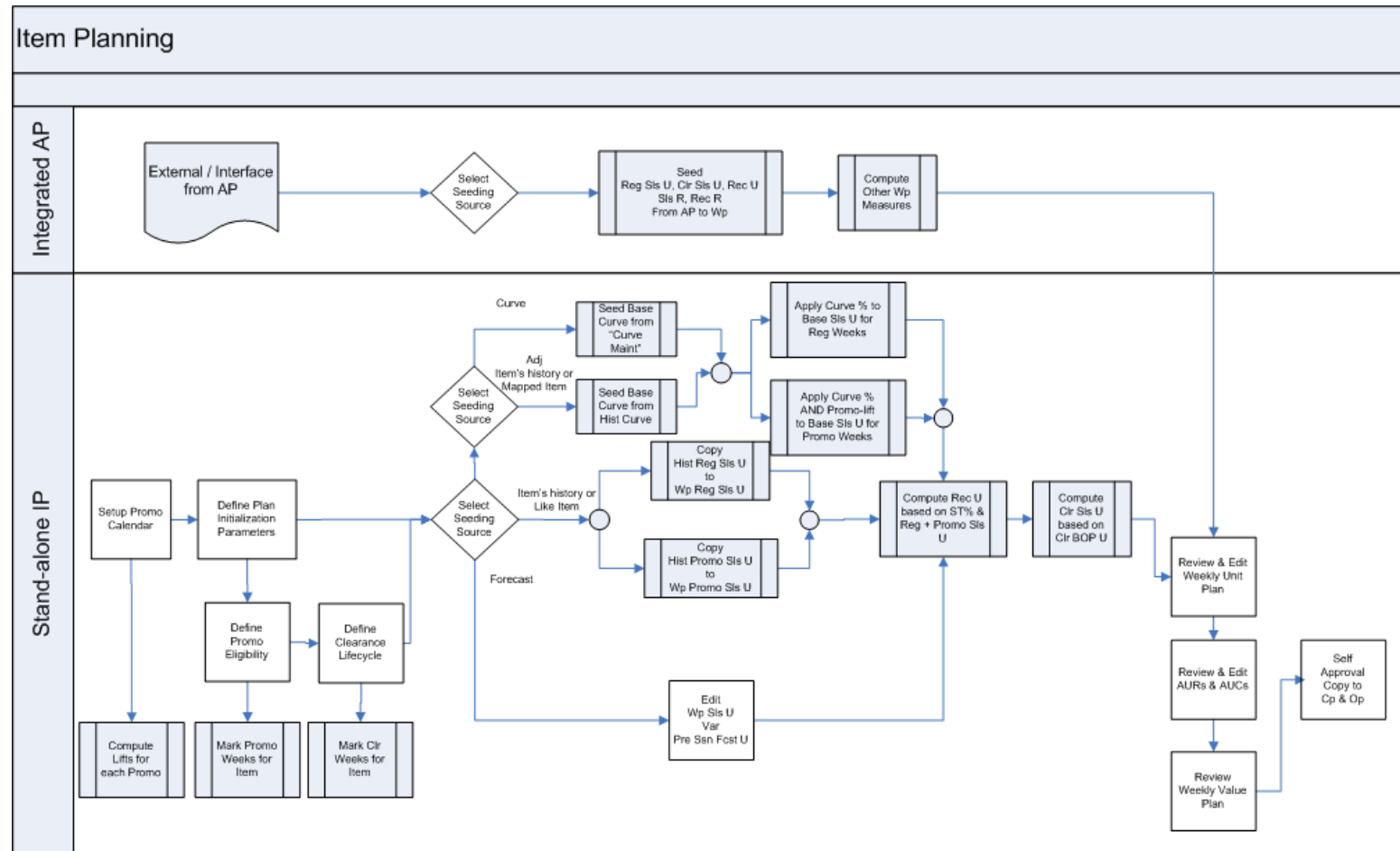
Once the plan period process has begun, in-season planning begins. The planner now uses the plan created in the preseason planning process as the benchmark for successful in-season planning. To begin the in-season planning process, the planner first manually reviews the factors that affect sales.

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.

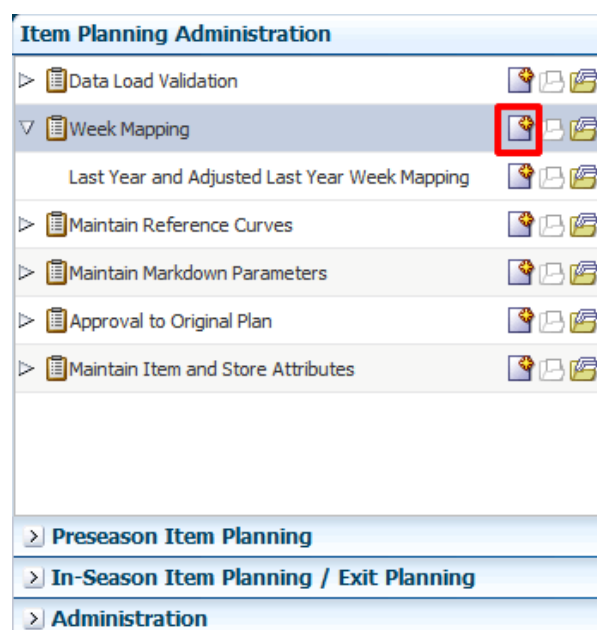
The Week Mapping task contains one step: [Last Year and Adjusted Last Year Week Mapping](#).

### Building the Week Mapping Workbook

To build a Week Mapping workbook:

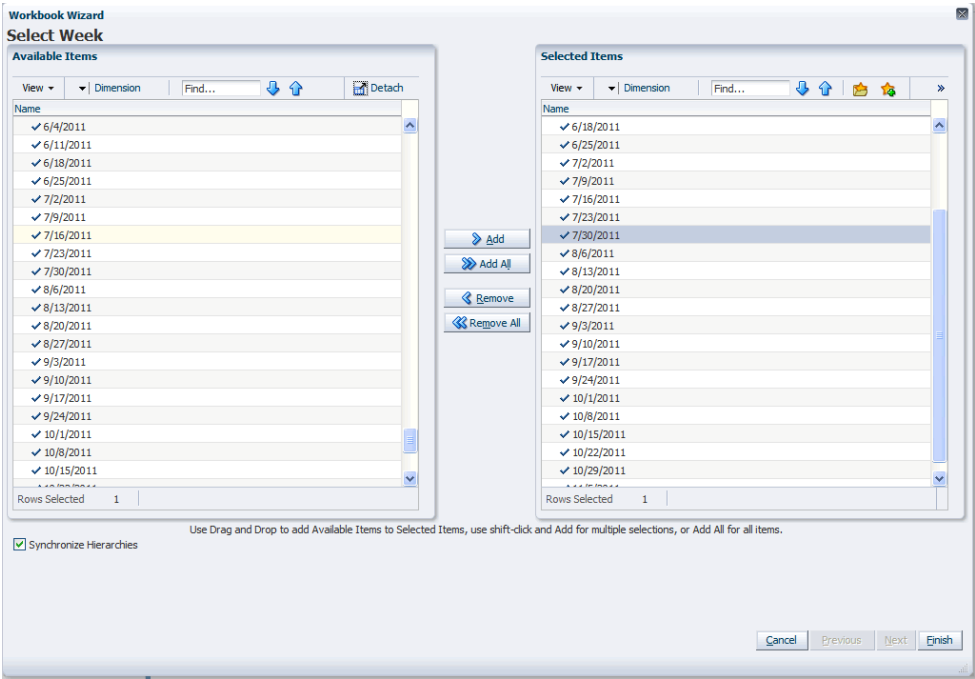
1. Click the **New Workbook** icon in the Week Mapping task.

**Figure 2–1 Week Mapping Task**



2. 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

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

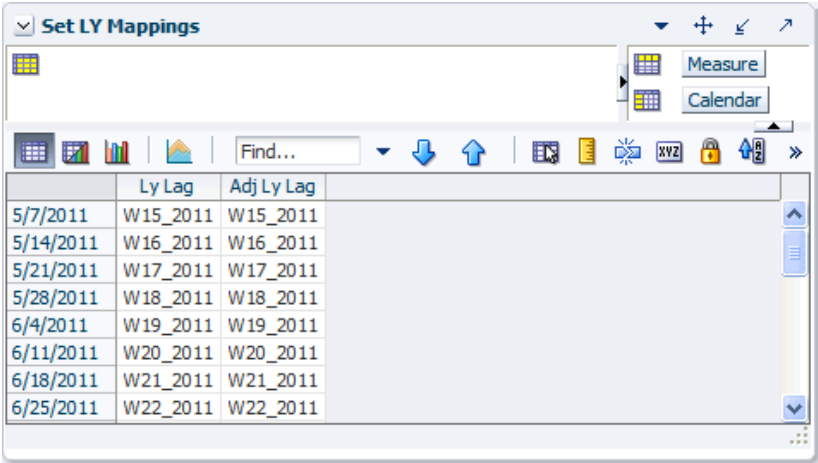


Table 2–1 Set LY Mappings View Measures

| Measure | Description                                        |
|---------|----------------------------------------------------|
| Ly Lag  | Identifies the week used for mapping as last year. |

**Table 2–1 (Cont.) Set LY Mappings View Measures**

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

## Maintain Reference Curves

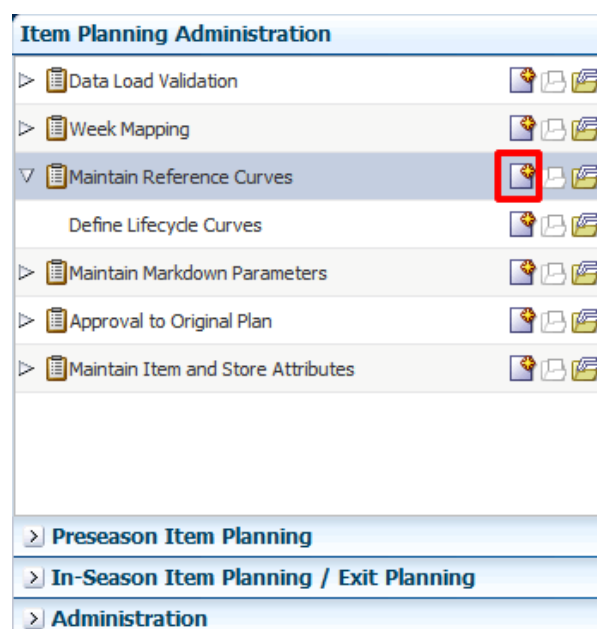
The Maintain Reference Curves task is used to create reference curves, which are used to spread unit sales to week in the [Develop and Approve Item Plans](#) task. Reference curves are based on percent-to-total sales, and they shrink or stretch to fit the defined regular or promotional sales period. 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](#) task.

