Oracle® Retail Merchandise Financial Planning Cost Cloud Service User Guide Release 16.0 E73316-01

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Oracle Retail Merchandise Financial Planning Cost Cloud Service User Guide, Release 16.0

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Preface

This guide describes the Oracle Retail Merchandise Financial Planning Cost Cloud Service 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 Merchandise Financial Planning Cost Cloud Service. This includes merchandisers, buyers, business analysts, and administrative personnel.

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- Oracle Retail Merchandise Financial Planning Cloud Service Administration Guide
- Oracle Retail Merchandise Financial Planning Cloud Service Implementation Guide
- Oracle Retail Merchandise Financial Planning Cloud Service Release Notes
- Oracle Retail Merchandise Financial Planning Retail Cloud Service User Guide
- Oracle Retail Predictive Application Server documentation

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

- Oracle Retail Item Planning documentation
- Oracle Retail Item Planning Configured for COE documentation
- Oracle Retail Assortment Planning documentation
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Conventions

ConventionMeaningboldfaceBoldface type indicates graphical user interface elements associated
with an action, or terms defined in text or the glossary.italicItalic type indicates book titles, emphasis, or placeholder variables for
which you supply particular values.

The following text conventions are used in this document:

Convention	Meaning
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

Introduction

Oracle Retail Merchandise Financial Planning Cloud Service (MFP Cloud Service) provides flexible and easy-to-use financial planning solution templates that enable retailers to create high-level strategic and low-level detailed financial plans. The solution guides users through best-practice planning processes in an efficient, streamlined manner while providing top-down, middle-out, and bottom-up functionality for developing, reconciling, and approving plans.

Note: There are two versions of MFP Cloud Service: MFP Retail Cloud Service and MFP Cost Cloud Service. This guide describes MFP Cost Cloud Service.

For information about MFP Retail Cloud Service, see the Oracle Retail Merchandise Financial Planning Retail Cloud Service User Guide.

MFP Cloud Service provides both pre-season and in-season planning with key financial indicators that include sales, receipts, inventory, gross profit, and open-to-buy. MFP Cloud Service users can bring many plans together for quick and easy reconciliation and approval through consistent, disciplined processes. Furthermore, MFP Cloud Service can be used to plan for multiple retail channels including Brick & Mortar, Direct, and Wholesale/Franchise. Additionally, it includes support for location planning and reconciliation with Merch plans.

MFP Cloud Service enables users to perform the following tasks:

- Create a financial plan in a structured way
- Set and pass targets
- Reconcile a plan
- Submit and approve a plan
- Monitor a plan
- Maintain a plan
- Re-plan

Merch Planning Process

The Merch planning process can be separated into two sub-processes: pre-season and in-season planning. Creating the merchandise financial plan occurs during pre-season planning. Managing and updating the merchandise financial plan occurs during in-season planning. Pre-season planning focuses on creating the Original Plan (Op) against which to benchmark in-season progress. In the pre-season process, the plan is

initialized by seeding from Last Year (Ly) or from a forecast. This seeding gives users a curve of demand against which to spread their new plan. Users then plan sales, receipts inventory, turn, and gross profit measures.

There are two types of users in MFP Cloud Service:

- Merch Targets: These users are usually planning directors or managers. This is a combination of traditional top down and Merch Targets roles. They create the overall targets for the Merch Plan.
- Merch Plan: These users are usually merchandise planners. They create Op and Cp plans for approval by the Merch Targets role.

The targets are published by superior levels to the subsequent levels: Merch Targets passes to Merch Plan. The Merch Plan then submits the Op, Cp, or both to the Merch Targets roles for approval. The Op and Cp plans are not created until they are approved by the Merch Targets role.

This process is shown in Figure 1–1 and Figure 1–2.

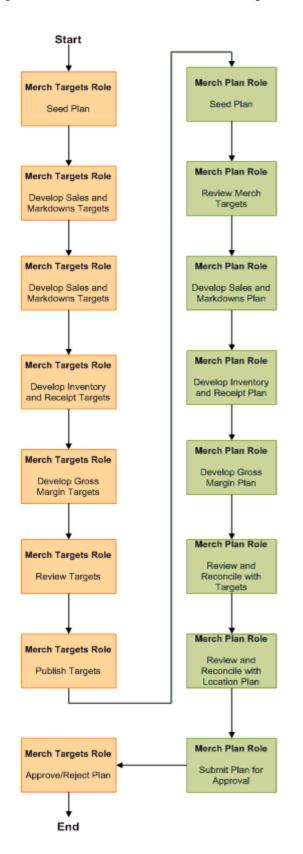
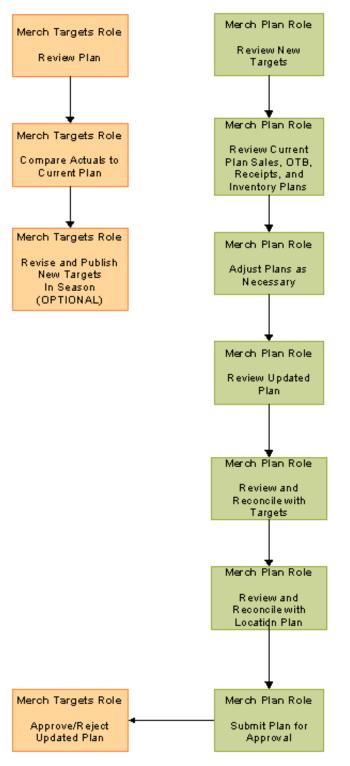


Figure 1–1 Create Merchandise Financial Targets and Plan Process

After the planning period has begun, the process of in-season planning begins. The objective of in-season planning is to identify opportunity and risk for the Op.





Location Planning Process

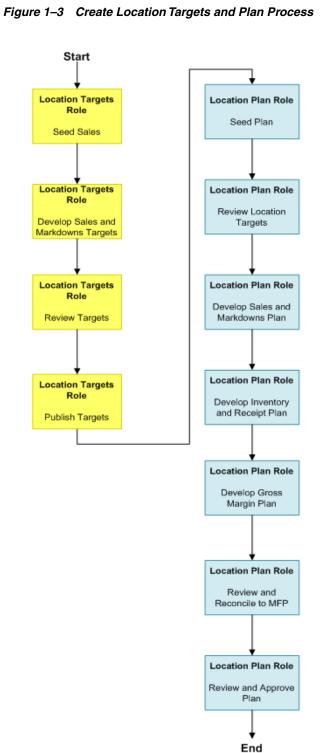
The Location Planning (LP) process is also separated into two sub-processes: pre-season and in-season planning. Creating the location plan occurs during pre-season planning. Managing and updating the location plan occurs during in-season planning. Pre-season planning focuses on creating the Original Plan (Op) against which to benchmark in-season progress. In the pre-season process, the plan is initialized by seeding from Last Year (Ly) or from a forecast. This seeding gives users a curve of demand against which to spread their new plan. Users then plan sales, receipts inventory, turn, and gross profit measures.

There are two types of users in LP:

- Location Targets: These users may be location planning managers or location planners, meaning that the location targets and plan may be created by the same user. They create a version of LY Sales/Markdowns that is corrected for non-repeating events such as store closures due to bad weather, construction, and so on. These are passed down as targets to the location planner.
- Location Plan: These users are usually location planners. They create Op and Cp plans. They plan total sales, markdowns, and so on through the use of average store metrics, using a number of user defined hierarchies with location attributes (such as comp, volume, size, climate, and demographics).

The targets are published by superior levels to the subsequent levels: top location targets pass targets as the location plan. The location plan self-approves the Op, Cp, or both. The Op and Cp plans are not created until they are approved.

This process is shown in Figure 1–3 and Figure 1–4.



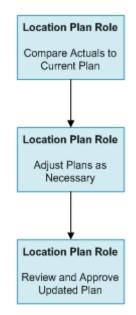


Figure 1–4 Manage/Update Location Plan Process

Target and Plan Alignment

Merch Targets and Merch Plans align with one another. Location Targets and Location Plans align with one another through seeding the plan with the target. Merch and Location Plans align with one another.

Role Planning Overview

The Merch Planning process involves multiple user roles. These user roles work together to pass targets and reconcile plans at different levels of the product, location, and calendar hierarchies. The process of using multiple roles divides the planning process into logical sections that provide oversight into the plan creation at multiple levels.

The target user passes targets to the Merch Targets user, both for Merchandise Financial Planning and Location Planning. The approved plans can be made visible to an item planner using a separate product, Oracle Retail Item Planning.

Planning Roles

Planning roles serve the following purposes:

- They identify the organizational level at which planning occurs.
- They set the product level at which that role will plan.
- They set the time period at which that role will plan.

Each role is part of a bottom-up or a top-down process (see Table 1–1). The role's base intersection defines the lowest level of product to which that role has access when building a plan. The planning role defines the range of planning responsibilities and also controls the measures shown in planning views and those measures' accessibility.

While the planning roles can be customized during implementation, a standard set of planning roles is supplied with MFP Cloud Service:

Merch Targets

- Merch Plan
- Location Targets
- Location Plan

The range of planning and the role relationships for these roles are listed in Table 1–1.

Table 1–1 Range of Planning and Role Relationships

Role	Base Intersection	Range of Planning	Lowest- Level Time Period
Merch Targets	Department/Week/Channel	Company - Department	Week
Merch Plan	Subclass/Week/Channel	Department - Subclass	Week
Location Targets	Company/Week/Location	Channel - Location	Week
Location Plan	Department/Week/Location	Channel - Location	Week

Merchandise Financial Planning Components and Key Processes

The key components and features of MFP Cloud Service provide the basis for standard processes and activities that are necessary for planners to perform their planning functions.

Key components include:

Workbooks

The primary element used in building a plan. A planner uses a workbook to build and maintain plans throughout the season.

Views

Contained within workbooks. The views contain predefined lists of measures and are arranged to reflect a step in the standard planning process, allowing a user to work in a logical path to build a plan.

View Data

Used to save, commit, and edit plan data.

Planning Roles

Each MFP Cloud Service user is assigned to a specific role. These roles control the application functions that are available and the level of aggregation in the product dimension for that user. They play an integral part in how plans are created.

Plan Versions

MFP Cloud Service functionally provides the capability to have more than one version of the plan. This allows users to track actual data against the original plan, re-plan the current season, and save to a new plan.

Plan Reconciliation and Approvals

Plan reconciliation is a process of combining lower-level plans and comparing them to a higher-level target. Plan approval is a built-in application process that allows a Merch Plan role to submit a plan for approval to a Merch Targets role, who can approve or reject it.

Workbooks

A MFP Cloud Service user accomplishes multiple planning tasks using workbooks. A workbook is a user-defined data subset of a master database that includes selected hierarchical dimensions. These workbooks consist of views and graphical charts used for planning, viewing, and analyzing business measures. Workbooks organize related planning information and divide levels of user responsibility. This framework allows a user to easily view, create, modify, and store datasets that are common to repeated tasks.

A workbook structure consists of the following elements:

- Product levels and members such as Department, Class, and Sub-Class for the Men's Sweater Department.
- Calendar levels and members such as Season, Month, and Week for the Spring 2020 Season.
- Location levels and members may reflect multiple channels within an organization at their aggregate level, such as total Brick & Mortar divisions, Catalog, or e-Commerce.
- Plan versions such as Working Plan (Wp), Original Plan (Op), Current Plan (Cp), and Last Year (Ly).
- Measures and corresponding business rules such as Sales, Receipts, and Inventory.

Workbooks can be built automatically through a batch process or manually using the Planning Workbook wizard. Each workbook contains the planning views, measures, and business rules needed for a complete plan.

Data in a workbook can be displayed using both multidimensional spreadsheets and charts. The data can be viewed at a detailed level or at an aggregate level.

Views

Planning views are multidimensional pivot tables that provide users with views of the data contained in a workbook. Oracle Retail Predictive Planning comes with a series of built-in views that support an industry-standard business process. Each view can contain its own unique product, calendar, location, and metric information. This approach enables users across an organization to use a standard planning process.

Views can be customized for each user. Rotating, pivoting, and formatting functions allow a user to create individual views within a view. Each user may also display the data in a graphical format by using the charting functionality.

Editing View Data

Users edit and enter data in the views. The solution's business rules are implemented throughout the views to ensure consistent edit behavior regardless of where (on which view) the edit it performed.

Measure Aggregation and Spreading

Users may edit data at many levels of each dimension (product, location, calendar). If the data is modified at an aggregate level (a level with one or more lower levels beneath it), the modifications are distributed to the lower levels within the dimension. This function is called *spreading*. If data is modified at a level that has a higher level above it (parent), the data changes are reflected in those higher levels. This is known as *aggregation*. Each measure that is used in the MFP Cloud Service solution is assigned a default aggregation and spreading behavior. A measure's aggregation method controls how data is calculated at aggregate levels of the dimension, such as month or department. A measure's spread method controls how data is spread to lower levels of a dimension when the user enters data at an aggregate level. Table 1–2 contains a list of relevant aggregation and spread methods that are used in MFP Cost Cloud Service.