### Building the Maintain Reference Curves Workbook

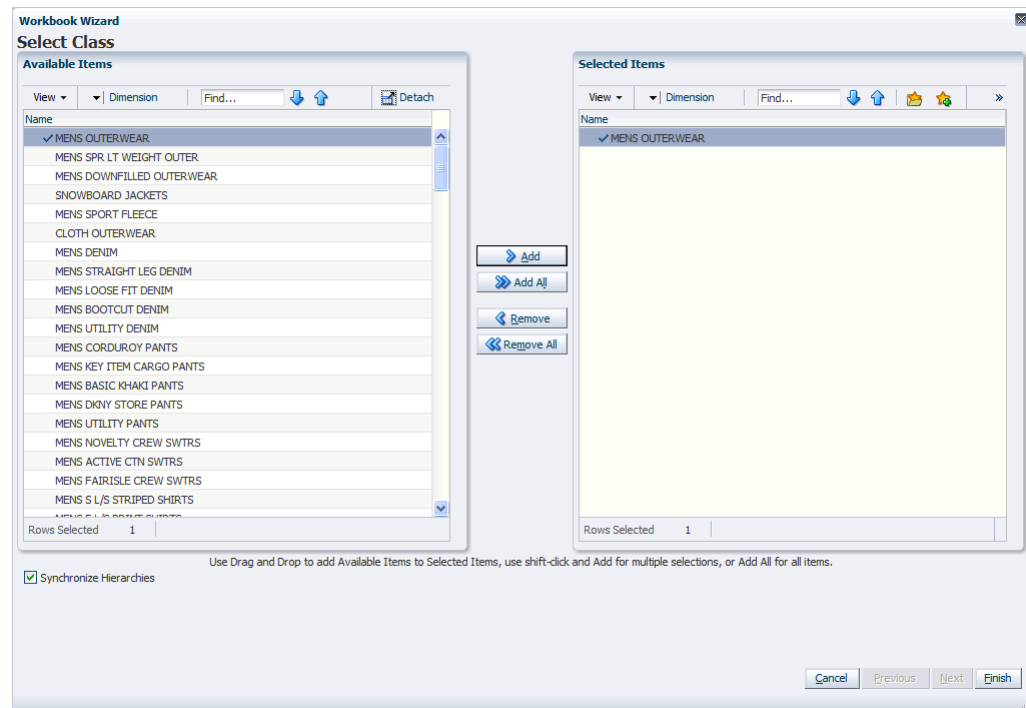
To build a Maintain Reference Curves workbook, perform the following steps:

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

**Figure 3–1** *Maintain Reference Curves Task*



2. The Maintain Reference Curves Workbook Wizard appears at the Select Class step. Select the classes you want to map and click **Finish**.

**Figure 3–2 Reference Curves Workbook 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**

|                    | Week 01 | Week 02 | Week 03 | Week 04 | Week 05 | Week 06 | Week 07 | Week 08 | Week 09 | Week 10 | Week 11 | Week 12 | Week 13 | Week 14 | Week 15 |
|--------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Lifecycle Curve 01 | 2.1%    | 1.8%    | 1.7%    | 1.9%    | 1.8%    | 1.7%    | 2.3%    | 1.8%    | 1.9%    | 1.8%    | 1.9%    | 1.9%    | 2.0%    | 2.2%    | 2.0%    |
| Lifecycle Curve 02 |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
| Lifecycle Curve 03 | 10.0%   | 10.0%   | 10.0%   | 10.0%   | 10.0%   | 10.0%   | 10.0%   | 10.0%   | 10.0%   | 10.0%   |         |         |         |         |         |
| Lifecycle Curve 04 | 1.6%    | 3.2%    | 5.2%    | 10.2%   | 10.0%   | 9.3%    | 8.5%    | 7.7%    | 7.2%    | 6.9%    | 6.3%    | 6.3%    | 6.1%    | 5.9%    | 5.3%    |
| Lifecycle Curve 05 | 14.3%   | 11.6%   | 11.6%   | 11.6%   | 13.4%   | 12.5%   | 12.5%   | 12.5%   |         |         |         |         |         |         |         |
| Lifecycle Curve 06 | 37.0%   | 28.3%   | 18.5%   | 10.9%   | 4.3%    | 1.1%    |         |         |         |         |         |         |         |         |         |
| Lifecycle Curve 07 | 31.2%   | 25.8%   | 19.4%   | 14.0%   | 7.5%    | 2.2%    |         |         |         |         |         |         |         |         |         |
| Lifecycle Curve 08 | 40.8%   | 30.6%   | 20.4%   | 8.2%    |         |         |         |         |         |         |         |         |         |         |         |

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] dimension, enter the label of the curve profile. This label is displayed in the Item Planning task.

- 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.

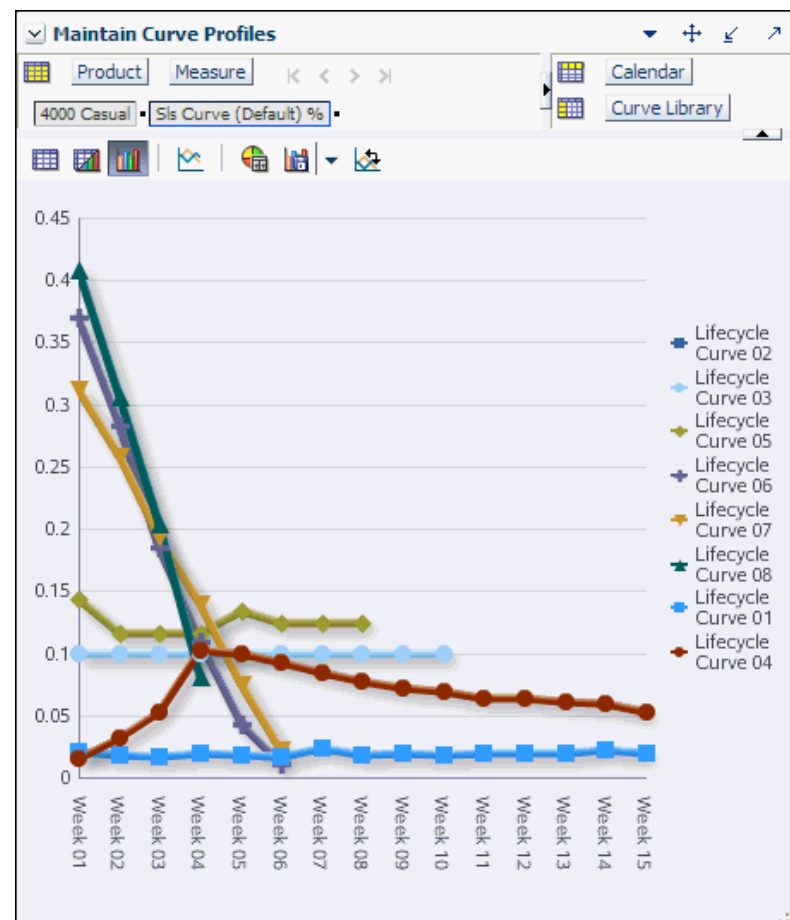
Table 3–1 lists the measures available on this view.

**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 Item Planning 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:

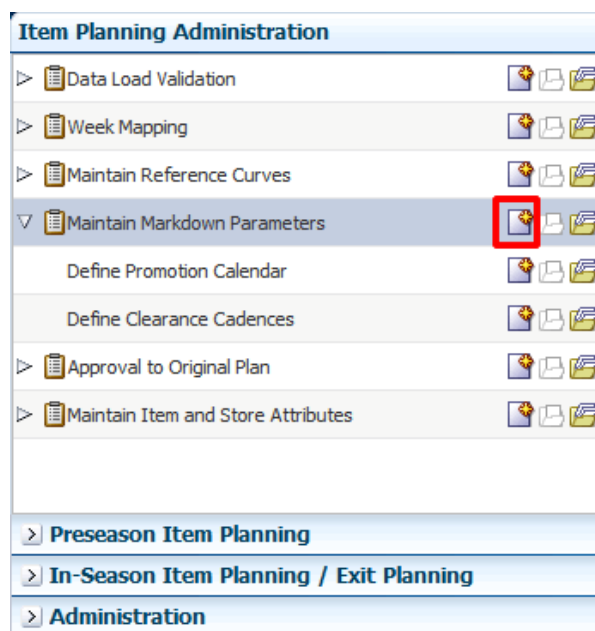
- [Define Promotion Calendar Step](#)
- [Define Clearance Cadences Step](#)

### Building the Maintain Markdown Parameters Workbook

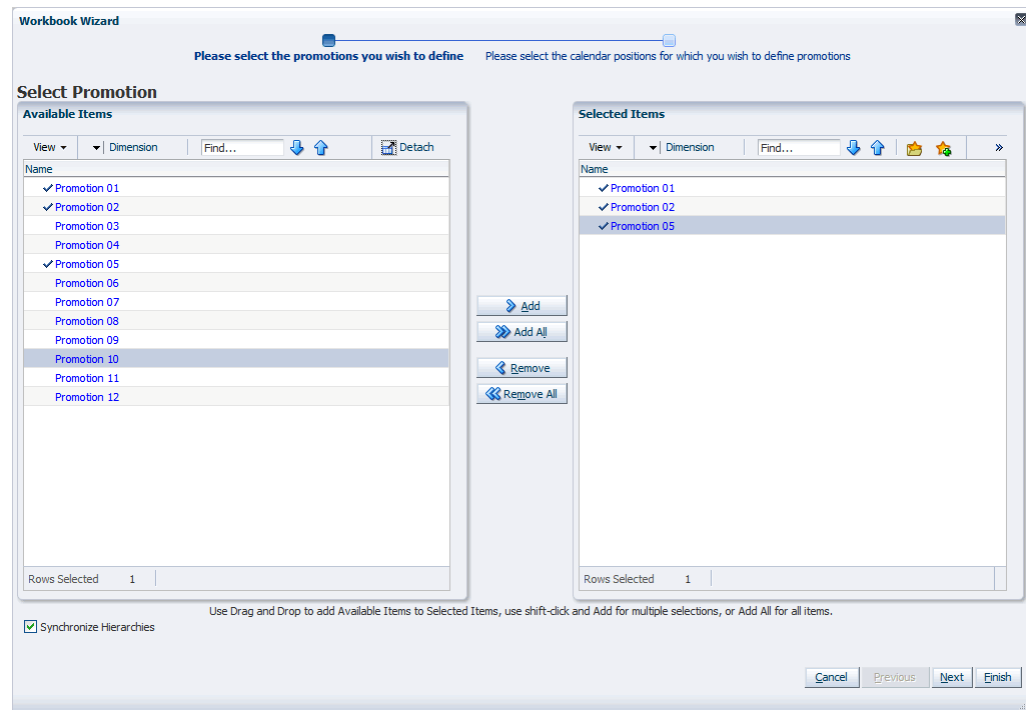
To build a Maintain Markdown Parameters workbook, perform the following steps:

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

**Figure 4–1** New Workbook Dialog Box

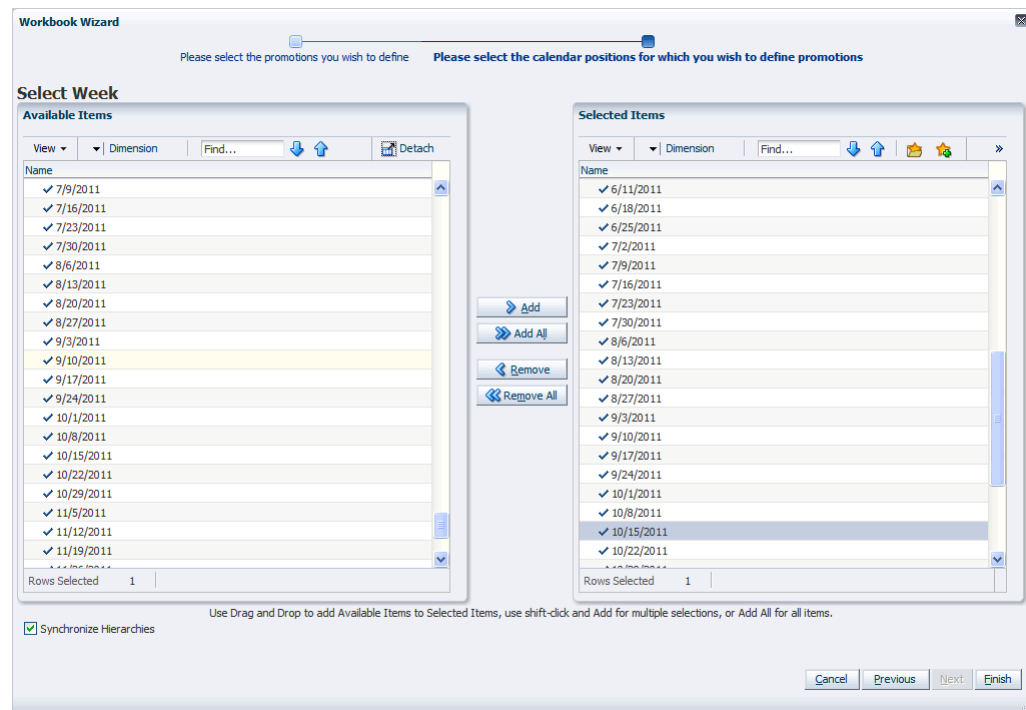


2. The Maintain Markdown Parameters Wizard appears at the Select Promotions step. If you have not previously set up promotions, only generic promotions are available for selection. Select the number of promotions you want to create and click **Next**.

**Figure 4–2 Markdown Parameters Wizard: Select Promotion**

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 Maintain Markdown Parameters workbook is built.

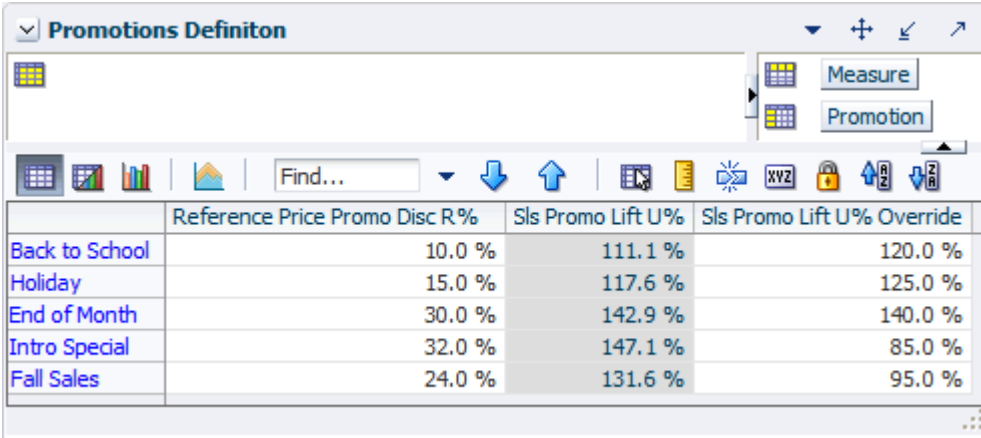
## Define Promotion Calendar Step

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 [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*

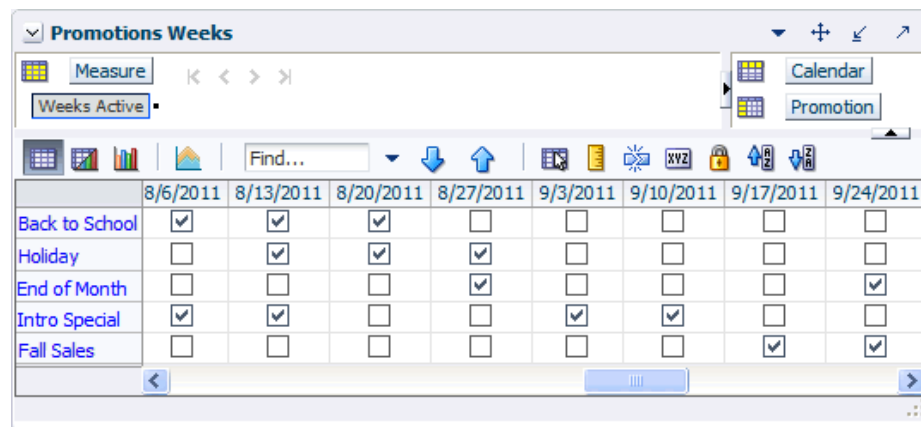
| Measure                       | Description                               |
|-------------------------------|-------------------------------------------|
| Reference Price Promo Disc R% | The discount percentage of the promotion. |

**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 <b>Calculate</b> . |
| 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:

**Table 4–2 Promotions Definition View Measure**

| Measure      | Description                                                                                                                                                                                                                                                                                                                                                     |
|--------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Weeks Active | Use this measure to select the weeks of the promotion.<br><br>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 Markdown Cadence step contains one view: Markdown Cadence.

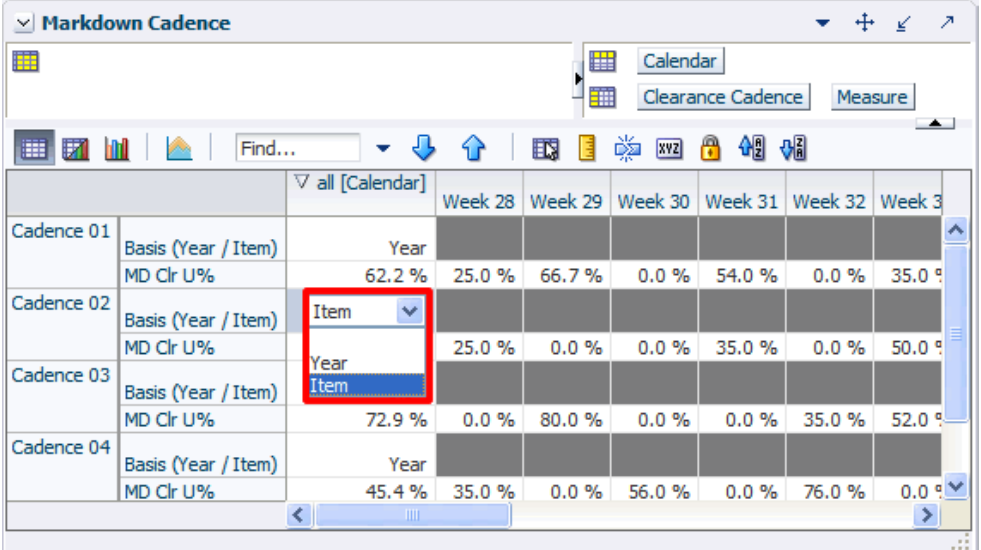
## Markdown Cadence View

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 are available for selection in the Dashboard view of the [Develop and Approve Item Plans](#) task.

Perform the following steps to define clearance cadences:

1. Ensure that all[Calendar] is shown in the Calendar dimension.
2. In the intersection of the Basis (Year/Item) measure and the all[Calendar] level, 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.

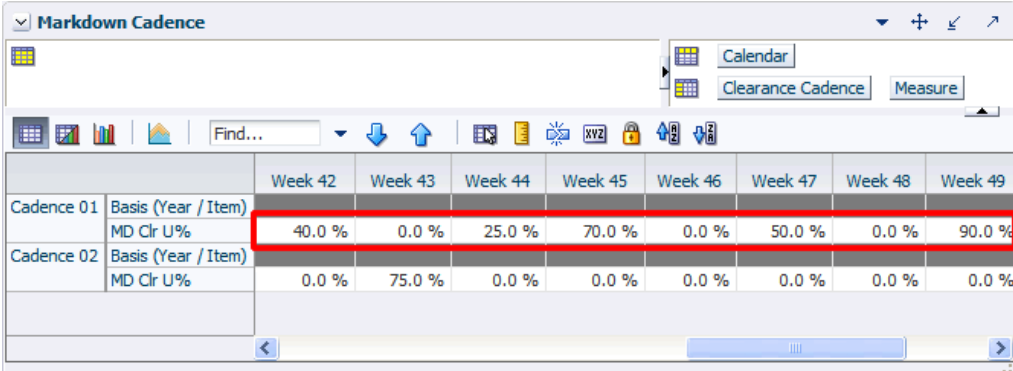
**Figure 4–6 Markdown Cadence: Basis (Year/Item) Selection View**



|            |                     | 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) | <p>The basis of the cadence. Options are year and item.</p> <ul style="list-style-type: none"> <li>■ <b>Year:</b> 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.</li> <li>■ <b>Item:</b> 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.</li> </ul> |
| MD Clr U%         | The markdown clearance percentage. This is applicable from the selected week onwards.                                                                                                                                                                                                                                                                                                                                      |

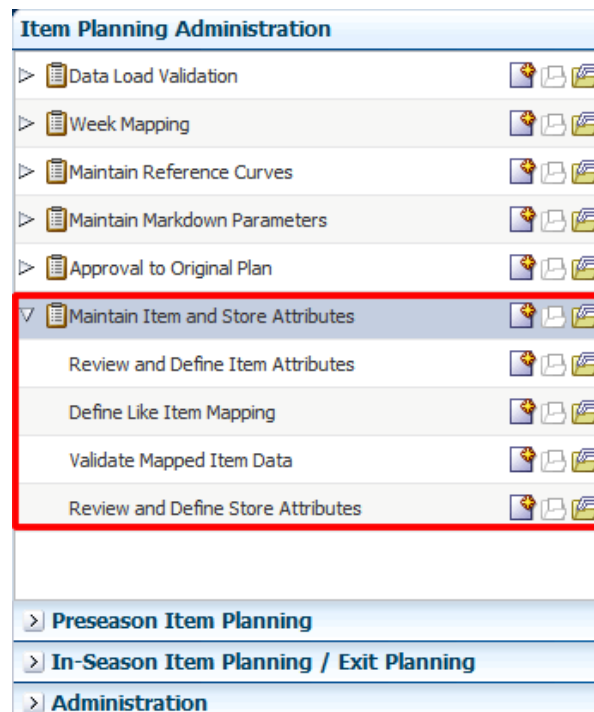
## Maintain Item and Store Attributes

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*

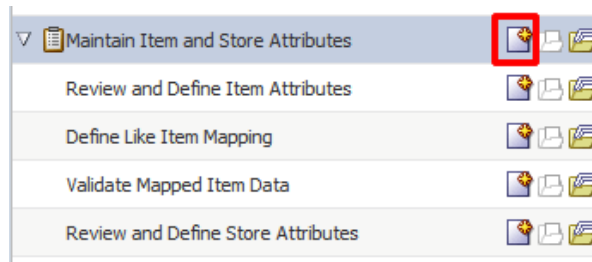


### Building the Maintain Item and Store Attributes Workbook

To build a Maintain Item and Store Attributes workbook:

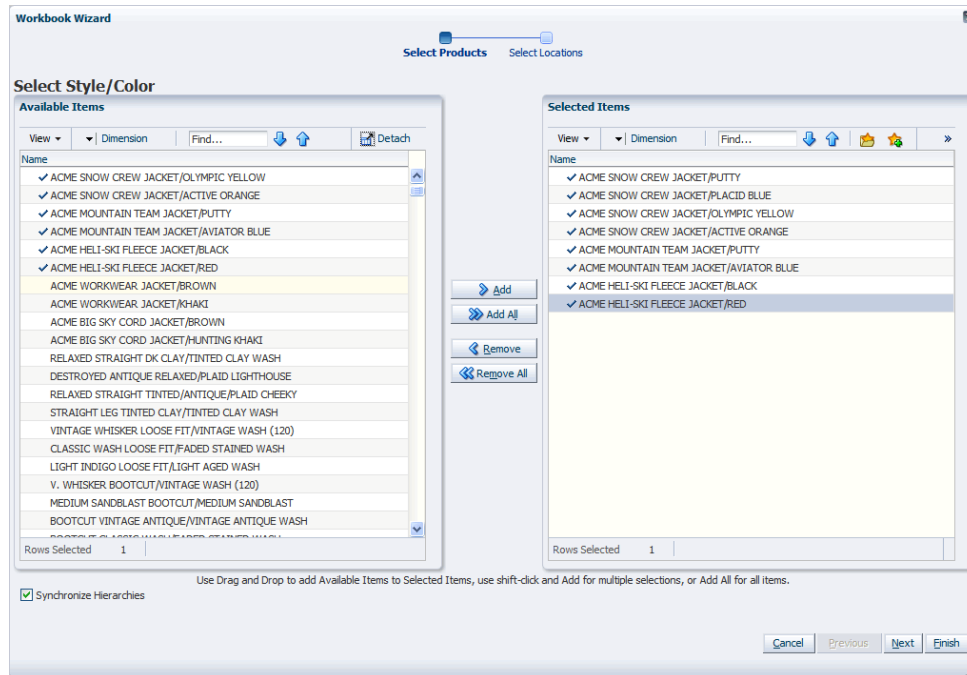
1. Click the **New Workbook** icon in the Maintain Item and Store Attributes task.