Aggregation Methods

Table 1–2 displays aggregation methods, their results, and their types of measures.

Aggregation (Agg) Methods	Result	Types of Measures
Total	Values are summed up the dimension levels.	Value or unit measures such as sales and receipts.
Recalc	Value is recalculated at aggregate levels based on its rule calculation.	Percentage measures such as Gross Profit%. Also other calculated measures such as TO and Forward Cover.
PST - Period Start Total	Value is summed up non-calendar hierarchies. Value at aggregate time equals the same value as the first child period's value belonging to the aggregate parent.	Beginning of Period Inventory (BOP).
PET - Period End Total	Value is summed up non-calendar hierarchies. Value at aggregate time equals the same value as the last child period's value belonging to the aggregate parent.	End of Period Inventory (EOP).
AMBG	All values within and across hierarchies are equal; otherwise a ? is displayed at aggregate levels.	Used by informational text measures, such as Event Information or Approve/Eject pick lists.
B_AND	For Boolean types only referring to situations that are either true or false . Value is on or true at an aggregate level if all values within a dimension level are on.	Boolean (check box) Submit .

Table 1–2 Aggregation Methods

Spread Methods

Table 1–3 displays spread methods, their results, and their types of measures.

Spread Methods	Result	Types of Measures
Proportional	Typically used in conjunction with Total Agg Type. Value is spread proportionally to the child dimensions when a value is entered at an aggregate level.	Value or unit measures such as sales and receipts.

Spread Methods	Result	Types of Measures
None	The result of the edit is passed to another measure. The spread method for the measure that inherits the edit is used to spread the new value to the child dimensions. For example, an edit to Wp Sales var Ly R% at an aggregate level (Month) results first in the Sales R value being recalculated at the Month level, reflecting the edited percent increase over Ly Sales R. Then the new Sales R value is spread to the week level proportionally. Finally, the Wp Sales var to LY R% is recalculated at the week level.	Variance measures such as Wp Sales var to Ly R%, Wp Mkd var to Op R%.
PS (Period Start)	For edits at an aggregate level, the edited value is placed into the first logical child dimension beneath the level of the edit. For example, an edit to BOP Inv at the Month level spreads the edited BOP Inv value to the first week reporting to the Month.	NA
PE (Period End)	For edits at an aggregate level, the edited value is placed into the last logical child dimension beneath the level of the edit. For example, an edit to EOP Inv at the Month level spreads the edited EOP Inv value to the last week reporting to the Month.	Typically used in conjunction with EOP Inv, Avg Inv.

Table 1–3 (Cont.) Spread Methods

Overriding Default Spread Methods

A measure's default spread method can be overridden on a data entry by using the override spread method function. The default spread method is overridden for that specific data edit and is not permanently changed. To use an alternate spread method, enter a number in a data cell at an aggregate level followed by an **r**, **e**, **p**, or **d**. This applies the replicate, even, proportional, or delta distribution function to spread that number to the lowest level.

Note: Save information in the workbook before trying these features. If the results are not satisfactory, use the **Edit - Revert** command to undo the changes. The Revert command resets the workbook back to its state after the last save was issued.

Explanation of Spread Types

This section describes the following spread types.

- Replicate
- Even
- Proportional
- Delta

For each of the spread types, assume the following dimensions and values:

Table 1–4Example for Spread Types

	February	Week1	Week2	Week3	Week4
Department1	570	155	170	100	145

	February	Week1	Week2	Week3	Week4
Class1	120	20	20	40	40
Class2	100	25	25	25	25
Class3	200	100	50	20	30
Class4	150	10	75	15	50

Table 1–4 (Cont.) Example for Spread Types

Replicate

Replicate copies the entered value to all cells below the aggregate dimension. This method can be used for measures that have an aggregation method of Total or Recalc.

If a value is entered at more than one aggregate dimension (such as aggregate product and time), then the value is copied to all lower-level base cells below the aggregate time and product.

Example: Enter **50r** for Feb/Department1. The values at every intersection of week and class belonging to Feb/Department1 are changed to 50. The aggregate total is then recalculated as the sum of the lower-level cells, 800. See Table 1–5 for the results.

Table 1–5 Example for Replicate Method

	February	Week1	Week2	Week3	Week4
Department1	800	200	200	200	200
Class1	200	50	50	50	50
Class2	200	50	50	50	50
Class3	200	50	50	50	50
Class4	200	50	50	50	50

Even

Even divides the entered value evenly to all cells below the aggregate dimension. This method can be used for measures that have an aggregation method of Total or Recalc.

If a value is entered at more than one aggregate dimension (such as aggregate product and time), then the value is copied to all lower-level base cells below the aggregate time and product.

Example: Enter **600e** for Feb/Department1. The value at every intersection of week and class belonging to Feb/Department1 changes to 37.5. The aggregate total is then recalculated as the sum of the lower-level cells, 600. See Table 1–6 for the results.

Table 1–6 Example for Even Method

	February	Week1	Week2	Week3	Week4	
Department1	600	150	150	150	150	
Class1	150	37.5	37.5	37.5	37.5	
Class2	150	37.5	37.5	37.5	37.5	
Class3	150	37.5	37.5	37.5	37.5	
Class4	150	37.5	37.5	37.5	37.5	

Proportional

Proportional spreads the difference between the original and entered value to all cells below the aggregate dimension based on that cell's percent contribution to the original value in the edited cell. This method can be used for value or unit measures that have an aggregation method of Total.

If a value is entered at more than one aggregate dimension (such as aggregate product and time), then the value is copied to all lower-level base cells below the aggregate time and product.

Example: Enter **1140p** for Feb/Department1. The value for every intersection of week and class belonging to Feb/Department1 doubles. The percentage contribution of the base cell to the aggregate remains unchanged. See Table 1–7 for the results.

	February	Week1	Week2	Week3	Week4
Department1	1140	310	340	200	290
Class1	240	40	40	80	80
Class2	200	50	50	50	50
Class3	400	200	100	40	60
Class4	300	20	150	30	100

Table 1–7 Example for Proportional Method

Delta

Delta spreads the difference between the original and entered value evenly to all cells below the aggregate dimension. This method can be used for value or unit measures that have an aggregation method of Total.

If a value is entered at more than one aggregate dimension (such as aggregate product and time), then the value is copied to all lower-level base cells below the aggregate time and product.

Example: Enter **670d** for Feb/Department1. The value for every intersection of week and class belonging to Feb/Department1 increases by the same value, 100/16 or 6.25. See Table 1–8 for the results.

	February	Week1	Week2	Week3	Week4
Department1	670	155	170	100	145
Class1	120	26.25	26.25	46.25	46.25
Class2	100	31.25	31.25	31.25	31.25
Class3	200	106.25	56.25	26.25	36.25
Class4	150	16.25	81.25	21.25	56.25

Table 1–8 Example for Delta Method

Saving Workbook Data

Two options, Save and Commit, are available to ensure that data is saved during the planning process.

 Save. Data is saved to a user database and does not affect the master database. This allows you to manipulate details and evaluate the impact of the changes without changing the master data. Any data saved with the Save option is saved to a local copy of the database. Other users are not able to view the saved data by default. You may save the workbook with global or group access, enabling others to view your local workbook.

• Commit. Date is saved to the master database. Data (including changed) is accessible to all users after their workbooks are rebuilt or refreshed.

Refresh and build are two methods for retrieving updated data from the master database to a local workbook.

- Refresh. A user can run any refresh group that has been configured to retrieve data from the master database to an existing workbook.
- Build. A user may build a new workbook manually. As an alternative for building
 a workbook manually, a Merchandise Financial Planning administrator can run a
 batch process (delivered with Merchandise Financial Planning) to automatically
 build a new workbook by using the Auto Workbook Build process. Refer to the
 Oracle Retail Predictive Application Server Administration Guide for the Fusion Client
 for more details.

Plan Versions

The strategic and financial planning processes supported by MFP Cloud Service use plan versions to designate different plan types that are used throughout the planning horizon. These version names and their abbreviations are used frequently in planning views (for example, to distinguish measures).

The plan versions that are visible to MFP Cloud Service users depend on the users' planning roles.

Plan Version	Merch Plan	Merch Targets	Location Plan	Location Targets
Working Plan (Wp)	Х	Х	Х	Х
Last Year (Ly)	Х	Х	Х	Х
Original Plan (Op)	Х	Х	Х	Х
Target (Tgt)	Х	Х	Х	Х
Current Plan (Cp)	Х	Х	Х	Х
Waiting for Approval (Wa)	Х	Х	NA	NA

Table 1–9 Plan Versions Visible to MFP Cloud Service

The following sections describe each plan version in more detail.

Working Plan (Wp)

- The plan version that is editable for a particular preseason or in-season period.
- This plan version is used to develop and revise plan data.
- Actual data values are loaded into the Wp (and Cp) version for all elapsed time periods.

Last Year (Ly)

• A plan version that provides a reference to last year's actual historical data.

Target (Tgt)

- Target measures contain values set by a higher role that are then passed to a lower role. For example, the Merch Targets role passes a target plan version down to the Merch Plan role.
- Targets are created by the role through the **Publish Targets** custom menu button, which is initiated by the user. After the data is committed to the database, those targets become available to the Merch Plan role.

Waiting for Approval (Wa)

- A plan awaiting approval by the Merch Targets role. The Merch Plan role submits the plan for approval, which copies the plan data from the Wp version to the Wa version.
- The Merch Targets and Merch Plan roles access the same Wa version. The Merch Plan role owns this version, and the Merch Targets role reads from this version to populate measures. The Wa version is read-only for both roles.
- If the plan is approved, a Waiting for Approval plan is promoted to either the Original Plan (Op) version, the Current Plan (Cp), or both the Op and Cp, depending upon the Enable Op Approval boolean set in Admin Workbook when submitting the plan for approval.
- If the plan is rejected, the Working Plan (Wp) version is not promoted to Original Plan or Current Plan. Necessary adjustments are made before the plan is resubmitted for approval.

Original Plan (Op)

- A pre-season plan that has been approved and promoted from Waiting for Approval (Wa) to Original Plan (Op) version.
- The Merch Plan role's plan is the only plan that is approved and becomes the Original Plan.
- All roles can view the Op version measures.

Current Plan (Cp)

- An in-season plan that has been approved and promoted from Waiting for Approval (Wa) to Current Plan (Cp) version.
- All roles can view the Cp version measures.
- The Merch Plan role's plan is the only plan that is approved and becomes the Original Plan.
- Actual data values are loaded into the Cp (and Wp) version for all elapsed time periods.

Plan Reconciliation

The goal of plan reconciliation, an important step of the financial planning process, is to achieve a single, unified plan that all contributing parties have reviewed and approved. As plans are generated, they move through a reconciliation phase, and on to the plan approval phase.

MFP Custom Menu Options

MFP Cloud Service custom menu buttons in the RPAS Fusion Client are located above the top right corner of the content area for some workbooks. The custom menus are specific to the steps in the different tasks. If you are on a specific step, you can see the custom menus that have been configured for that step.

Figure 1–5 Custom Menu Button in the RPAS Fusion Client

Ho <u>m</u> e	<u>A</u> bout	<u>H</u> elp	Change pa <u>s</u> sword	Logout adm	0	
			Workbook : develop&Publish-Co. Tgts			
					Seed	

The custom menu buttons vary, depending on the current step. The following custom menu buttons are available:

- Merch Targets Role
 - Seed
 - Publish Targets
- Merch Plan Role
 - Seed
 - Submit Plan
 - Copy Approved Plan
- Location Targets Role
 - Seed
 - Publish Targets
- Location Plan Role
 - Seed
 - Approve Plan

Note: Descriptions of these custom menu buttons are provided where relevant throughout this guide.

Seeding the Plan

Seeding is a process that populates certain Working Plan data elements with data from last year's data from external systems. Seeding facilitates the ability to create a plan by providing seasonal curves across time and relationships between products and locations. After edits are made to a Working Plan measure that has been seeded, the new edit spreads to lower hierarchical members based on the data that has already been seeded, maintaining the seasonal curves and relationships between products and locations.

Plan Approval

In MFP Cloud Service, the Merch Targets and Merch Plan roles participate in the plan approval process.

The Merch Plan role uses the Approval view to submit plans to the Merch Targets role for approval. The Merch Plan role also uses this view to view the status of their submitted plans. The Merch Targets role uses the approval view to approve or reject the submitted plans. Submit for approval functionality is available as a custom menu button. The Submit button allows a user to submit the plan and move the data to the Wa version.

Publishing Targets

In MFP Cloud Service, the Merch Targets roles may set target values for key measures. They then makes these targets available to the role below them in the planning process, Merch Plan.

Merch Targets roles create their plan and use the Publish Targets view to update their target measures with the data in their plan. The data is published to Merch Plan roles when they click the **Publish Targets** custom menu button. Then Merch Plan roles have access to these target values in their workbooks after a refresh or build.