**Figure 5–2 Maintain Item and Store Attributes Steps**

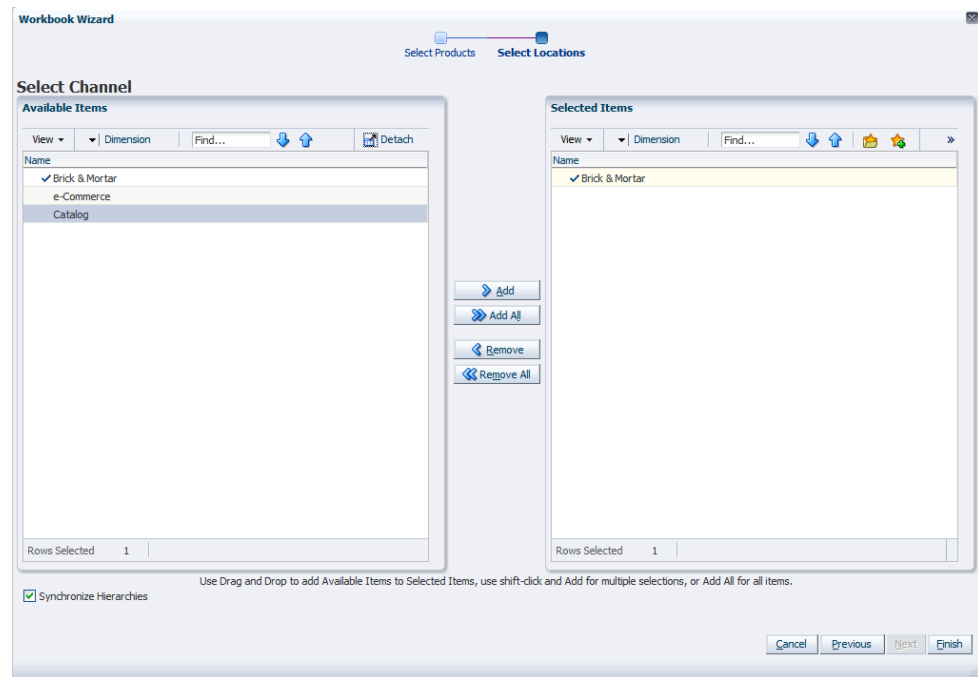


2. The Item and Store Maintenance wizard appears at the Select Style/Color step. Select the style/colors you want to map and click **Next**.

**Figure 5–3 Maintain Item and Store Attributes Wizard: Select Style/Color**



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

**Figure 5–4 Maintain Item and Store Attributes Wizard: Select Channel**

The workbook is built.

## Review and Define Item Attributes Step

This step contains one view: Review and Define Item Attributes. Use this view to see 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**

|                                        | 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.               |

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

| Measure     | Description                                                                                                   |
|-------------|---------------------------------------------------------------------------------------------------------------|
| Class       | Display attributes of the item. This is read-only.                                                            |
| 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.

- When finished mapping items, select the **Map Like Item** button in the upper right corner.

**Figure 5–7 Map Like Item Button**

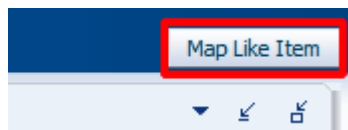


Table 5–2 describes the measures in this view.

**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 that you mapped in the [Define Like Item Mapping Step](#).

**Figure 5–8 Review Mapped Sales**

| 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.

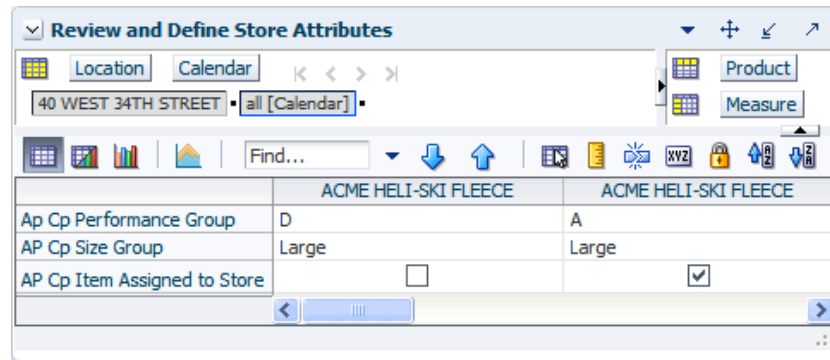
**Figure 5–9 Review and Define Store Attributes View**

Table 5–4 describes the measures in this view.

**Table 5–4 Review and Define Store Attributes Measures**

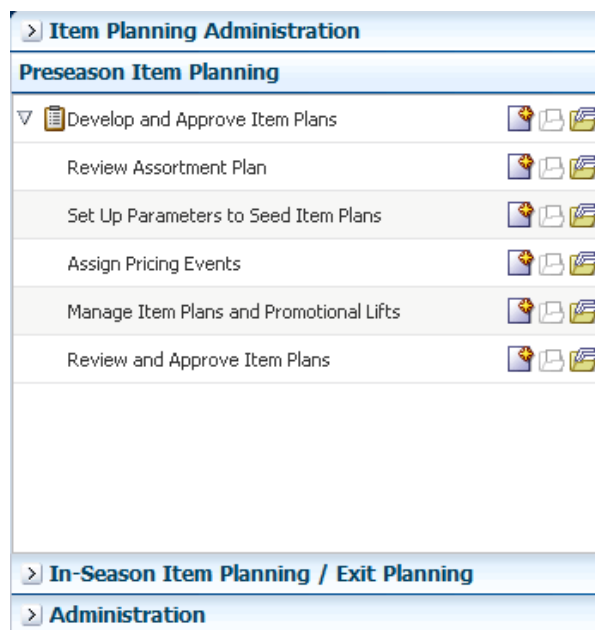
| Measure                      | Description                                                                                                                                                                                                                                                                                                                                                                 |
|------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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.                                                                                                                                                                                                                                                                                        |

## 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](#)

**Figure 6–1** *Develop and Approve Item Plans Task*



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](#).

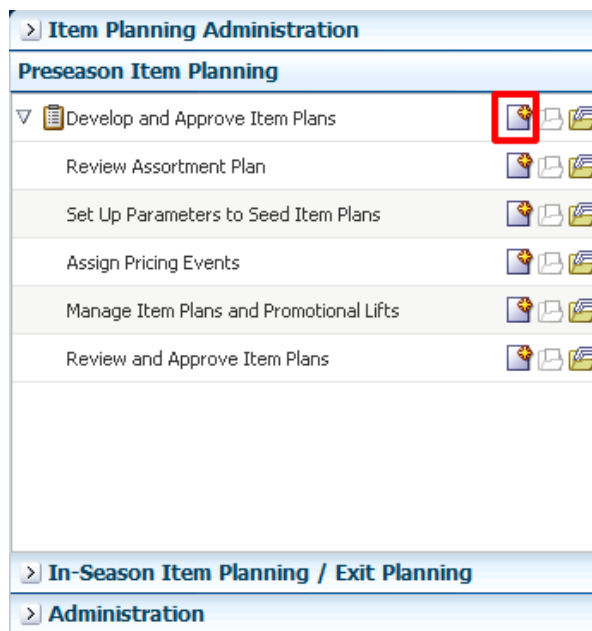
This process is described in detail throughout this chapter.