MFP Setup Task

The MFP Maintenance activity consists of the following tasks:

- MFP Setup
- Location Setup
- Enable Op Approval
- Load Validate

This chapter focuses on the steps within the MFP Setup Task, which include:

- History Mapping
- Local Currency
- VAT Setup
- Manage Export

Opening the MFP Setup Workbook

To open a MFP Setup workbook:

1. Click the **New Workbook** icon in the MFP Setup task.

Figure 2–1 MFP Setup Task

MFP Maintenance					
Task or Step	Action				
🔺 📋 MFP Setup	🗳 🖪 🖉				
History Mapping	🔮 🖪 💋				
Local Currency	🔮 🖪 🖉				
VAT Setup	🔮 🖪 💋				
Manage Export	🔮 🖪 💋				
Location Setup	🔮 🖪 🖻				
Enable OP Approval	🔮 🖪 🖻				
Load Validate	P 🖻				

The workbook is built.

History Mapping

The History Mapping step is used by the administrator to map weeks for the last year and the last last year (two years ago). Using History Mapping, the administrator can map up to two years back.

Figure 2–2 History Mapping

🖺 MFP Maintenance				
Task or Step	Action			
⊿ 📋 MFP Setup	P 🖻			
History Mapping	P 🖻			
Local Currency	P 🖻			
VAT Setup	P 🖻			
Manage Export	P 🖻			
Location Setup	🔮 🛛 💋			
Enable OP Approval	P 🛛 🖻			
Load Validate	P 🛛 🖻			

History Mapping contains only the History Mapping view.

History Mapping View

Within this view, you can set the mapping for up to two years back. The previous year's mapping is used to identify which week to map to when determining the last year's values in a workbook. The mappings from the last last year are used to identify which weeks to map to when determining the values from two years back in a workbook.

The left-most column is the Week Label. The right-most column is the associated Week ID.

			Measure Calenda	ar
	Find	- 🕹 🧃		*
	Lag Ly	Lag Lly	Week Id	
2/4/2017	w01_2018	w01_2019	w01_2017	1
2/11/2017	w02_2018	w02_2019	w02_2017	-
2/18/2017	w03_2018	w03_2019	w03_2017	
2/25/2017	w04_2018	w04_2019	w04_2017	
3/4/2017	w05_2018	w05_2019	w05_2017	
3/11/2017	w06_2018	w06_2019	w06_2017	
3/18/2017	w07_2018	w07_2019	w07_2017	
3/25/2017	w08_2018	w08_2019	w08_2017	
4/1/2017	w09_2018	w09_2019	w09_2017	
4/8/2017	w10_2018	w10_2019	w10_2017	

Figure 2–3 History Mapping

History Mapping

Table 2–1Mapping View Measures

Measure	Description
Lag Ly	Identifies the week that is being used for mapping as adjusted last year.
Lag Lly	Identifies the week that is being used for mapping as last last year (two years ago).
Week ID	Identifies the internal week position for the current week for reference. This is useful for copying the week positions when manually setting Lag Ly and Lag Lly.

Local Currency

The Local Currency step provides support for administering local currency configuration. This view is only available when the provision option with local currency is implemented.

🚇 MFP Maintenance	
📰 MFP Maintenance	
Task or Step	Action
⊿ III MFP Setup	C 🖸
History Mapping	C 🖸
Local Currency	C 🕒
VAT Setup	🕒 🕒 😰
Manage Export	🕒 🕒 😰
Location Setup	🔮 🖪 💋
Enable OP Approval	🗳 🖪 💋
Load Validate	🔮 🖪 💋

Figure 2–4 Local Currency

The Local Currency step consists of two views:

- Local Currency Rate
- Local Currency Symbol

Local Currency Rate

Within this view, you can set the local currency conversion rate for each Channel by Week.

Figure 2–5	Local	Currency	Rate	View

✓ Local Currency Rate					✓ < [⊥]
Measure K S S					Calendar Location
💷 🔟 📐 Find		• 🔒 📑		📩 XYZ	9 49 Vi
	W1 of 3LY	W2 of 3LY	W3 of 3LY	W4 of 3LY	W5 of 3LY
Brick & Mortar	1.00	1.00	1.00	1.00	1.00
CA Brick & Mortar	0.77	0.77	0.77	0.77	0.77
CA Direct	0.77	0.77	0.77	0.77	0.77
Direct	1.00	1.00	1.00	1.00	1.00
UK Brick & Mortar	1.56	1.56	1.56	1.56	1.56
UK Direct	1.56	1.56	1.56	1.56	1.56
UK Wholesale/Franchise	1.56	1.56	1.56	1.56	1.56
Wholesale/Franchise	1.00	1.00	1.00	1.00	1.00
Local Currency Rate 🖁 Local Cur	rency Symbol				+

	icy hale view measures
Measure	Description
Local Currency Rate	The rate used to convert values to the local currency for a given Channel/Week.

Table 2–2 Local Currency Rate View Measures

Local Currency Symbol View

Within this view, the planning administrator sets the local currency symbol for each channel. This currency symbol can be included as the Location attribute in all Local Currency views.

For example, in Figure 2–6 the BRA Brick & Mortar channel has R\$ as its local currency symbol, which indicates that local currency values for this channel are in Brazilian Real. All local currency BRA Brick & Mortar monetary values are displayed with R\$.

Local Currency Symbol ¥ Measure Location 1 Find... Local Currency Symbol BRA Brick & Mortar R\$ BRA Direct R\$ BRA Wholesale/Franchise R\$ Brick & Mortar s CA Brick & Mortar s CA Direct \$ CN Brick & Mortar ¥ CN Direct ¥ Local Currency Rate Local Currency Symbol

Figure 2–6 Local Currency Symbol View

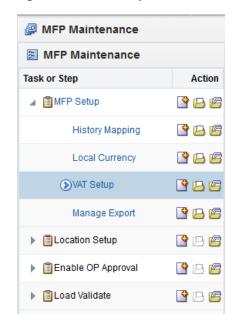
Table 2–3Local Currency Symbol View Measures

Measure	Description
Local Currency Symbol	The graphic symbol associated with the channel's local currency.

VAT Setup

The VAT Setup step allows a planning administrator to enter the Value Added Tax (VAT) rate for each subclass by week.

Figure 2–7 VAT Setup



The VAT Setup step contains the VAT Setup view.

VAT Setup View

In this view, the planning administrator can input the VAT% rate for each subclass by week.

When sales costs are planned, the VAT% rate is applied to gross sales and then returns are subtracted to calculate net sales. If no VAT% rate is planned, then net sales are simply determined as gross sales less returns.

VAT Rate% is stored at Week/Subclass/Channel.

VAT Setup					▼ ⊻	
Measure Location		ł		ŀ	Calenda	r
	Find 💌	₽ û	B) 🛛	🧧 🐝 🛛	2 🔒 🖓	4
	W1 of 3LY	W2 of 3LY	W3 of 3LY	W4 of 3LY	W5 of 3LY	١
30000 Loafers	5.0 %	5.0 %	5.0 %	5.0 %	5.0 %	
30001 Boots	5.0 %	5.0 %	5.0 %	5.0 %	5.0 %	
30002 Cap Toe	5.0 %	5.0 %	5.0 %	5.0 %	5.0 %	
30003 Loafers	5.0 %	5.0 %	5.0 %	5.0 %	5.0 %	
30004 Lace Ups	5.0 %	5.0 %	5.0 %	5.0 %	5.0 %	
30005 Sport	5.0 %	5.0 %	5.0 %	5.0 %	5.0 %	
30006 Low Heel	5.0 %	5.0 %	5.0 %	5.0 %	5.0 %	
30007 High Heel	5.0 %	5.0 %	5.0 %	5.0 %	5.0 %	
30008 Apkle	4	5 0 M		5 A A/		,

Figure 2–8 VAT Administration - VAT Setup Workbook

 Table 2–4
 VAT Administration - VAT Setup Workbook Measures

Measures	Description
VAT%	The default value-added tax (VAT) rate percentage for the Subclass/Channel.

Manage Export

The Manage Export step provides the ability to control which periods and positions are included when plans are exported. The values set in this step are employed in batch (along with corresponding Approved/Submitted/Seeded Info measures) to set export flags for all the plan versions that are exportable from MFP Cost Cloud Service:

- Merch Plan Current Plan (MP Cp)
- Merch Plan Original Plan (MP Op)
- Merch Plan Waiting for Approval Plan (MP Wa)
- Merch Plan Working Plan (MP Wp)
- Location Plan Current Plan (LP Cp)
- Location Plan Original Plan (LP Op)
- Location Plan Working Plan (LP Wp)
- Merch Targets Target (MT Tgt)
- Merch Targets Working Plan (MT Wp)
- Location Targets Target (LT Tgt)
- Location Targets Working Plan (LT Wp)

MFP Maintenance	
📰 MFP Maintenance	
Task or Step	Action
MFP Setup	🗳 🕒 🖻
History Mapping	🗳 🕒 🖻
Local Currency	🔮 🕒 🖻
VAT Setup	🗳 🕒 🖻
Manage Export	🕒 🕒 🖆
Location Setup	🗳 🕑 🖻
Enable OP Approval	🕒 🖻 😰
Load Validate	🗳 🕑 🖻

Figure 2–9 Manage Export

The planner or administrator indicates whether elapsed periods should be included and which positions should be exported in the following two views:

- Export Elapsed Setting
- Manage Export

Export Elapsed Setting View

Within this view, the planner or administrator designates whether or not elapsed periods should be included when exporting plan data.

Figure 2–10	Export Elapse	d Setting View
-------------	---------------	----------------

Export Elapsed Se	etting 👻 🖌
	Measure
	Find »
Export Elapsed Periods	
Export Elapsed Setting	Manage Export

Table 2–5 lists the measures available in this view.

Measure	Description		
Export Elapsed Periods	When selected, this flag indicates that data for elapsed periods should be exported. By default, this value is unchecked, meaning that only data for un-elapsed periods is included in exported plan data.		

 Table 2–5
 Export Elapsed Setting View Measures

Manage Export View

Within this view, the planning administrator selects the positions that should be included when exporting plan data for all versions.

✓ Manage Export				▼ ¥
Measure Location		×	•	Calendar Product
	Find	- 🕹 😚	B P D 3	🖪 💑
	H1 3LY	H2 3LY	H1 LLY	H2 LLY
100 Men's Footwear	✓	\checkmark	\checkmark	
200 Women's Footwear		\checkmark	\checkmark	\checkmark
300 Men's Casuals		\checkmark	\checkmark	\checkmark
400 Mens Tops		\checkmark	\checkmark	\checkmark
500 Women's Casuals Traditional	\checkmark	\checkmark	\checkmark	\checkmark
505 Women's Casuals Fast Fashion	\checkmark	\checkmark	\checkmark	\checkmark
600 Women's Classics	\checkmark	\checkmark	\checkmark	\checkmark
	•			
Export Elapsed Setting	Manage Expo	rt		

Figure 2–11 Manage Export View

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

 Table 2–6
 Manage Export View Measures

Measure	Description
Export Mask	Allows the user to control which positions are exported for all plan versions. When selected, the Department/Channel/Half is included when exporting plan data. By default, this boolean is checked for all positions. If the user wants to exclude any Department/Channel/Half from exporting, the user must un-check this boolean.

The export flags are set based on Export Mask and the Approved or Submitted Info for Approved or Submitted Plans and Seeded Info for Working Plans.

Location Setup Task

The MFP Maintenance activity consists of the following tasks:

- MFP Setup
- Location Setup
- Enable Op Approval
- Load Validate

This chapter focuses on the steps within the Location Setup Task, which include:

- Location Info
- Like PoC

Opening the Location Setup Workbook

To open a Location Setup workbook:

Click the **New Workbook** icon in the Location Setup task.

Figure 3–1	Location	Setup	Task
------------	----------	-------	------

MFP Maintenance	
Task or Step	Action
MFP Setup	🔮 🕒 🖻
∡ ☐ Location Setup	🔮 🕒 🖻
Location Info	🔮 🕒 🖻
Like PoC	🔮 🕒 🖻
Enable OP Approval	🔮 🖂 🖻
▶ 📋 Load Validate	🔮 🖂 🖻

The workbook is built.

Location Info

The Location Info step includes two views, Location Space and Location Info.

Location Info View

With this view, the user can set up additional information related to the location, such as description, status of location, and wholesale/franchise location.

	Find	- 4	
	Location Description	Location Status	W/F Location
1000 Charlotte		Active	
1001 Atlanta		Active	
1002 Dallas		Active	
1003 Boston	North Cold Large Store Fulfill DC Mail to Customer Upper Middle	Active	
1004 New York		Active	
1005 Philadelphia		Active	

Figure 3–2 Location Info View

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

Table 3–1 Location info View Measures

Measure	Description
Location Description	Use the attributes employed in associating the two stores (why these locations are alike) to provide a short description of the location, for example, Southern High-Income Hot Dry.
W/F Location	Set the flag to true for all locations that are in a W/F channel.
Location Status	Range: Active, Closed, Refurbish

Location Space View

This is the total physical area that a department occupies within the location, expressed in square meters.

Measure K S Square Meter								
•	1	Find	- 4	û 📴	IS 🛛 🕸	i mi 👸	48 4 8	
Location [Lat	pel]	100 Men's Footwear	200 Women's Footwear	300 Men's Casuals	400 Mens Tops	500 Women's Casuals Traditional	505 Women's Casuals Fast	600 Women's Classics
1000 Charlotte		381.30	381.30	762.60	762.60	1,525.20	1,525.20	762.
1001 Atlanta		54.60	54,60	109.20	109.20	218.40	218.40	109.
1002 Dallas		42.50	42.50	85.00	85.00	170.00	170.00	85.
1003 Boston		131.70	131.70	263.40	263.40	526.80	526.80	263.
1004 New York		84.75	84.75	169.50	169.50	339.00	339.00	169.
1005 Philadelphi	8	242.00	242.00	484.00	484.00	968.00	968.00	484.
1006 Chicago		119.70	119.70	239.40	239.40	478.80	478.80	239
1007 Minneapoli	5	28.35	28.35	56.70	56.70	113.40	113.40	56.

Figure 3–3 Location Space View

Table 3–2 lists the measures available in this view.

Table 3–2 XYZ View Measures

Measure	Description
Square Meter	The total store area in square meters

Like PoC

The Like PoC step includes one view: Like Location.

Like Location View

With this view, the user can set up like location information for new locations to use historical sales for Ly in Location Plan workbooks. The user can also set an end date for the like location, after which the application will stop using the historical sales of the like location and start using the historical sales of the same location in Ly.

	Find	- 4
	Like Location	Like Location End Date
1000 Charlotte		
1001 Atlanta		
1002 Dallas		
1003 Boston	1149 Chey	03/23/202
1004 New York		
1005 Philadelphia		
1006 Chicago		
1007 Minneapolis	1046 Minot	04/11/202

Figure 3–4 Like Location View

Table 3–3 lists the measures available in this view.

Measure	Description
Like Location	Identify the Sister Store for the location. Using the location hierarchy, determine a similar store based on location along with the attributes indicated in alternates (for example, income, climate, and so on).
Like Location End Date	The date after which the like location information is ignored by the system to use historical sales data for Ly. If the date is not set for the newly added locations using DPM, then like location information will be used until the DPM status of the location becomes formal.

Table 3–3 XYZ View Measures

Enable Op Approval Task

The MFP Maintenance activity consists of the following tasks:

- MFP Setup
- Location Setup
- Enable Op Approval
- Load Validate

Planning administrators use this workbook to enable Merch Plan and Location Plan users to submit and approve plans to the Original Plan (Op). As a planning administrator, you can select or deselect this option at any time. If you deselect it during the in-season, Merch Plan and Location Plan users cannot submit or approve a plan for the Op. You can choose to do this after the planning process has been finalized in order to lock down the Op.

Enable OP Approval Workbook

To build a new Enable OP workbook, perform the following steps:

1. Click the New Workbook icon in the Enable OP Approval task.

Figure 4–1 Enable OP Approval Validation

P MFP Maintenance	
🔚 MFP Maintenance	
Task or Step	Action
MFP Setup	
Location Setup	🕒 🖻 🖉
📓 🗐 Enable OP Approval	🕒 🕒 🕼
Merch Plan	🕒 🛛 🖉
Location Plan	🗳 B 🙆
Load Validate	🗳 B 😰

2. The workbook wizard opens at the Product Selection step. Select the departments you want to enable and click **Next**.

					-	-0		-0						
			5	elect F	roduct	Select Calendar	94	elect PoC						
Select Pro	duct						Selected F	Product						
Available	Items						Selected	Items						
View -	Dimension	Find.	4		🛃 Detach		View -	Dimension	Find.	4			-	30
Label							Label							
100	Men's Footwear	i.					₹ 500	Women's Case	uals Tradit	ional				
200	Women's Foots	rear				> Poe	√ 505	Women's Casu	uais Fast F	ashio	n:			
300	Men's Casuals					Add All								
400	Mens Tops					& Bemove								
¥ 500	Women's Casu	als Traditiona	al.											
✓ 505	Women's Casu	als Fast Fast	vion			C Remove All								
600	Women's Class	RCS .												
														39
														~
2 Synchron	Use Drag a size Hierarchies	nd Drop to ad	d Availa	ble Rer	ns to Selected iten	ns, tap on individual i	tem and Add for	multiple selecti	ons, or Ad	d Ail fo	r all fle	ms.		

Figure 4–2 Workbook Wizard: Product Selection

3. The Calendar Selection step appears. Select the halves and click **Next**.

			1		hodud		Select Calendar		diam'r						
				etera P	10gud		Select Calendar								
Select Cal	endar				D2			Selected Calendar							
Available	Items			10	w.			Selected	Items						
view -	Dimension	Find.	4		🛃 Detach			View -	Dimension	Find.	4	-		14	
Label								Label							
H1	шY					*		✓H1	TY						
H2	LLY						> Add	✓ H2	TY						
н	LY					n	Add All								
H2	LY						& Bemove								
√ H1	TY					H.	C Remove All								
✓ H2	TY														
H1	NY														
H2	NY					÷									
															ю
	Lise Drac a	nd Dron to ac	ti Availa	ue Ner	ris to Selected	Barn	is, tap on individual it	m and Add for	mutterie selector	vis. or 64	1.42.5	r all the	ms		
Synchron	ize Hierarchies	in a spin a					ing any arrange arrange ar								

Figure 4–3 Workbook Wizard: Calendar Selection

4. The Location Selection step appears. Select the channels you want and click **Finish**.

			8	lelect F	hoduct		Select Calendar	54	elect PoC					
Select Pol	с							Selected F	PoC					
Available	Items							Selected	Items					
View +	Dimension	Find.	4		E Det	tach		View +	Dimension	Find	4	-	18	э
Label						-		Label						**
BR	A Brick & Mortar							J Brid	ck & Mortar					
BR	A Direct					1	ådd							
BR	A WholesaleFran	nchise					3 Add All							
🖌 Brid	ck & Mortar						& Bemove							
CA	Brick & Mortan						Remove All							
CA	Direct						off sellove ve							
CN	Brick & Mortar													
CN	Direct													
														10
	Use Drag ar nize Hierarchies	nd Drop to ac	5d Availa	ble iter	ns to Sele	cted item	is, tap on individual i	em and Add for Canc		vious	d All to	r all ite Boat		Einish

Figure 4–4 Workbook Wizard: Location Selection

The Enable OP Approval workbook is built.

MP Enable OP Approval

The Merch Plan step has one view: MP Enable OP Approval.

Select the week(s) by department that you want to enable Merch Plan users to submit and approve plans to the original plan. Once you are satisfied with the setting updates you have made, commit the workbook in order to retain your changes.

Figure 4–5 MP Enable OP Approval View

Location Product					alendar easure
	Find	- 🕹 😚	B 13	i i	XYZ »
	W1 of TY	W2 of TY	W3 of TY	W4 of TY	W5 of Ty
MP Op Approve Enabled			V	V	

Table 4–1 lists the measures available in this view.

Table 4–1 Allow OP App	roval View Measures
Measure	Description
MP OP Approve Enabled	Select this measure to enable Merch Plan users to submit and approve plans to the original plan.

LP Enable OP Approval

The Location Plan step has one view: LP Enable OP Approval.

Select the week(s) by department that you want to enable Location Plan users to submit and approve plans to the original plan. Once you are satisfied with the setting updates you have made, commit the workbook in order to retain your changes.

Figure 4–6 LP Enable OP Approval View

▲ LP Enable OP App	roval			•	₹ ₹
Brick & Mortar = 500 Women					alendar easure
	Find	• 4 6	B D] 💑	XYZ >>
	W1 of TY	W2 of TY	W3 of TY	W4 of TY	W5 of Th
LP Op Approve Enabled			V	V	
	<				
LP Enable OP Approval	· · ·				

Table 4–2 lists the measures available in this view.

 Table 4–2
 Allow OP Approval View Measures

Measure	Description
LP Op Approve Enabled	Select this measure to enable Location Plan users to approve plans to the original plan.

Load Validate Task

The MFP Maintenance activity consists of the following tasks:

- MFP Setup
- Location Setup
- Enable Op Approval
- Load Validate

This chapter focuses on the steps within the Load Validate task, which include:

- Actuals
- Merch Target
- Merch Plan
- Location Target
- Location Plan

To use the Load Validate task, you must first build the workbook.

Once built, the workbook contains all measures that are either loaded or touched during the batch calculation process, providing an avenue by which an administrator can verify data loads and batch processes.

Building the Workbook

To build a Load Validate workbook, perform the following steps:

1. Click the New Workbook icon in the Load Validate step.

Figure 5–1 Load Validate

Action
🔮 🖪 🖻
🔮 🖪 🖻
2 🕒 🖻
🖻 🖻 🖻
🔮 🕒 🖻
P 🕒 🖻
P 🕒 🖻
🔮 🕒 🖻

2. The Calendar Selection step appears. Select the years and click Next.

Workbook Wizard Saled PoC Select Product Select Calendar Select Calendar Selected Calendar Available Items Selected Items View + Dimension Find. 9 E Detact View + Dir Find. a Label Label H1 3LY HI TY VH2 TY H2 3LY HILLY > Add H2 LLY 3 Add Al HILY 4 Bem H2LY. 🛠 Remove All +HI TY VH2 TY HINY H2 NY Use Drag and Drop to add Available items to Selected items, use shift-click and Add for multiple selections, or Add All for all items 2 Synchronize Hierarchies Cancel Previous Next Einish

Figure 5–2 Workbook Wizard: Calendar Selection

3. The Location Selection step appears. Select the channel and click Next.

			Select C	alendar		Select PoC	Sel	ect Product						
elect Pol	C						Selected P	PoC						
Available	Items						Selected	Items						
View -	Dimension	Find	8 8	Detach			View -	Dimension	Find.	8			-	30
Label							Label							
BR	A Brick & Mortar				-	2 32	√ Bric	k & Mortar						
BR	A Direct				-	🔉 Add								
BR	A Wholesale/Fran	chise				🐌 Add All								
✓ Brid	k & Mortar					< Bemove								
✓ Brick & Mortar CA Brick & Mortar CA Direct						C Remove All								
CA	Direct					AP LOBIDOAD WE								
CN	Brick & Mortar													
CN	Direct				-									
														39
2 Synchror	Use Drag an IQE Hierarchies	id Drop to ad	id Available iten	ns to Selected I	tems	, tap on individual 6	m and Add for Cance		vicuus	a All fo	r all iter	ms.		Einish

Figure 5–3 Workbook Wizard: Location Selection

4. The Product Selection step appears. Select the items and click Next.

Figure 5–4 Workbook Wizard: Product Selection

			54	elect C	alendar	Select PoC	Sel	ect Product						
Select Pro	duct						Selected I	Product						
Available	Items						Selected	Items						
View -	Dimension	Find	8		🛃 Detach		View -	Dimension	Find.	4			6	39
Label							Label							Ŧ
10	Men's Footwea	t				> Add	₽ 50	0 Women's Casu	als Tradit	ional				
20	Women's Foot	wear												
30	Men's Casuals					>> Add All								
40	Mens Tops					Remove								
√ 50	Women's Casu	als Traditions	d i			Remove All								
50	Women's Casu	als Fast Fast	vion			S Remove As								
60	Women's Class	sics												
													0	
Services	Use Drag a lize Hierarchies	nd Drop to ad	d Availal	Die Rer	ns to Selected Item	is, tap on individual it	em and Add for	r multiple selection	ins, or Ad	3 All fo	r all iten	ns.		
at shining	and a sub-defendence													
							Canc	el Pre						

5. The Data Load Validation workbook is built.

Actuals

The Actuals step includes a single view of the same name, the Actuals view. Use this view to validate that the actuals data was loaded in the batch process.