## 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 6–2 New Workbook Dialog Box**

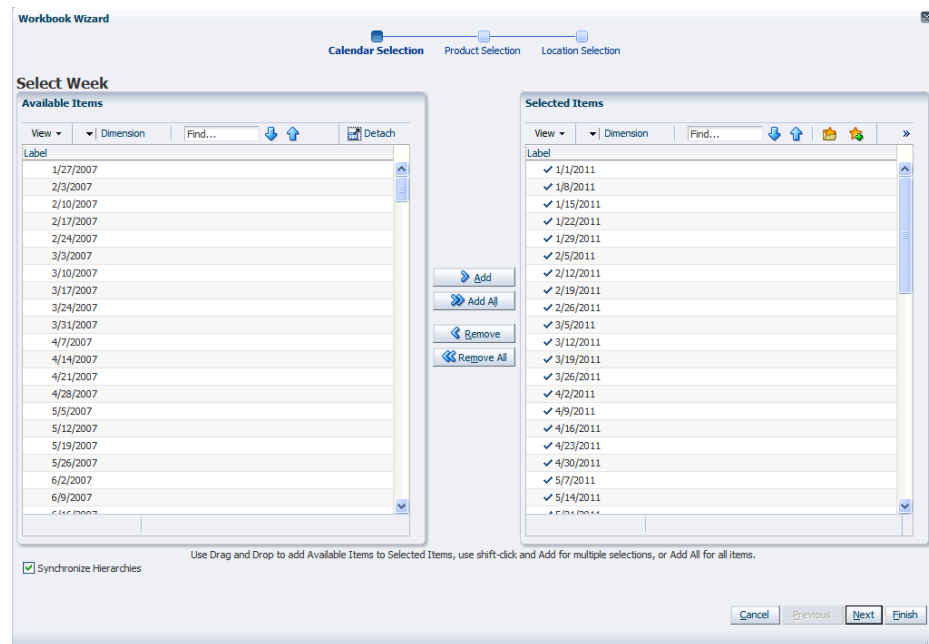


2. The workbook wizard opens at the Calendar Selection step. Select the weeks that you want to plan. Click **Next**.

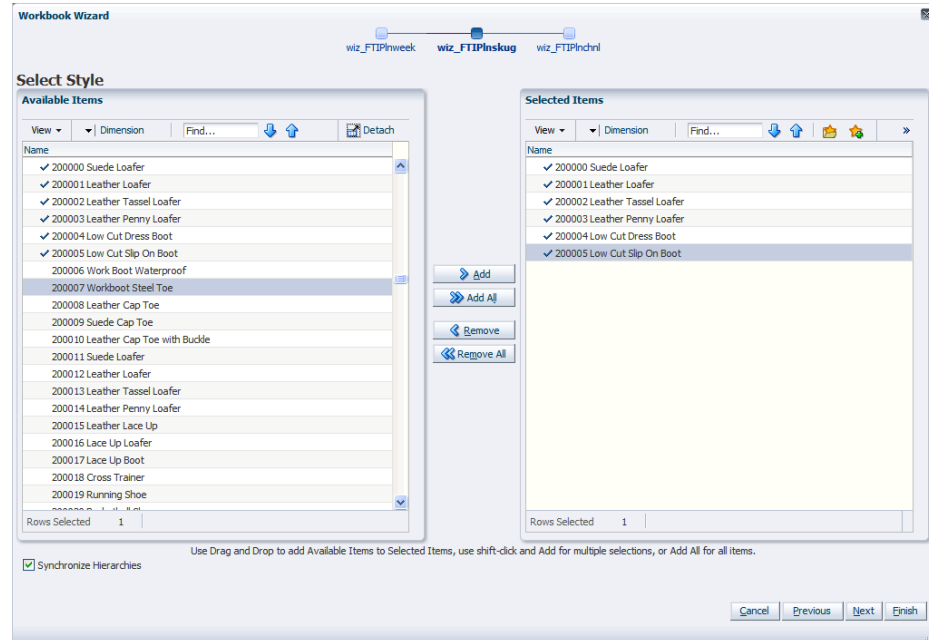
---

**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.

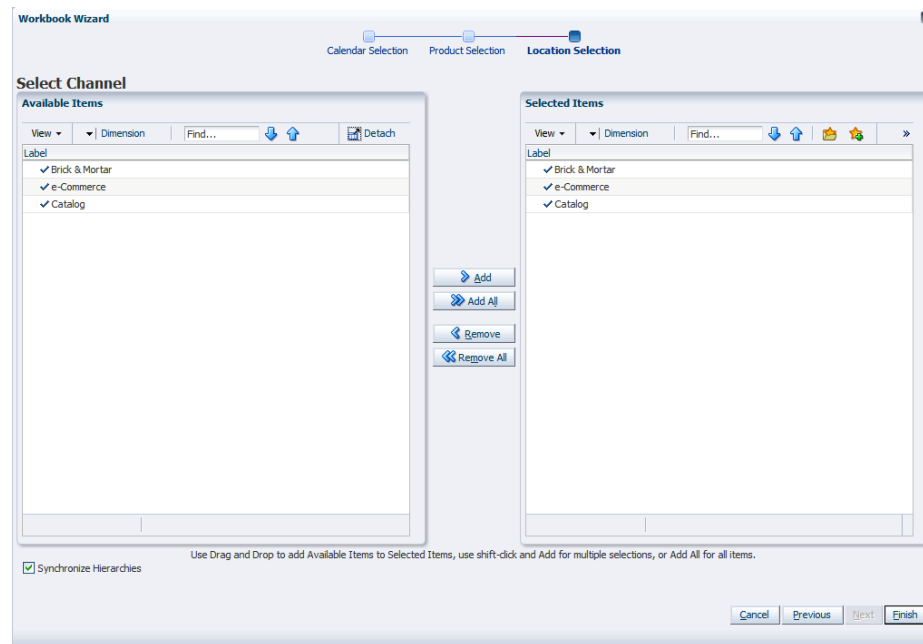
---

**Figure 6–3 Workbook Wizard: Calendar Selection**

3. The Product Selection step of the workbook wizard appears. Select the styles you want to plan. Click **Next**.

**Figure 6–4 Workbook Wizard: Product Selection**

4. The Location Selection step of the workbook wizard appears. Select the channels you want to plan. Click **Finish**.

**Figure 6–5 Workbook Wizard: Location Selection**

The 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 6–6 Assortment Plan Parameters View**

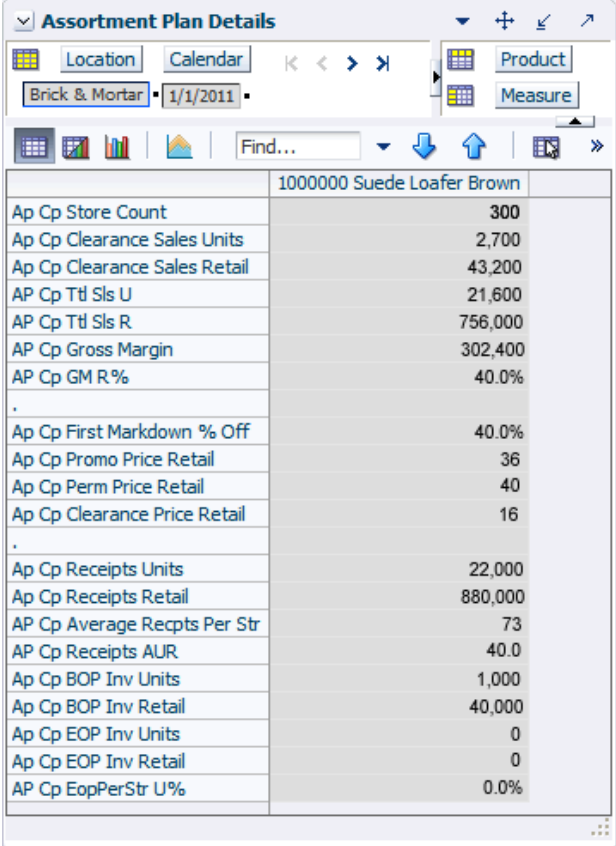
| Assortment Plan Parameters         |                            |                            |
|------------------------------------|----------------------------|----------------------------|
| Location: Brick & Mortar           |                            |                            |
| Product: Suede Loafer              |                            |                            |
| Measure: Brown                     |                            |                            |
|                                    | 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 6–1 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 6–7 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 6–2 lists the measures available on this view.

**Table 6–2 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 this 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 6–8 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 6–3 lists the measures available on this view.

**Table 6–3 Reference Curves View Measures**

| Measure                | Description                                                                                                                              |
|------------------------|------------------------------------------------------------------------------------------------------------------------------------------|
| Sales Curve Label      | Displays the label for the lifecycle curve. This label is created in the <a href="#">Maintain Reference Curves</a> task.                 |
| Sales Curve (Default)% | Displays percent-to-total sales percentage in the weeks of the curve. This is set in the <a href="#">Maintain Reference Curves</a> 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 6–9 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 6–10](#)) below.

**Figure 6–10 Item Plan Parameters - Markdown Parameters Measure Profile**

|                      | Brick & Mortar | Catalog    | e-Commerce |
|----------------------|----------------|------------|------------|
| # Stores             | 100            | 100        | 100        |
| 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 %     |

## 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:** This option is used only in the Item Planning Configured for COE application.

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 6–11 Seed View**

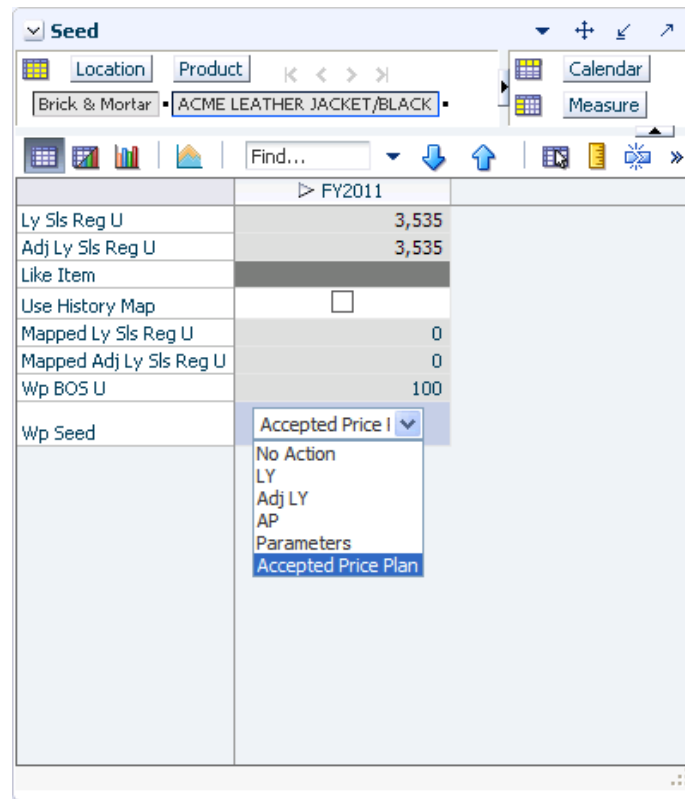


Table 6–4 lists the measures available on this view.

**Table 6–4 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 <a href="#">Maintain Item and Store Attributes</a> task.                              |
| Use History Map         | Select this option to use the history of the style that you mapped the current style to in the <a href="#">Maintain Item and Store Attributes</a> 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.                                                                                     |

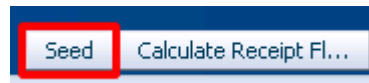
**Table 6–4 (Cont.) Seed View Measures**

| Measure  | Description                                                                                         |
|----------|-----------------------------------------------------------------------------------------------------|
| 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. |

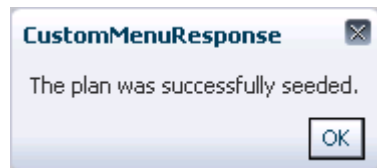
### Seeding the Plan

To seed the plan, perform the following steps:

1. Roll the calendar 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 6–12 Seed Button**

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

**Figure 6–13 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:

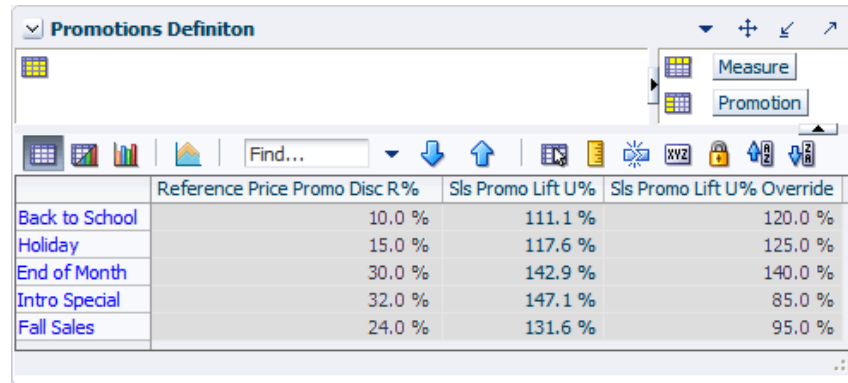
- [Promotions Definition View](#)
- [Promotions Weeks View](#)
- [Promo Mapping View](#)
- [Markdown Cadence View](#)

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 6–14 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 6–5 lists the measures available on this view.

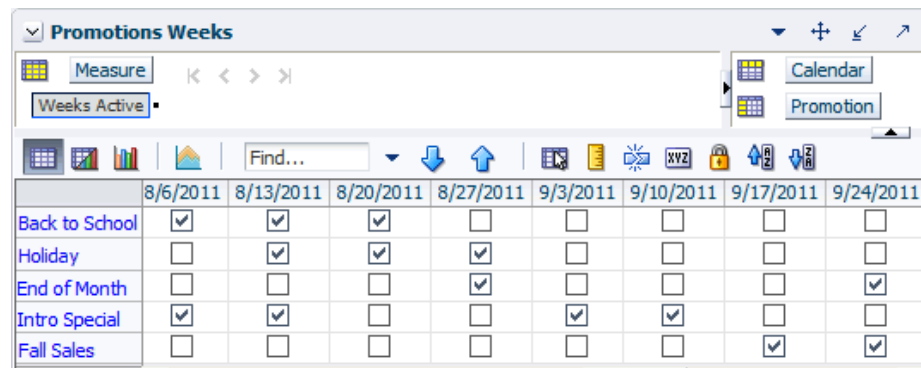
**Table 6–5 Promotions Definition View Measures**

| 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 6–15 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 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Holiday        | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| End of Month   | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| Intro Special  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Fall Sales     | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

## 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 6–16** *Promo Mapping View*

|                | 1000000 Suede                       | 1000001 Suede                       | 1000002 Suede                       | 1000003 Leather                     | 1000004 Leather                     |
|----------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Back to School | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| Holiday        | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| End of Month   | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Intro Special  | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| Fall Sales     | <input type="checkbox"/>            | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            |

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 6–17** *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 6–6 lists the measures available on this view.

**Table 6–6    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. |
| 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 6–18 Item Plan View

Item Plan

LocationProduct

Brick & MortarACME LEATHER JACKET/BLACK

CalendarMeasure

Find...