- Actuals															
Lacation Product															
1000 Charles . (10001013	atten V Ned T	neter].													
	Find.	- 0	9 B	10 8	0.18.6	42 43									
	W07 st UV	WOR OF LY	W09 of LY	waa waxa	VOLVEY	AG5 NEX.	W03 of DY	904-et57	W05-etU/	W06 arts7r	W07 of LV	W98 of LY	W08 of LY	WREDFLY	WHE OF SY
To BOP Regiltratio C	21,074.40	30,303,17	19,04,00	11,03.78	24,727.46	21,442.77	22,198,022	20,088.03	22,979.21	21,501.91	20,453.46	19,255.01	23,852.76	22,775.00	21,443.02
Ty EOP Rep-Promo R	42348.79	40,404.34	39,049.78	37,853.56	48,282,90	48,005.52	44,396.03	41,737.06	40,052.41	41(01) 82	40,308-31	30,709.32	47,905.56	45,551.18	42,667.64
Ty DOP Registration U	105	100	817	10	1,018	1,000	1007	89	1,041	1,001	903	90	+,003	.1,001	1,011
Ty BOP OF C	20,740.77	20,016.63	10,308.52	10,000.04	24,007.48	23,306.98	21,003.04	30,544,74	22,555.36	21,221.49	19,522.76	19,101.14	22,864.17	22,449.00	20233
Ty BOP OF A	41,481.53	40,079.28	38,779.05	37,337 M	40,214.30	45,013.00	43,795,07	41,029.47	45,710.70	42,402.56	38,647.51	38,362.27	47,008.33	44,025.30	42,343.47
TV BOP OF U	945	801	.915	1912	1,004	1,035	909	301	1,029	983	367	907	1,000	1,040	1,00
To Mac Adj R	-	91,98	1.00	112.00	16.95	41.40	167.71	178.06	112.95	100.10	86.13	83.52	12.05	138.75	817
Ty Mexi Adji U	1			1	1.14		2	3	2	2			14	1	1
Ty Markdown Rag-Frons R	214.00	122.36	104.18	80.70	107.05	106.00	333.45	140.02	375.58	242.90	121.00	140.01	10.14	228.63	212.11
Ty Markdown Or R	88.30	38.29	3414	23.05	28.23	37.55	10.09	#1.07		10.26	23.58	40.96	21.96	87.53	83.00
Ty Markdown-due to VVP R	8.00	-100	1.05	0.06	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8.00	3.00	0.00
Ty MOSIC	36.01	21.77	28.33	25.47	17.66	98.45	29.05	36.62	43.41	24.01		21.80	0.00	40.24	22.00
Ty MOS R	79.01	43.51	40.05	40.94	35.11	38.05	59.09	71,84	86.81	46.02	12.32	43.19	8.00	85.47	44.00
Ty MOS U				1 19	3		1								1
Ty Receipts C.	2,672.09	4.00	3.00	0.06	4,013.38	10.00	0.00	0.00	4,008.87	0.00	0.00	0.00	5,345.15	8.00	0.00
Ty Recepts #	5.345.17	4.00	8.00	0.00	12,039.40	0.00	8.00	9.00	0,017.74	0.00	0.00	0.00	10,680.30	11.00	0.00
Ty Receipts U	80	0			165		0	0	120	0	0		140		
Ty Royatest N	72.52	39.60	68.25	0.77	57.50	40.04	43.05	13.00	01.22	110.40	11142	35.36	98.42	19.30	97.00
To Returns Registronic R	270.67	136.57	144.05	143.05	198.36	196.03	200.08	201.04	455.40	275.46	20.31	142.50	145.00	275.27	204.02

Figure 5–5 Actuals View

Table 5–1 Actuals View Worksheet Measures

Measure	Description
Ty Sales Reg+Promo R	This Year Reg+Promo Sales Retail
Ty Sales Reg+Promo U	This Year Reg+Promo Sales Units
Ty Sales Clr R	This Year Clearance Sales Retail
Ty Sales Clr U	This Year Clearance Sales Units
Ty Returns Reg+Promo R	This Year Reg+Promo Returns Retail
Ty Returns Reg+Promo U	This Year Reg+Promo Returns Units
Ty Returns Clr R	This Year Clearance Returns Retail
Ty Returns Clr U	This Year Returns Clearance Units
Ty Markdown Reg+Promo R	This Year Markdown Reg+Promo Retail
Ty Markdown Clr R	This Year Markdown Clearance Retail
Ty Markdown due to W/F R	This Year Markdown W/F Retail
Ty EOP Reg+Promo C	This Year Reg+Promo End of Period Inventory Cost
Ty EOP Reg+Promo R	This Year Reg+Promo End of Period Inventory Retail
Ty EOP Reg+Promo U	This Year Reg+Promo End of Period Inventory Unit
Ty EOP Clr C	This Year End of Period Inventory Clearance Cost
Ty EOP Clr R	This Year Clearance End of Period Inventory Retail
Ty EOP Clr U	This Year Clearance End of Period Inventory Unit

Measure	Description
Ty Receipts C	This Year Receipts Cost
Ty Receipts R	This Year Receipts Retail
Ty Receipts U	This Year Receipts Units
Ty Shrink C	This Year Shrink Cost
Ty Shrink R	This Year Shrink Retail
Ty Shrink U	This Year Shrink Units
Ty MOS C	This Year Marked Out of Stock Cost represents the Cost value of inventory reductions other than markdowns or sales.
Ty MOS U	This Year Marked Out of Stock Units represents the Units value of inventory reductions other than markdowns or sales.
Ty Misc Adj C	This Year Miscellaneous Adjustments Cost
Ty Misc Adj U	This Year Miscellaneous Adjustments Unit
Ty Royalties R	This Year Royalties Retail
Ty Vendor Funds R	This Year Vendor Funds (Rebates + Deals) Retail
Ty W/F Markdown R	This Year Wholesale Franchise Markdown Retail
Ty W/F Markup R	This Year Wholesale Franchise Mark Up Retail
Ty Cons Inv C	This Year Consignment Inventory as % of Total EOP Cost

Table 5–1 (Cont.) Actuals View Worksheet Measures

Merch Target

The Merch Target step includes a single view of the same name, the Merch Target view.

» Merch Target															
Location Product															
Bold & Morter	ry Camaria Tuarr	tonal].													
	Fint.	- 4	9 10	10 1		a 41 ol									
	W07 eftor	WOS of LY	WORKLY	Aldo NLPA	AGY REA.	WOD MLY	ARD NEA	WOR of LY	W05 of LY	WORLEY	W07-erLY	M06-NLFA.	WOB #FLY	WeberLY	WHI at LY
Vilji (DOP Regii Franci R	22,900,753	25,338,894	21,965,967	22,049,263	21,013,000	27,140,964	28,152,281	25,010,771	21,538,461	27,728,300	3591071.	24,415,992	22,918,533	28,453,364	27,771,498
Visition Pagehrons U	508,345	814,738	195,624	677,028	101,206	054,374	030,545	821,006	\$199,503	674,002	040,420	404,000	601,036	715,007	890,02
We BOP OF R	22,453,417	25,008,731	20,794,000	22,534,463	21,508,504	26,308,012	25,947,638	24,798,496	23,229,013	27,318,621	25,641,200	24,20(1079	22,521,468	29,075,667	37,420,494
We BOF OF U	882,598	609,763	500,041	\$73,760	838,574	650,953	606,190	818,208	534,504	M68,511	941,212	812,000	587,240	711,382	594,01
N9 207 R	45,962,171_	90,245,638	47,870,797	45,482,727	43,422,015	94,075,957	12,109,019	48,700,287	46,767,497	55,048,922	51,513,379	48,322,871	45,539,399	10,029,972	85,991,043
Ve BOPU	1,131,044	1,224,496	1,103,872	1,150,708	1,110,400	1,306,327	1,275,305	1,240,074	1,194,407	1,340,340	1,291,928	1,244,454	1,210,076	1,425,999	1,374,00
We BOP C	22,691,098	25,172,828	21.005,368	22,741,374	21,711,418.16	27.037.008	20.054,970	24,000,744	23,380,790	27,523,472	25,910,001	24,207,646	22,778,010	29,314,947	27,006,002
Wg-Cone Inv M	0.00	0.00	0.00	0.00	0.06	0.00	8.00	2.00	0.00	8.00	0.00	0.90	0.00	0.00	0.0
rep sciP Reg-Promo C	12,688,457	11,962,937.28	1,00,37.27	10,967,000	12,574,407	13,079,148	12,505,391.51	11,759,347.70	13,864,155	12,303,442	12,208,001	11,450,272.00	14,728,387	13,085,734	12,800,757
Vip 2017 Registration R	25,338,904	20,005,003	22,948,263	21,010,000	27,140,964	26.152,281	25,010,771	22,538,485	27,728,380	25,579,075	34,415,982	22,914,530	20,453,904	27,711,468	25,801,500
We BOP Regiment	814,738	100,521	\$77,526	161,258	854,374	629,145	621,006	599,503	674,832	640,425	624,588	801,036	715,607	690,020	601,01
VID BOP OF C	12,504,371	11,052,411.00	11,317,236.00	10,004,417	13,463,301	12,070,024	12,384,712	11,014,912.07	13,899,216	12,820,558	12,952,444	11,200,730.36	14,587,048	13,710,248	12736.042
Visition Calif.	25,008,751	23,794,993	12,834,463	21,000,024	28.836,692	25,987,538	24,789,496	21,229,013	27,318,621	25,041,108	24,108,879	22,825,485	29,175,987	37,420,404	35,473,373
We BOP CE U	805,790	500,041	673,768	850,174	650,953	630,790	615,200	594,524	862,511	640,000	813,000	597,240	711,002	604,010	894,98
VID ECP R	10.3HLEN	47,570,797	45,482,727	43,422,015	\$4075,887	10.100.91% -	48,700,267	48,797,497	65,048,922	\$1,818,979	48,523,871	45,538,999	\$6,829,672	15,191,341	11,234,577
NG BOP U	1,224,496	1,983,872	1,150,706	101000	1,305,327	1,275,305	1,240,074	1,194,407	1,340,343	1,211,625	1,244,454	1,790,076	1,425,089	1,374,630	1,316,00
We BOP C	28,172,828	23,695,398	22,741,374	379,418.18	27,037,808	38,054,070	24,000,144	20,000,780	27,523,472	25,010,001	24,281,448	22,711,010	20,214,647	27,985,962	25,967,298
We her All C	-47,03.49	1,322,079.01	1,003,714.48	1,000,545,67	-2,118,200.24	914,219.71	1,152,540.01	1,400,318.00	-1,112,110.00	1,689,702.81	1,527,725.62	1.67177637	-2.500,628 78	1,000,470.45	1,007,005.0
No tri Ad II	the state and who	4.371.040.35				-									-

Figure 5–6 Merch Target View

Merch Plan

The Merch Plan step includes a single view of the same name, the Merch Plan view.

< Merch Plan													
Location Product													
Bill & Motor . 20018 SA	et Silaeve Tees].												
	Find	- 4		12		41 08							
	W27 of LV	W28 of LY	W29 of LY	W00 of LY	W01 of LV	W02 of LY	W33 of LY	W04 of UY	W05 of LY	M06 of LY	W07 at LV	W00 of LY	W09 at LV
Vip BCP Reg+Promo R	2,096,071.66	2,207,336.76	2,116,872.49	2,041,649.31	1,966,632.53	2,568,452.83	2,493,733.15	2,258,991 28	2,209,748.24	2,490,016.17	2,282,146.74	2,130,022.42	2,039,527.94
Vip BOP Regiltrone U	54,372	16,657	55,264	54,120	52,994	63,349	62,199	60,184	. 57,901	62,423	59,848	57,516	58,12
VID BOP OF R	2,028,175.91	2,376,825.85	2,101,519.70	2,026,705.11	1,961,270.88	2,553,265.24	2,478,548.43	2,329,040.19	2,178,607.90	2,404,639.05	2,252,296 78	2,099,218.98	2,024,199.24
Ve BOP CR U	\$3,362	56,190	55,039	13,901	62,752	63,122	81,579	58,708	\$7,426	81,691	59,391	57,062	55,911
VIE BOP R	4,125,247.57	4,364,162.61	4,218,382.19	4,068,354.42	3,917,903.21	5,121,218.07	4,972,361.58	4,509,031 37	4,308,205.14	4,054,555.22	4,534,433.52	4,229,239.40	4,063,687.11
VIE BOP U	107,734	112,847	190,303	108,021	105,736	128,471	124,178	119,072	115,307	124,314	118,239	114,578	112,043
VIE BOP C	2,082,824.85	2,192,082.18	2,108,196.06	2,034,178.00	1,958,952.47	2,560,859.90	2,406,191.57	2,344,516.81	2,194,170.00	2,427,328.46	2,267,217.64	2,114,820.49	2,031,844.40
Vib EOP Reg+France R	2,207,338.76	2,116,872.48	2,041,649.31	1,966,832.53	2,568,452.83	2,493,733.15	2,258,995.78	2,209,748.24	2,450,016.17	2,282,148.74	2,130,022.42	2,039,527.94	2,596,304.84
Vip EOP Reg+Prono U	56,657	55,284	\$4,120	52,904	63,349	62,199	60,164	57,901	62,423	59,540	\$7,518	56,129	65,23
We BOP OF U	56,190	55,009	53,901	\$2,752	63,122	61,979	58,700	57,426	61,691	59,201	57,062	55,913	65,010
VIE EOP OF R	2,178,825.85	2,901,519.70	2,026,705.11	1,965,270.68	2,553,265.24	2,478,648.43	2,329,040.19	2,178,607.90	2,404,639.05	2,252,286.79	2,099,256.30	2,024,959.24	2,551,685.03
VID EOP H	4,364,152.61	4,218,392.19	4,068,384.42	3,917,903.25	5,121,718.07	4,972,381.58	4,689,031.97	4,388,356.54	4,854,885.22	4,534,433.52	4,229,239.40	4,063,687.58	5,117,989.88
VIE EOP U	112,847	110,303	108,021	105,736	126,471	124,178	118,672	115,327	124,114	119,239	314,578	112,042	130,236
VIE BOP C	2,192,082.18	2,109,196.06	2,034,178.00	1,958,952.47	2,565,859.90	2,406,191.57	2,344,516.81	2,194,178.36	2,427,328.48	2,267,217.64	2,114,620.49	2,031,844.46	2,558,995 IN
Vip Comp Sales IV	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
VID OM R	60,118.12	26,205.37	26,330.45	26,296.09	26,957.96	26,282.96	50,120,19	50,151.25	74,584.53	50,192.09	50,290.81	26,600.17	26,857.00
Vigitivy Adj P	110,992.87	-90,464.27	-74,555.95	-75,016.78	601,057.36	-74,219.88	-132,721.30	-150,243.54	239,809.70	-167,070.33	-152,124.32	-90,494.40	526,775.90
We lev Adl U	2,278	-1,293	-1,528	-4,08	10,346	-1,550	-2,012	-2,263	4,511	-2,552	-2,332	-1,267	9,007
Vip Markdown Cir R	3,219.08	1,681-20	1,825.82	1,652.37	1,662.15	1,596.83	3,108.14	3,204.73	4,358.12	3,158.02	3,319,25	1,645.25	1,584.0

Figure 5–7 Merch Plan View

Location Target

The Location Target step includes a single view of the same name, the Location Target view.