## 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 6–19 Promo Details View**

|                 | Wp Sls Promo Eligibility            | Wp Promo Lift U | Wp Baseline Sales U | Wp Sls Promo U |
|-----------------|-------------------------------------|-----------------|---------------------|----------------|
| all [Promotion] | <input checked="" type="checkbox"/> | 896             | 3,465               | 4,361          |
| all [Calendar]  | <input checked="" type="checkbox"/> |                 |                     |                |
| 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              |

**Figure 6–20 Promo Detail View for Back to School Promotion**

|                | Wp Sls Promo Eligibility            | Wp Promo Lift U | Wp Baseline Sales U | Wp Sls Promo U |
|----------------|-------------------------------------|-----------------|---------------------|----------------|
| Back to School | <input checked="" type="checkbox"/> | 896             | 3,465               | 4,361          |
| all [Calendar] | <input checked="" type="checkbox"/> |                 |                     |                |
| 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              |

**Figure 6–21 Promo Details View for the Fall Sales Promotion**

|                | Wp Sls Promo Eligibility            | Wp Promo Lift U | Wp Baseline Sales U | Wp Sls Promo U |
|----------------|-------------------------------------|-----------------|---------------------|----------------|
| all [Calendar] | <input checked="" type="checkbox"/> | 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 6–7 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.                                                                                           |

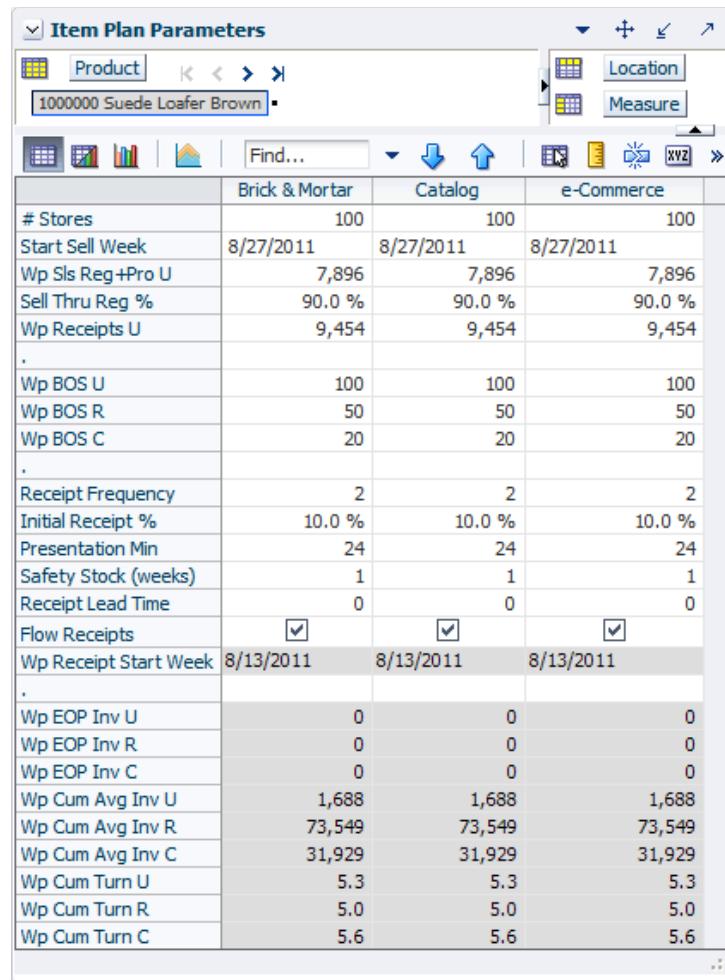
Once you are satisfied with the sales plan, return to the [Set Up Parameters to Seed Plan Task: Receipt and Inventory Plan](#) to create the receipt and inventory plan.

## 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 6–22 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         | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| 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 6–23 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 6–8 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.                                                                                                                                               |
| 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.                                                                                                                                 |

**Table 6–8 (Cont.) Item Plan Parameters View - Receipt Parameters Measure Profile**

| Measure          | Description                                                                    |
|------------------|--------------------------------------------------------------------------------|
| 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.                |

## 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 6–24 Item Plan View: Receipts and Inventory Measure Profile**

Item Plan

LocationProduct

Brick & MortarACME LEATHER JACKET/BLACK

CalendarMeasure

Find...

all [Calendar]

Jun FY2011Jul FY2011Aug FY2011Sep FY2011Oct FY2011

Start Sell Week

8/27/2011

Ap Cp Receipts Units

0

0

0

0

0

0

Wp BOS U

100

Wp Ttl Sls U

8,866

620

2,711

3,825

1,025

415

Wp Receipts U

9,454

3,277

3,713

2,193

271

0

Wp Misc In U

0

0

0

0

0

0

Wp Misc Out U

0

0

0

0

0

0

Wp Shrink U

177

12

54

76

20

8

Wp EOP Inv U

0

2,745

3,692

1,984

1,209

786

Wp Cum Avg Inv U

1,688

1,843

2,373

2,430

2,219

1,985

Wp Cum Turn U

5.3

0.3

1.4

2.9

3.7

4.3

.

Wp BOS R

50

Wp Ttl Sls R

368,726

23,606

108,440

180,950

45,550

8,040

Wp Misc In R

0

0

0

0

0

0

Wp Misc Out R

0

0

0

0

0

0

Wp Shrink R

7,375

472

2,169

3,619

911

161

Wp MktUp R

0

0

0

0

0

0

Wp EOP Inv R

0

135,011

182,942

97,723

34,811

10,321

Wp Cum Avg Inv R

73,549

88,545

115,792

119,155

105,967

89,711

Wp Cum Turn R

5.0

0.3

1.1

2.6

3.4

4.1

.

Wp BOS C

20

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 Misc In C

0

0

0

0

0

0

Wp Misc Out C

0

0

0

0

0

0

Wp Shrink C

3,546

248

1,084

1,530

410

166

Wp Receipts C

189,080

65,540

74,260

43,860

5,420

0

Wp EOP Inv C

0

52,912

71,868

37,698

22,208

13,742

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 6–25 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 plan and receipts and inventory plan, 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: [Item Plan 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 6–26 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         |                |            |            |            |            |            |
| Wp Sales Net VAT var MFP Cp R% |                |            |            |            |            |            |
| Wp Gross Profit                | 191,406        | 11,206     | 54,220     | 104,450    | 25,050     | -260       |
| MFP Cp Gross Profit            |                |            |            |            |            |            |
| 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 %          |                |            |            |            |            |            |
| Wp Receipts C                  | 189,080        | 65,540     | 74,260     | 43,860     | 5,420      | 0          |
| MFP Cp Receipts C              |                |            |            |            |            |            |
| Wp EOP Inv C                   | 0              | 52,912     | 71,868     | 37,698     | 22,208     | 13,742     |
| MFP Cp EOP Inv C               |                |            |            |            |            |            |
| Wp Cum Avg Inv C               | 31,929         | 34,876     | 45,477     | 46,625     | 42,407     | 37,721     |
| MFP Cp Cum Avg Inv C           |                |            |            |            |            |            |
| Wp Cum Turn C                  | 5.6            | 0.4        | 1.5        | 3.1        | 3.9        | 4.6        |
| MFP Cp Cum Turn C              |                |            |            |            |            |            |

## 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.

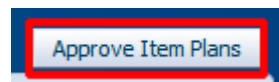
To approve the plans, perform the following steps:

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.

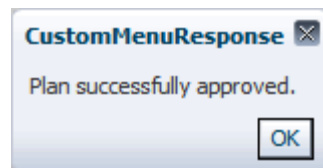
**Figure 6–27 Plan Approval View**

|                           | 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 6–28](#).

**Figure 6–28 Approve Item Plans Button**

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

**Figure 6–29 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 6–30](#)).

**Figure 6–30 Approved Plans**

|                           | 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 6–9 lists the measures available on this view.

**Table 6–9 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 6–31 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*.

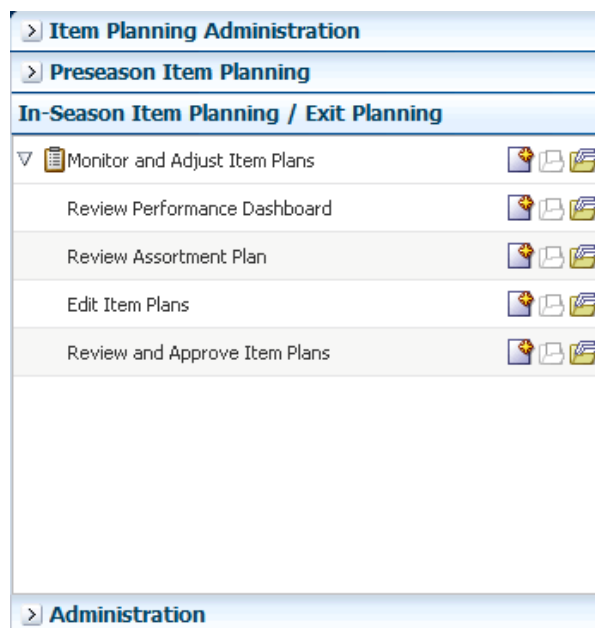
## Monitor and Adjust Item Plans

Use the Monitor and Adjust Item Plans task to adjust the item plan after the season has started. This task has four steps:

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

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

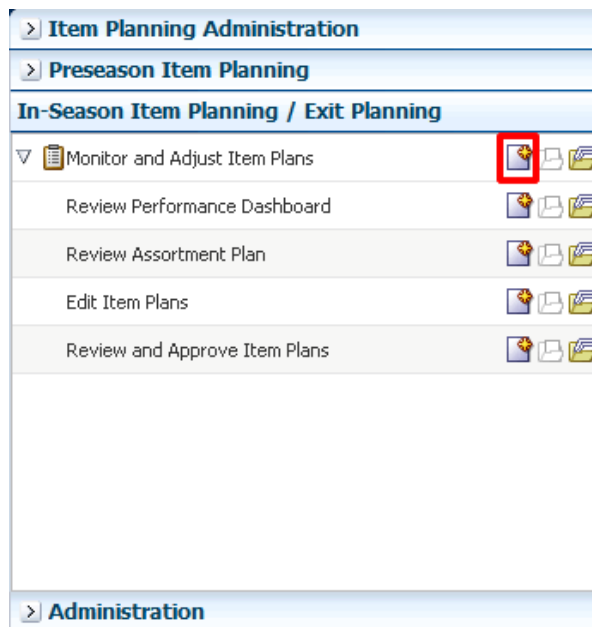
**Figure 7-1** Monitor and Adjust Item Plans Task



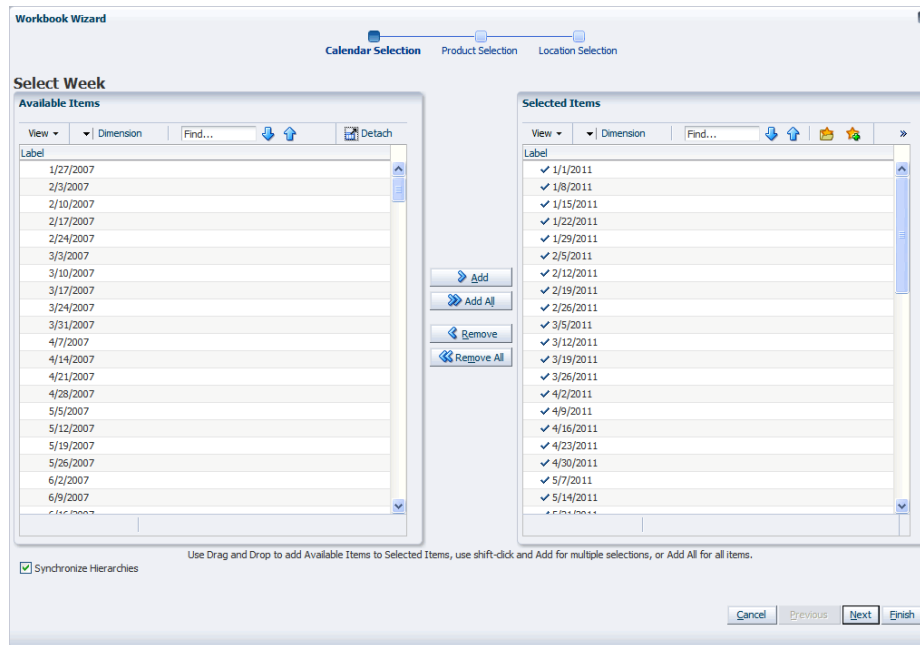
### Building the Monitor and Adjust Item Plans Workbook

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

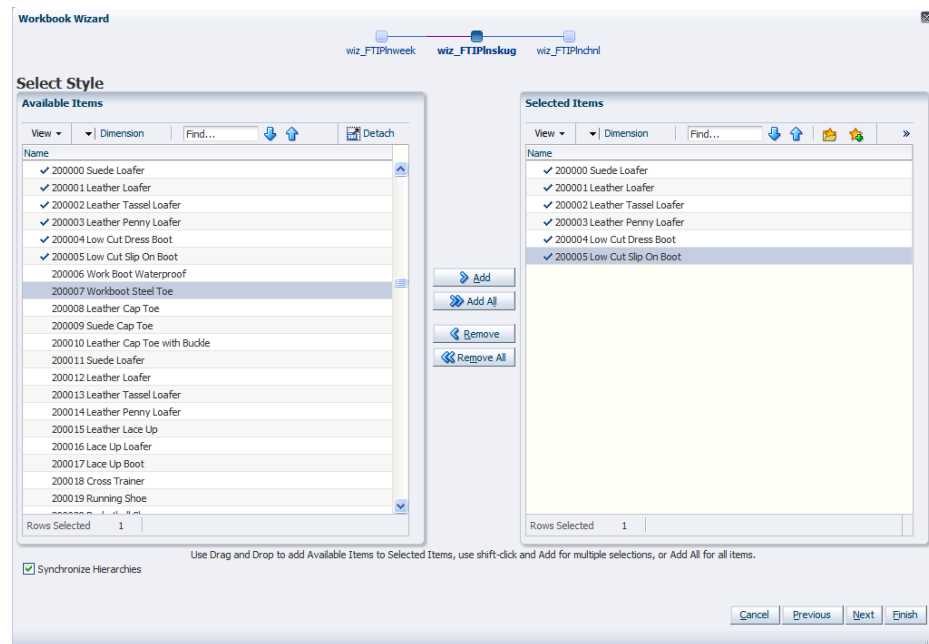
1. Click the **Create New Workbook** icon in the Monitor and Adjust Item Plans task.

**Figure 7–2 New Workbook Dialog Box**

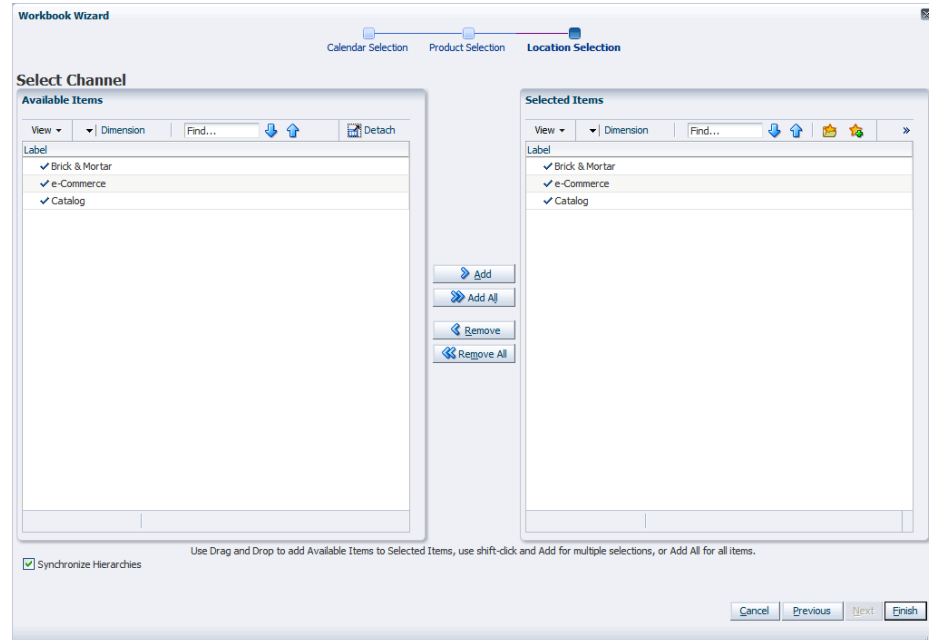
2. The workbook wizard opens at the Calendar Selection step. Select the weeks that you want to plan. Click **Next**.

**Figure 7–3 Workbook Wizard: Calendar Selection**

3. The Product Selection step of the workbook wizard appears. Select the styles you want to plan. Click **Next**.

**Figure 7–4 Workbook Wizard: Product Selection**

4. The Location Selection workbook of the workbook wizard appears. Select the channels you want to plan. Click **Finish**.

**Figure 7–5 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:

- [Dashboard View](#)
- [Bounds 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 7–6 Dashboard View**

The screenshot shows the 'Dashboard' window with filters for 'Location' (Brick & Mortar) and 'Product' (ACME LEATHER JACKET/BLACK). The table displays various measures across three columns: 01. Total, 02. Total, and 03. Total Act/Proj diff to Total Plan. The measures include 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 7–1 lists the measures available on this view.

**Table 7–1 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 7-1 (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 7-7 Bounds View**

The screenshot shows the 'Bounds' window in a software application. At the top, there are tabs for 'Location' and 'Product'. The 'Location' tab is selected, showing 'Brick & Mortar'. The 'Product' tab is also selected, showing 'ACME LEATHER JACKET/BLACK'. Below these tabs is a search bar labeled 'Find...'. To the right of the search bar are several icons, including a magnifying glass, a list, a chart, and a lock. Below the search bar 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 7-2 lists the measures available on this view.

**Table 7-2 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 7–2 (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

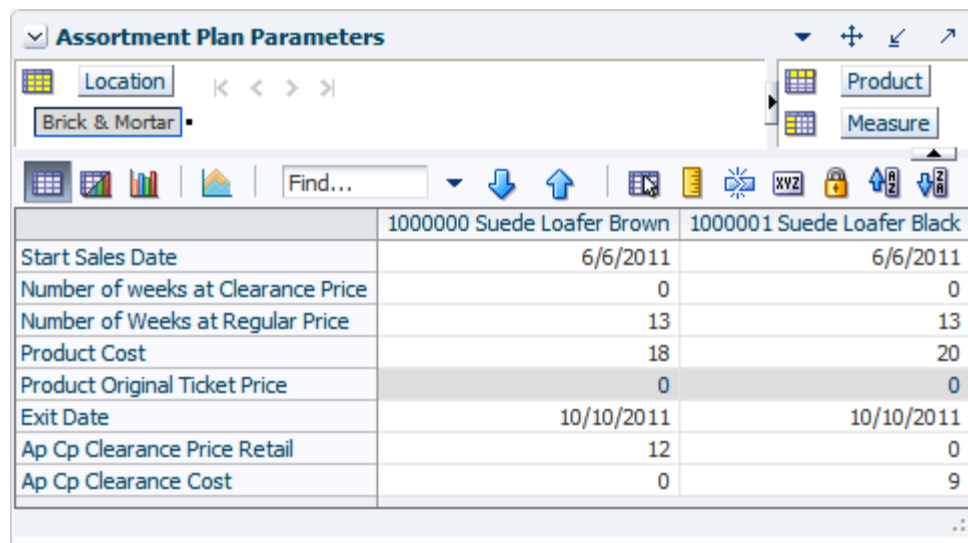
The Review Assortment Plan step has two views:

- [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 7–8 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 7–3 lists the measures available on this view.

**Table 7–3 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 7–9 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 7–4 lists the measures available on this view.

**Table 7–4 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 7–4 (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.

## Edit Item Plans Step

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

**Figure 7–10 Item Plan View**

|                      | 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 %    |

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 plan and receipts and inventory plan, 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.

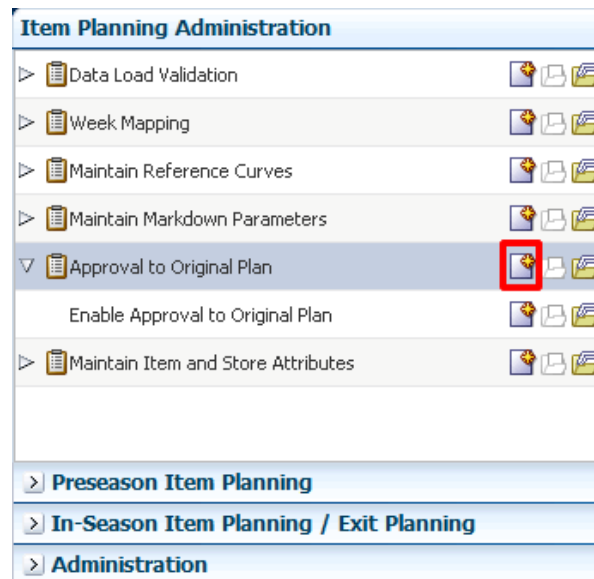
By default, the Op approval is set to enabled.

### Building the Approval to Original Plan Workbook

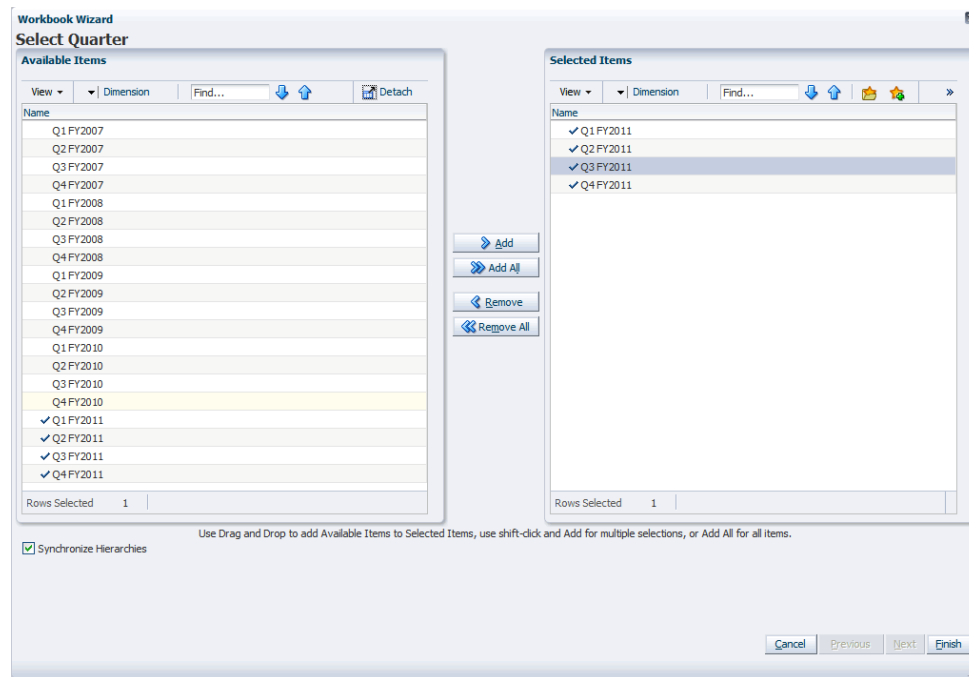
To build a new Approval to Original Plan workbook, perform the following steps:

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

**Figure 8–1 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**.

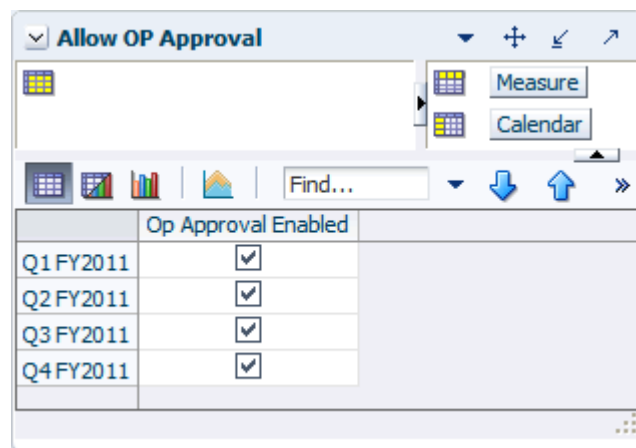
**Figure 8–2 Approval to Original Plan Workbook Wizard - Calendar Selection**

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 8–3 Allow OP Approval View**

The following table lists the measures available on this view.