Location Target						
Location Product						
	Find	- 4	∂ ₽		ž m 🔒	4 ₽ 4 ₽
	W27 of LY	W28 of LY	W29 of LY	W30 of LY	W31 of LY	W32 of LY
Wp Markdown R	11,216.99	9,314.15	9,683.86	8,321.43	15,464.83	8,270.60
Wp Returns R	12,371.01	11,831.36	10,706.57	10,202.23	3 20,453.00	10,570.75
Wp Returns U	532	567	531	529	9 1,244	518
Wp Sales R	92,656.30	88,427.35	80,971.93	77,319.62	2 143,393.44	76,511.56
Wp Sales U	3,932	4,231	3,984	3,965	9,168	3,830

Figure 5–8 Location Target View

Location Plan

The Location Plan step includes a single view of the same name, the Location Plan view.

Figure 5–9 Location Plan View

Location Product								
	Find	- 4	∂ B ?	ES 🛛 🤅)	48 48		
	W27 of LY	W28 of LY	W29 of LY	W30 of LY	W31 of LY	W32 of LY	W33 of LY	W34 of LY
Wp BOP C	446,839.19	490,746.54	467,171.96	447,248.19	428,727.33	523,775.20	506,188.09	485,091.6
Wp BOP R	893,678.23	981,492.92	934,343.78	894,496.23	857,454.48	1,047,550.28	1,012,375.99	970,183.0
Wp BOP U	18,971	20,364	19,728	19,206	18,709	21,597	21,130	20,57
Wp EOP C	490,746.54	467,171.96	447,248.19	428,727.33	523,775.20	506,188.09	485,091.63	458,209.8
Wp EOP R	981,492.92	934,343.78	894,496.23	857,454.48	1,047,550.28	1,012,375.99	970,183.08	916,419.5
Wp EOP U	20,364	19,728	19,206	18,709	21,597	21,130	20,576	19,853
Wp Markdown due to W/F R	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Create Merch Plan Targets Task

The Merch Targets role is usually associated with senior and middle management in the merchandise planning organization. The overall goal of the Merch Targets user is to develop strategic and department-level targets that set the financial guidance for the planning organization.

Merch Targets users typically begin planning two to three years before the planning period. This is known as pre-season planning. During this time, Merch Targets users create the Merchandise Financial Plan for the season or for the entire year.

When Merch Targets users open MFP in the RPAS Fusion Client, they are presented with the activity called Create Merch Plan Targets and task of the same name. This task belongs solely to the Merch Targets user. It includes the following four steps:

- Create Targets
- Review and Publish Targets
- Review and Approve Plan
- In Season Review and Re-Project Targets

The first two steps are related to the pre-season creation and publication of targets to the Merch Planner. The third step involves reviewing and approving or rejecting plans submitted by the Merch Plan role. The fourth step is used for in-season adjustments to targets. These tasks and steps are shown in Figure 6–1.

Figure 6–1 Merch Targets Role View: Task and Steps

厚 Create Merch Plan Targets	
🖹 Create Merch Plan Targets	
Task or Step	Action
🖌 📋 Create Merch Plan Targets	🔮 🖪 🖻
Create Targets	🖻 🖻 💋
Review and Publish Targets	🖻 (B 💋
Review and Approve Plan	🖻 🖪 💋
In Season Review and Re-project Targets	🕒 🕒 🙆

The Merch Targets user must complete the first three steps to publish the strategic targets to the Merch Plan user. To do this, the Merch Targets user must first build the workbook.

Building the Workbook

To build the Merch Targets role workbook, complete the following steps.

1. Click the **Create New Workbook** icon in the Create Merch Targets task.

Figure 6–2 Create New Workbook Icon



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

Figure 6–3 Workbook Wizard: Calendar Selection

elect Calen	dar		Sel	ect Calendar							
elect Calen	dar			der carpenant	Select PoC	Sele	d Product				
						Selected (Calendar				
Available Ite	ms					Selected	Items				
View - 0	Dimension	Find	4 4	Detach		View -	Dimension	Find	8	2 2	,
Label						Label					
H1 3LY	8					✓H1	TY				
H2 3LY	8					VH2	TY				
HILLY	8				> 944						
H2 LLY	i i i				30 Add All						
HILY					& Remove						
H2 LY											
✓H1 TY					Kemove All						
VH2 TY											
H1NY											
H2 NY											

3. The Location Selection step of the workbook wizard is displayed. Select the channels you want to plan and move them to the Selected Items box. Click **Next**.

		C	<u></u>	_			-0						
	S	elect Ca	alendar		Select PoC	Sel	ect Product						
Select Channel						Selected (Channel						
Available Items						Selected	tems						
View * Dimension Find.	•	û	d Detach	ı		View -	Dimension	Find	♣	û	ė	10	
Label			•			Label						-	
BRA Brick & Mortar				~		🗸 Brid	ck & Mortar						
BRA Direct					<u>A</u> dd								
BRA Wholesale/Franchise					🔉 Add All								
✓ Brick & Mortar					Remove								
CA Brick & Mortar													
CA Direct					C Re <u>m</u> ove All								
CN Brick & Mortar													
CN Direct				~									

Figure 6–4 Workbook Wizard: Location Selection

4. The Product Selection step of the workbook wizard is displayed. Select the location you want to plan and move it to the Selected Items box. Click **Finish**.

Figure 6–5 Workbook Wizard: Product Selecti

			9	elect C	alendar	Select.PoC	Sek	ect Product						
Select Pro	oduct						Selected I	Product						
Available	Items						Selected	Items						
View -	Dimension	Find	4		🛃 Detach		View -	Dimension	Find.	4			-	30
Label							Label							
1.00	0 Men's Footwear					S Add	√ 500	0 Women's Casi	uals Tradit	Ional				
	0 Women's Foote					3 Add All								
30	0 Men's Casuals					30 ADD AB								
	0 Mens Tops					& Bemove								
	0 Women's Casu					C Remove All								
50	5 Women's Casu	als Fast Fast	nion											
60	0 Women's Class	sics												
														ж
2 Sinchro	nize Hierarchies	nd Drop to ad	id Availa	Die Der	ms to Selected Item	s, tap on individual it	tem and Add for	multiple select	ons, or Ad	d All to	r all the	ms.		
and excercise														

The Merch Targets role workbook is built, and the Initialize view opens.

Create Targets

This section provides details about creating targets.

Seed Plan

The first action that the Merch Target users complete when creating new targets is to seed the plan with the Initialize view.

This view is found under the first tab within the Create Targets Step, Seed Plan.

Figure 6–6 Create Targets - Seed Plan: Initialize Plan View

🔺 Initialize				
Location Produc				
Brick & Mortar 🖕 500 Wome	en's Casuals Traditional			
	Find	- 🦆 🔓 🖽		
	H1 TY	H2 TY		
Wp Seed Source	Last Year	Last Year		
Wp Seed Info	Ly:05 Feb 2020 : adm	Ly : 05 Feb 2020 : laura		

Table 6–1 Top Down Initialize Plan Measures

Description				
The seed source used to seed the working plan. Use this option to seed or not seed the working plan. You can seed with Last Year's (Ly) or Forecast (Fcst) data. Or, you can choose the Blank option if you do not want to seed the working plan.				
Includes a few pertinent facts about the last time that the Seed custom menu was executed: last seed source concatenated with last seeded date and the last user to seed.				
If blank, then the given intersection has never been seeded.				

With this view, you can choose to seed your plan with Last Year (Ly) or Forecast (Fcst) data to create a demand curve on which to spread the new plan's initial targets. Or, you can instead choose to not seed the plan, which allows you to create a plan that is not influenced by last year's performance or forecast (plus last year's performance).

In the preceding example, both Half1 and Half2 have been selected to be seeded for the Brick & Mortar channel for the 500 Women's Casuals Traditional department.

Seeding the Plan

When seeding the plan, you can choose which information is seeded. For instance, you can seed just one half or all halves in the task, as shown in Figure 6–6. You can also choose what locations and products to seed.

There are two ways you can seed. You can seed each level individually or you can seed several levels at once by changing the dimension level shown in the view.

Seeding One Level at a Time As shown in Figure 6–6, only the Brick & Mortar channel and the 500 Women's Casual Traditional division have been selected to be seeded with Ly data. This means that the other product divisions have not been selected to be seeded yet. To seed the next division in the Product dimension within the Brick & Mortar channel, complete the following steps:

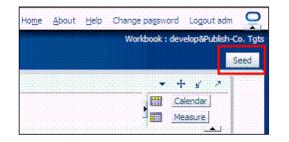
- 1. Click within the dimension field that you want to change, as shown in Figure 6–7.
- Click the Next or Previous arrow, as shown in Figure 6–7. 2.

Figure 6–7 Change a Dimension Level with Page Arrows

🔺 Initializ	e				
🛄 Locatio	on Product	< < > >			
Brick & Morta	r 🖕 500 Women's	Casuals Tradition	nal		

- The page refreshes and the next division in the Product dimension is displayed in 3. the page edge. Note that the Seed Source measure is no longer populated.
- 4. Select the half that you want to seed with Ly or Adj Forecast.
- 5. Click the Next arrow to view and seed the next division.
- When you have selected all the data you want to seed, click **Seed** in the top right 6. corner.

Figure 6–8 Seed Button



7. A confirmation message is displayed, stating that the data has been successfully seeded. Click OK.

Figure 6–9 Seeding Success Message

Custom Menu Response	0
Seeding completed successfully!	
	ОК

After you have seeded, the view refreshes and the Seed Info measure contains the last seed source concatenated with the last seeded date and the last user to seed.

Seeding Several Levels at Once If you want to seed several locations and several products at once, you may want to change the level of the dimensions shown in the page edge.

The default setting of the Initialize Plan view is set to show the Calendar dimension at the half level, the Location dimension at the channel level, and the Product dimension at the division level.

To change the dimension level shown in the page edge or grid, complete the following steps:

1. Click the dimension tile of the dimension level you want to change.

Figure 6–10 Location Dimension Tile

41	nitialize		
	Location	Product K	< > >
Bric	k & Mortar 📕	500 Women's Casu	als Traditional

2. The dimension window is displayed. Select the level of the dimension that you want to appear in the page edge. If you want to view more than one level at a time in the page edge or grid, select multiple levels. In Figure 6–11, Channel was deselected and all [Location] was selected instead.

Figure 6–11 Location Dimension Window

Initialize -	Location
Levels	Show Attributes and Sort Show and Hide
Display 🍥	Block View Outline View
Select 💌	Levels
	🖌 📄 Channel
+ -	🖌 🖵 Chain
+ -	🔺 🖵 Company
+ -	└── all [Location]
+ -	🔺 🖵 Chain Group
+ -	└ 📝 all [Location]
+ -	Currency
+ -	Lecation]

- **3.** Click **OK** when finished.
- **4.** Repeat steps 1 through 3 for other dimensions, if desired.
- **5.** After the dimensions are at the level you want, select the halves that you want to seed.

In Figure 6–12, both the Location and Product dimensions are at All, and the halves Half1 FY2020 and Half2 FY2020 have been set to seed from last year.

6. When you have selected all the data you want to seed, click **Seed** in the top right corner, as shown in Figure 6–12.