**Table 8–1 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 Validation task contains all measures that are either loaded or touched during the batch calculation process. This task is used by the administrator only to verify the results of data loads and batch processes.

The Data Validation task contains the following steps:

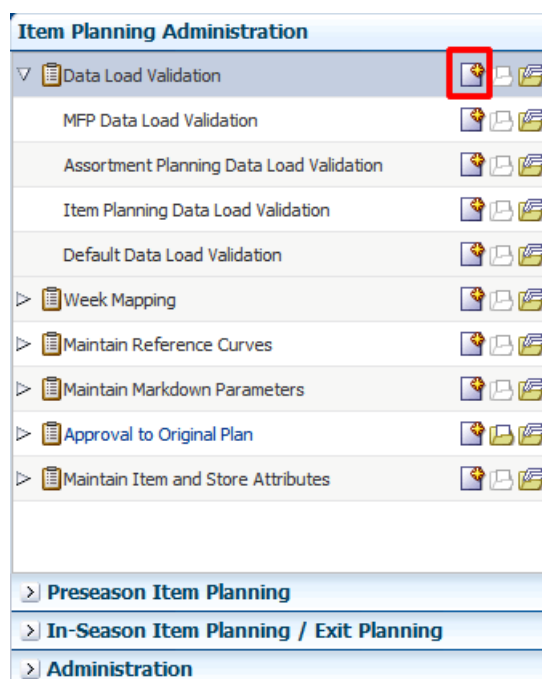
- [Assortment Planning Measures View](#)
- [Default Measures View](#)
- [Item Planning Measures View](#)
- [MFP Measures View](#)

### Building the Data Validation Workbook

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

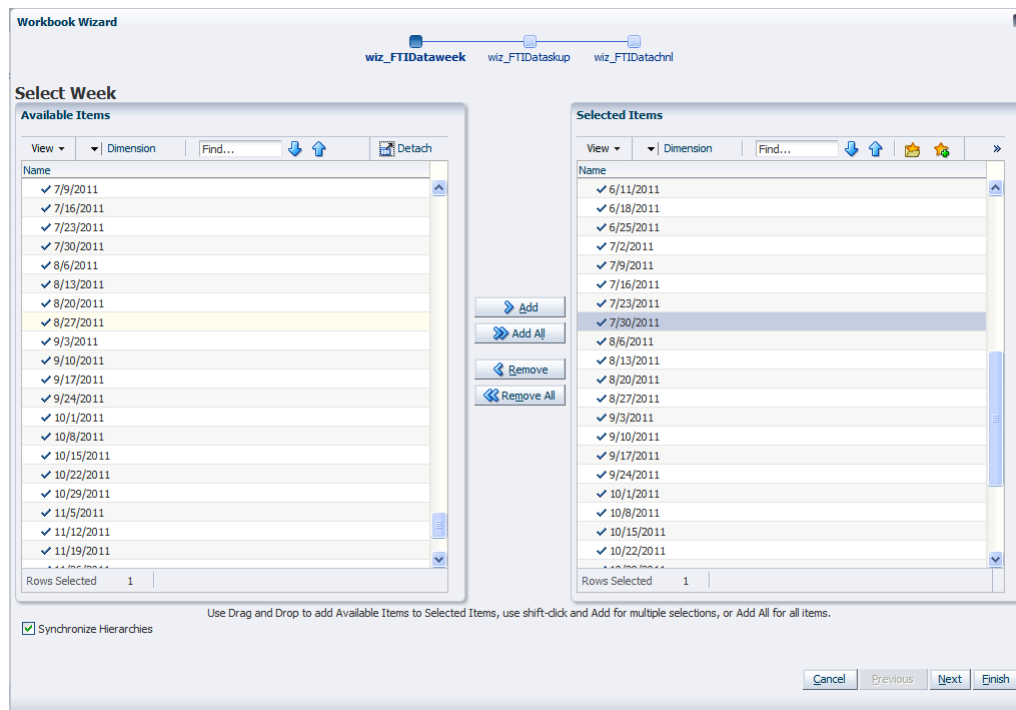
1. Click the **New Workbook** icon in the Data Validation step.

**Figure 9–1 Data Load Validation**



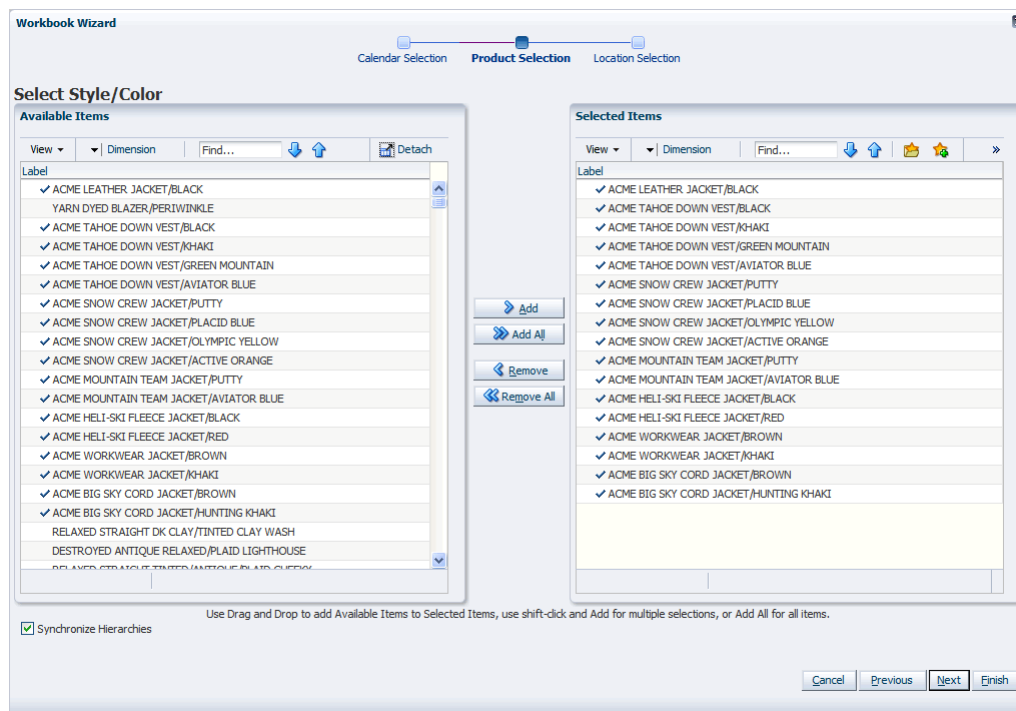
- The workbook wizard opens at the Calendar Selection step. Select the weeks you want to validate and click **Next**.

**Figure 9–2 Data Load Validation Workbook Wizard - Calendar Selection**



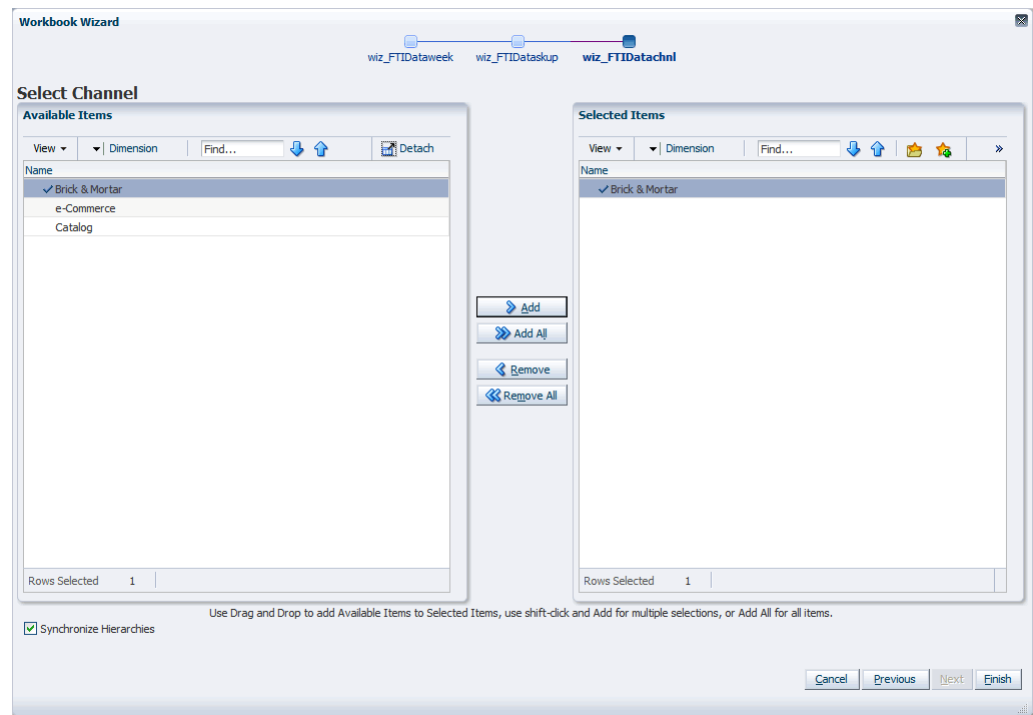
- The Product Selection step appears. Select the style/colors and click **Next**.

**Figure 9–3 Data Load Validation Workbook Wizard - Product Selection**



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

**Figure 9–4 Data Load Validation Workbook Wizard - Location Selection**



The Data Validation workbook is built.

## Assortment Planning Measures View

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

**Figure 9–5 Assortment Planning Measures 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 9–1 Assortment Planning View 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.  |

**Table 9–1 (Cont.) Assortment Planning View Measures**

| <b>Measure</b>                | <b>Description</b>                                                                                                                                              |
|-------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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 %.                                                                                                          |
| 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 %.                                                                                                      |
| 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 %.                                                                                                    |
| 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.                                                                                                                 |

**Table 9–1 (Cont.) Assortment Planning View Measures**

| <b>Measure</b>                     | <b>Description</b>                                                                                                                  |
|------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------|
| 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.                                                                                                        |
| 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 View

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

**Figure 9–6 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 9–2 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.                            |

**Table 9–2 (Cont.) Default Measures View Measures**

| <b>Measure</b>       | <b>Description</b>                                                           |
|----------------------|------------------------------------------------------------------------------|
| 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.            |
| 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 View

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

**Figure 9–7 Item Planning Measures View**

|                   | 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 9–3 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.        |

**Table 9–3 (Cont.) Item Planning Measures View Measures**

| <b>Measure</b>    | <b>Description</b>                                        |
|-------------------|-----------------------------------------------------------|
| 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.     |
| 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 View

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

**Figure 9–8 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 9–4 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 9–4 (Cont.) MFP Measures View Measures**

| <b>Measure</b>         | <b>Description</b>                                                            |
|------------------------|-------------------------------------------------------------------------------|
| 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 9–4 (Cont.) MFP Measures View Measures**

| <b>Measure</b>         | <b>Description</b>                                  |
|------------------------|-----------------------------------------------------|
| 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.                |