▲ Initialize $|\langle \langle \rangle \rangle|$ Location Product all [Location] all [Product] Find... Ð Ŷ 1 H1 TY H2 TY Wp Seed Source Ly : 05 Feb 2020 : Ly : 05 Feb 2020 : laura Wp Seed Info adm

Figure 6–12 Seed Several Levels at Once

7. The view refreshes and the Seed Info measure contains the last seed source concatenated with the last seeded date and the last user to seed. A confirmation message is displayed, stating that the data has been successfully seeded. Click **OK**.

Figure 6–13 Seeding Success Message

O
ок

After you have seeded the divisions, continue to the next step: Sales/Markdowns.

Sales/Markdowns

After you have seeded, develop the sales and markdown targets for those departments. The second tab within the Create Targets step, Sales and Markdowns, has one default view: Sales and Markdowns.

Location Production	K<>>									
Brick & Mortar 🖕 500 Wome	en's Casuals Traditi	ional								
	Find	- 4	∂ ₿		ž xvz 🕃	<u>}</u> •2 •3				
	2/8/2020	2/15/2020	2/22/2020	2/29/2020	3/7/2020	3/14/2020	3/21/2020	3/28/2020	4/4/2020	4/11/2020
Wp Sales R	870,500.39	1,061,633.94	1,269,472.86	1,471,233.07	1,084,892.53	923,938.01	903,281.57	832,949.16	833,659.18	1,121,844.63
Fost Sales R	1,524,764.46	1,524,764.46	1,524,764.46	1,524,764.46	1,524,764.46	1,524,764.46	1,524,764.46	1,524,764.46	1,524,764.46	1,524,764.46
Wp Sales R var Fcst %	-42.9 %	-30.4 %	-16.7 %	-3.5 %	-28.8 %	-39.4 %	-40.8 %	-45.4 %	-45.3 %	-26.4 %
Ly Sales R	870,500.39	1,061,633.94	1,269,472.86	1,471,233.07	1,084,892.53	923,938.01	903,281.57	832,949.16	833,659.18	1,121,844.63
Wp Sales R var Ly %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Wp Net Sales R	522,339.25	631,714.03	749,886.42	865,378.16	644,704.67	552,507.28	541,569.37	502,275.30	502,505.51	998,324.59
Ly Net Sales R	522,339.25	631,714.03	749,886.42	865,378.16	644,704.67	552,507.28	541,569.37	502,275.30	502,505.51	998,324.59
Wp Net Sales R var Ly %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Wp Net Sales C	261,176.86	315,864.32	374,951.09	432,697.33	322,359.74	276,260.92	270,791.99	251,145.20	251,259.86	499,169.87
Ly Net Sales C	261,176.86	315,864.32	374,951.09	432,697.33	322,359.74	276,260.92	270,791.99	251,145.20	251,259.86	499,169.87
Wp Net Sales C var Ly %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Wp Markdown R	65,732.68	78,485.05	94,704.21	108,427.08	80,528.71	68,710.72	67,060.09	62,571.55	61,649.01	123,536.47
Wp Markdown R %	12.6 %	12.4 %	12.6 %	12.5 %	12.5 %	12.4 %	12.4 %	12.5 %	12.3 %	12.4 %
Ly Markdown R	65,732.68	78,485.05	94,704.21	108,427.08	80,528.71	68,710.72	67,060.09	62,571.55	61,649.01	123,536.47

Figure 6–14 Sales and Markdowns View

If the Wholesale Franchise or Local Currency options are provisioned, then there are additional views to support planning sales and markdowns specifically catered to those options:

W/F - Sales and Markdowns

			1				
W/F - Sales and Ma	rkdowns						
Location Product	IC < > >I						
Brick & Mortar 300 Men's Ca	asuals						
	i i i i i i i i i i i i i i i i i i i						
	Find	• 🕹	1		in 192 🖥	0 2 0 3	
	2/8/2020	2/15/2020	2/22/2020	2/29/2020	3/7/2020	3/14/2020	3/21/2020
Wp W/F Sales R	151,158.79	237,577.40	280,825.96	323,843.83	233,237.26	169,703.50	169,956.9
Ly W/F Sales R	158,716.73	249,456.27	294,867.26	340,036.02	244,899.12	178,188.68	178,454.7
Wp W/F Sales R var Ly %	-4.8 %	-4.8 %	-4.8 %	-4.8 %	-4.8 %	-4.8 %	-4.8 9
Wp W/F Net Sales R	151,158.79	237,577.40	280,825.96	323,843.83	233,237.28	169,703.50	169,956.9
Wp W/F Net Sales R %	100.0 %	100.0 %	100.0 %	100.0 %	100.0 %	100.0 %	100.0 9
Ly W/F Net Sales R	158,716.73	249,456.27	294,867.28	340,036.02	244,899.12	178,188.68	178,454.7
Ly W/F Net Sales R %	100.0 %	100.0 %	100.0 %	100.0 %	100.0 %	100.0 %	100.0 9
Wp W/F Net Sales R var Ly %	-4.8 %	-4.8 %	-4.8 %	-4.8 %	-4.8 %	-4.8 %	-4.8 9
•							
Wp W/F Markup R %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 9
Wp W/F Markup R	0.00	0.00	0.00	0.00	0.00	0.00	0.0
Ly W/F Markup R %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 9
Ly W/F Markup R	0.00	0.00	0.00	0.00	0.00	0.00	0.0
Wp W/F Markup R var Ly %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 9
	<						

Figure 6–15 W/F - Sales and Markdowns View

Local - Sales and Markdowns

Seed Plan Sales	s/Markdowns	Inver	tory/Receipts	Gross/Ne	t Margin		
Local - Sales	and Markdo	wns					
Location Pr Brick & Mortar = 300		> >					
	Find		• 4	† B	III 🖪	🌼 💷 🖞	-
	2/8/2	020	2/15/2020	2/22/2020	2/29/2020	3/7/2020	3/14/2020
Wp Sales LR	283,4	122.73	445,457.59	526,548.70	607,207.13	445,271.29	323,979.40
Ly Sales LR	283,4	422.73	445,457.59	526,548.70	607,207.13	445,271.29	323,979.40
Wp Sales LR var Ly 9	6	0.0 %	0.0 %	0.0 %	0.0 %	6 D.D %	0.0 %
5							
Wp Net Sales LR	151,1	158.79	237,577.40	280,825.96	323,843.83	3 233,237.28	169,703.50
Ly Net Sales LR	158,7	716.73	249,456.27	294,867.26	340,036.02	2 244,899.12	178,188.68
Wp Net Sales LR var	Ly %	4.8 %	-4.8 %	-4.8 %	-4.8 %	-4.8 %	-4.8 %
Wp Net Sales LC	75,8	580.30	118,789.61	140,413.87	161,922.83	116,619.50	84,852.68
Ly Net Sales LC	79,3	359.32	124,729.09	147,434.56	170,018.97	7 122,450.48	89,095.31
Wp Net Sales LC var	Ly %	4.8 %	-4.8 %	-4.8 %	-4.8 %	-4.8 %	-4.8 %
2							
Wp Markdown LR %	14	2.6 %	12.7 %	12.4 %	12.6 %	12.6 %	12.5 %
Wp Markdown LR	18,6	991.88	30,219.05	34,892.52	40,646.70	29,338.65	21,292.75
Ly Markdown LR	19,6	941.47	31,730.00	36,637.15	42,679.04	30,805.58	22,357.39
	<						

Figure 6–16 Local - Sales and Markdowns View

Inventory/Receipts

The third tab within the Create Targets step, Receipts and Inventory, has one view: Receipts and Inventory.

Location Product	K<>>									
Brick & Mortar 🝵 500 Wome	n's Casuals Tradil	ional 🖕								
	Find	- 🌵	∂ ₿		💥 xvz 🕻	n				
	2/8/2020	2/15/2020	2/22/2020	2/29/2020	3/7/2020	3/14/2020	3/21/2020	3/28/2020	4/4/2020	4/11/2020
Wp BOP C	27,191,989	26,918,700	26,585,262	28,151,891	27,688,971	27,349,443	27,060,332	29,065,692	28,805,016	28,544,223
Ly BOP C	20,649,447	20,016,456	19,286,217	22,284,906	21,268,302	20,482,068	19,833,252	23,915,490	23,491,143	22,918,617
*										
Wp Net Sales C	261,176.86	315,864.32	374,951.09	432,697.33	322,359.74	276,260.92	270,791.99	251,145.20	251,259.86	499,169.87
Ly Net Sales C	261,176.86	315,864.32	374,951.09	432,697.33	322,359.74	276,260.92	270,791.99	251,145.20	251,259.86	499,169.8
Wp Net Sales C var Ly %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
5									90	
Wp Receipts C	0.00	0.00	1,966,162.17	0.00	0.00	0.00	2,287,379.89	0.00	0.00	0.0
Ly Receipts C	0.00	0.00	1,966,162.17	0.00	0.00	0.00	2,287,379.89	0.00	0.00	0.0
Wp Receipts C var Ly %	-100.0 %	-100.0 %	0.0 %	-100.0 %	-100.0 %	-100.0 %	0.0 %	-100.0 %	-100.0 %	-100.0 %
										-
Wp Shrink C	1,711.09	2,696.10	3,985.58	5,512.61	2,723.81	2,080.78	1,367.45	1,304.49	1,287.41	8,067.2
Ly Shrink C	1,711.09	2,696.10	3,985.58	5,512.61	2,723.81	2,080.78	1,367.45	1,304.49	1,287.41	8,067.2
Wp Move to Clr C	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0
Ly Move to Cir C	-251,474.78	-305,368.80	1,570,979.25	-423,786.45	-311,977.87	-261,789.96	2,097,406.42	-158,060.89	-234,111.60	-490,870.8
Wp MOS C	1,689.37	3,024.76	4,987.76	6,259.51	2,892.58	1,649.27	1,520.89	1,099.25	1,053.90	8,649.8
Ly MOS C	1,283.17	2,238.20	3,571.01	5,208.87	2,311.32	1,277.17	1,145.95	1,003.62	949.05	7,629.6

Figure 6–17 Receipts and Inventory View

Gross/Net Margin

After you have seeded, develop the sales and markdown targets for those departments. The last tab within the Create Targets step, Gross Margin, has one default view: Gross Margin.

Brick & Mortar = 500 Women	Cosuels Traditio									
	Find	- J			č 🚾 🕅	କ କାହ କାଣ				
	W1 of TY	W2 of TY	W3 of TY	W4 of TY	W5 of TY	W6 of TY	W7 of TY	W8 of TY	W9 of TY	W10 of TY
Wp GM R	2 162 524 36	2 247 466 12	2,299,543.32	2 195 493 02	1 309 141 81	1 059 409 17	966,724.46	819,044.88	743 107 68	1,313,224.34
Wp GM R %	1									
wp own k to	394.3 %	338.8 %	292.0 %	241.6 %	206.7 %	182.6 %	170.0 %	155.3 %	140.8 %	125.3 %
Ly GM R	217,881.64	262,066.37	307,998.95	354,513.71	267,813.95	230,698.46	227,547.95	211,420.85	211,949.96	406,614.30
Ly GM R %	41.7 %	41.5 %	41.1 %	41.0 %	41.5 %	41.8 %	42.0 %	42.1 %	42.2 %	40.7 %
Wp GM R var Ly %	892.5 %	757.6 %	646.6 %	519.3 %	422.4 %	359.2 %	324.8 %	287.4 %	250.6 %	223.0 %
Wp Vendor Funds R	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Ly Vendor Funds R	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Wp Royalties R	22,292.01	27,006.78	32,320.76	38,023.46	27,283.15	23,583.21	23,022.58	21,356.17	21,158.70	28,550.35
Ly Royalties R	30,756.97	37,262.09	44,593.95	52,462.15	37,643.41	32,538.48	31,764.97	29,465.77	29,193.32	39,391.80
•										
Wp Net GM R	2,181,297.75	2,268,176.38	2,321,488.63	2,220,506.09	1,420,418.57	1,079,570.28	986,593.47	838,123.15	762,083.76	1,323,870.73
Wp Net GM R %	397.7 %	342.0 %	294.8 %	244.4 %	209.8 %	186.1 %	173.5 %	158.9 %	144.4 %	126.3 %
Ly Net GM R	246,072.65	294,852.57	345,451.78	396,559.13	300,835.14	260,682.88	257,021.37	238,879.65	239,245.43	430,748.20
Ly Net GM R %	47.1 %	46.7 %	46.1 %	45.8 %	46.7 %	47.2 %	47.5 %	47.6 %	47.6 %	43.1 %
Wp Net GM R var Ly %	786.4 %	669.3 %	572.0 %	459.9 %	372.2 %	314.1 %	283.9 %	250.9 %	218.5 %	207.3 %
Wp Net Sales R	548,456,21	663,299.73	787,380.74	908,647.07	676,939.90	580,132.64	568,647.84	527,389.07		1,048,240.82

Figure 6–18 1. Gross Margin View

If the Wholesale Franchise or Local Currency options are provisioned, then there are additional views to support planning Gross Margin specifically catered to those options:

W/F - Gross Margin

Brick & Mortar = 300 Men's C	asuals 🗕						
• • • •	Find	• 🌵	� ₿		🌼 💷 🔂	4 2 4 3	
	2/8/2020	2/15/2020	2/22/2020	2/29/2020	3/7/2020	3/14/2020	3/21/2020
Vp W/F GM R	0.00	0.00	0.00	0.00	0.00	0.00	0.0
Vp W/F GM R %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 9
y W/F GM R	0.00	0.00	0.00	0.00	0.00	0.00	0.0
y W/F GM R %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 9
Wp W/F GM R var Ly %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 9
Vp W/F Net Sales R	151,158.79	237,577.40	280,825.96	323,843.83	233,237.26	169,703.50	169,956.9
y W/F Net Sales R	158,716.73	249,456.27	294,867.26	340,036.02	244,899.12	178,188.68	178,454.7
Vp W/F Markdown R	0.00	0.00	0.00	0.00	0.00	0.00	0.0
y W/F Markdown R	0.00	0.00	0.00	0.00	0.00	0.00	0.0
Nerch Target Notes							

Figure 6–19 W/F - Gross Margin View

Local - Gross Margin

Seed Plan Sales	Markdowns	Invent	ory/Receipts	Gross/Net	Margin		
Local - Gross	Margin						
Contractivities (1992)		< > >l					
Brick & Mortar = 300 M	Aen's Casuals						
	Find.	4	- 4	1		🐝 INS 🖥	₩
	2/8	/2020	2/15/2020	2/22/2020	2/29/2020	3/7/2020	3/14/2020
Wp GM LR	78	5,578.49	118,787.79	140,412.10	161,921.00	116,617.75	84,850.83
Wp GM LR %		50.0 %	50.0 %	50.0 %	50.0 %	50.0 %	50.0 %
Ly GM LR	79	9,357.41	124,727.18	147,432.70	170,017.05	122,448.64	89,093.37
Wp GM LR var Ly %		-4.8 %	-4.8 %	-4.8 %	-4.8 %	-4.8 %	-4.8 %
2		-					
Wp Net GM LR	103	2,160.44	159,485.97	189,901.53	217,410.34	157,623.72	114,896.95
Wp Net GM LR %		67.6 %	67.1 %	67.6 %	67.1 %	67.6 %	67.7 %
Ly Net GM LR	107	,268.46	167,439.27	199,396.61	228,280.86	165,504.91	120,641.80
Wp Net GM LR var Ly	%	-4.8 %	-4.8 %	-4.8 %	-4.8 %	-4.8 %	-4.8 %
÷							
Wp Net Sales LR	15	,158.79	237,577.40	280,825.98	323,843.83	233,237.28	169,703.50
Ly Net Sales LR	158	8,716.73	249,456.27	294,867.26	340,036.02	244,899.12	178,188.68
Wp Sales LR var Ly %		0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
e							
Wp Net Sales LC	75	5,580.30	118,789.61	140,413.87	161,922.83	118,619.50	84,852.68
	<						

Figure 6–20 Local - Gross Margin View

To create the Merch Targets, one approach is to complete the following steps within the views described above:

- Seed the plan using Last Year or Forecast to create a base plan. All percentage measures will be seeded to maintain same percentage as Last Year. For example: Wp Gross Margin%, Wp Shrink C%.
- **2.** Net Sales Cost will be seeded with values to maintain the same last year Gross Margin%.
- **3.** Enter the Wp Sales R that you are projecting. Use Fcst Sales R as a guide.
- **4.** Enter the projected Wp Gross Margin% at month level and click **Calculate** in order to calculate the Wp Gross Margin R and Wp Net Sales C.
- **5.** Plan the required inventory by adjusting Wp Stock to Sales Ratio. Adjust other seeded inventory measures such as Wp Shrink C ands Wp MOS C and plan the Wp Receipts C.

Review and Publish Targets

In the Review Targets step, review the targets you created in the Create Targets step.

The next action that the Merch Target users complete is to review and publish their targets.

Review Targets

In this view, review the targets you created in the previous step. If you need to alter the targets shown in this view, return to the Create Targets step to edit them there.

Note: If you have not published Merch Targets yet, the Tgt measures have no values.

Location Product	< < > >									
Brick & Mortar 500 Women	/s Casuals Traditio	nal =								
	Find	- 🎝	∂ ₿		🔆 xyz 🗄) (12 (12				
	W1 of TY	W2 of TY	W3 of TY	W4 of TY	W5 of TY	W6 of TY	W7 of TY	W8 of TY	W9 of TY	W10 of TY
Wp Sales R	914,025.41	1,114,715.64	1,332,946.50	1,544,794.72	1,139,137.16	970,134.91	948,445.65	874,596.62	875,342.14	1,177,936.86
Ly Sales R	870,500.39	1,061,633.94	1,269,472.86	1,471,233.07	1,084,892.53	923,938.01	903,281.57	832,949.16	833,659.18	1,121,844.63
Wp Sales R var Ly %	5.0 %	5.0 %	5.0 %	5.0 %	5.0 %	5.0 %	5.0 %	5.0 %	5.0 %	5.0 %
Wp Net Sales R	548,456.21	663,299.73	787,380.74	908,647.07	676,939.90	580,132.64	568,647.84	527,389.07	527,630.79	1,048,240.82
Ly Net Sales R	522,339.25	631,714.03	749,886.42	865,378.16	644,704.67	552,507.28	541,569.37	502,275.30	502,505.51	998,324.59
Wp Net Sales R var Ly %	5.0 %	5.0 %	5.0 %	5.0 %	5.0 %	5.0 %	5.0 %	5.0 %	5.0 %	5.0 %
			°			а. — о			x x	
Wp Markdown R	75,776.44	90,477.33	109,174.73	124,994.41	92,833.26	79,209.51	77,306.67	72,132.30	71,068.79	142,412.47
Wp Markdown R %	13.8 %	13.6 %	13.9 %	13.8 %	13.7 %	13.7 %	13.6 %	13.7 %	13.5 %	13.6 %
Ly Markdown R	65,732.68	78,485.05	94,704.21	108,427.08	80,528.71	68,710.72	67,060.09	62,571.55	61,649.01	123,536.47
Ly Markdown R %	12.6 %	12.4 %	12.6 %	12.5 %	12.5 %	12.4 %	12.4 %	12.5 %	12.3 %	12.4 %
2										
Wp BOP R	56,622,971	7,449,840.39	7,849,232.63	8,432,598.67	8,994,953.90	9,540,839.46	9,987,848.01	10,275,063	10,530,284	10,874,541
Ly BOP R	41,298,877	40,032,895	38,572,417	44,569,794	42,536,586	40,964,118	39,666,487	47,830,963	46,982,268	45,837,216
Wp Receipts R	-48,523,49	1,190,016.46	1,531,440.03	1,659,326.43	1,351,640.16	1,133,292.04	956,707.47	874,725.32	962,942.54	1,263,356.62
Wp Receipts MU %	0.0 %	0.0 %	50.0 %	0.0 %	0.0 %	0.0 %	50.0 %	0.0 %	0.0 %	0.0 %
Ly Receipts R	0.00	0.00	3,932,315.06	0.00	0.00	0.00	4,574,750.24	0.00	0.00	0.00

Figure 6–21 Review Targets View

If you are satisfied with the target plan you have created, proceed to the next Merch Target role step: Publish Targets.

Publish Targets

Publishing a target copies your Merch Target Wp measure information to the Tgt measures in your task, and then it commits those target measures to the database so that Merch Plan users can retrieve those targets.

The Tgt measures are shown in the Review Targets view found in the Review and Publish Targets step. These measures initially have zero values. After the targets are published in this step, these measures are populated with the target information.

Figure 6–22 Publish Targets

4 1. Publish		
Location Product	< > >	
Brick & Mortar = 500 Women	n's Casuals Traditi	onal
	Find	- 4
	H1 TY	H2 TY
Wp Publish Targets		
Wp Publish Notes		
Tgt Publish Info	adm : 05 Feb 2020 :	laura : 05 Feb 2020 :

To publish the targets, complete the following steps.

- 1. Select the halves in the Wp Publish Targets measure that you want to publish.
- **2.** If needed, enter relevant information in the Wp Publish Notes measure. This is optional.
- **3.** Repeat steps 1 and 2 for other locations and products if necessary.
- 4. Click **Publish Targets**. This button is located in the top right corner.
- 5. A success message is displayed. Click OK to close it.

Figure 6–23 Success Message - Publish Targets

Custom Menu Response	8
Merch Target published successfully!	
	ОК

6. The view refreshes the data in the Wp Publish Targets and the Wp Publish Notes measures. It populates the data for Tgt Publish Notes measure as name:date:notes.

Location Product	< < > >									
Brick & Mortar = 500 Women	s Casuals Traditio	nal								
	Find	- 4	∂ ₿ ?		🔆 872 🖁	• • • ₽ • • • •				
Measure [Label]	W1 of TY	W2 of TY	W3 of TY	W4 of TY	W5 of TY	W6 of TY	W7 of TY	W8 of TY	W9 of TY	W10 of TY
Tgt Sales R	914,025.41	1,114,715.64	1,332,946.50	1,544,794.72	1,139,137.16	970,134.91	948,445.65	874,596.62	875,342.14	1,177,936.86
Tgt Sales Reg+Promo R	741,484.24	900,084.80	1,077,996.59	1,243,333.35	920,469.43	786,156.36	768,801.80	709,155.91	710,057.96	949,629.37
Tgt Sales Clr R	172,541.17	214,630.84	254,949.91	301,461.37	218,667.73	183,978.55	179,643.85	165,440.71	165,284.18	228,307.50
Tgt Net Sales R	548,456.21	663,299.73	787,380.74	908,647.07	676,939.90	580,132.64	568,647.84	527,389.07	527,630.79	1,048,240.82
Tgt Net Sales Reg+Promo R	437,198.99	528,321.30	630,655.26	725,792.54	540,630.39	463,546.23	454,218.62	419,892.19	420,414.48	836,486.20
Tgt Net Sales Clr R	111,257.22	134,978.43	156,725.48	182,854.53	136,309.51	116,586.41	114,429.22	107,496.88	107,216.31	211,754.62
Tgt Markdown R %	13.8 %	13.6 %	13.9 %	13.8 %	13.7 %	13.7 %	13.6 %	13.7 %	13.5 %	13.6 %
Tgt Markdown R	75,776.44	90,477.33	109,174.73	124,994.41	92,833.26	79,209.51	77,306.67	72,132.30	71,068.79	142,412.47
Tgt Markdown Reg+Promo R	60,359.28	72,106.58	87,454.21	99,905.34	74,129.25	63,306.62	61,721.48	57,449.41	56,614.62	113,697.65
Tgt Markdown Clr R	15,417.16	18,370.75	21,720.52	25,089.07	18,704.00	15,902.89	15,585.19	14,682.89	14,454.17	28,714.82
Tgt GM R	2,162,524.36	2,247,466.12	2,299,543.32	2,195,493.02	1,399,141.81	1,059,409.17	966,724.46	819,044.88	743,107.68	1,313,224.34
Tgt GM R %	394.3 %	338.8 %	292.0 %	241.6 %	206.7 %	182.6 %	170.0 %	155.3 %	140.8 %	125.3 %
Tgt BOP R	56,622,971	7,449,840.39	7,849,232.63	8,432,598.67	8,994,953.90	9,540,839.46	9,987,848.01	10,275,063	10,530,284	10,874,541
Tgt Receipts R	-48,523,49	1,190,016.46	1,531,440.03	1,659,326.43	1,351,640.16	1,133,292.04	956,707.47	874,725.32	962,942.54	1,263,356.62
Tgt Receipts MU %	0.0 %	0.0 %	50.0 %	0.0 %	0.0 %	0.0 %	50.0 %	0.0 %	0.0 %	0.0 %
Tgt Shrink R	3,592.90	5,661.24	8,368.71	11,575.33	5,719.29	4,369.02	2.871.29	2,738.96	2,703.21	16,939.70

Figure 6–24 Published Targets

Next Steps

After you have published your targets and committed your task, the Merch Plan user can use the targets to create a plan. To learn about the Merch Targets user's role, see Chapter 7.

If you need to revise your targets at any time during the pre-season, you can follow the same procedures described in this chapter. Since you have already created a working plan, there is no need to seed the task again, unless you want to start again with Ly (Last Year) or Fcst (Forecast) data.

7

Create Merch Plan Task

The Merch Plan role is usually associated with the merchandise planner in the merchandise planning organization. During the pre-season, the Merch Plan user receives department targets from the Merch Targets user. The Merch Plan user references those targets when creating the department and subclass targets.

When Merch Plan users open MFP in the RPAS Fusion Client, they are presented with the preseason activity called Create Merch Plan. This plan belongs only to the Merch Plan user. It includes the following steps:

- Create Plan
- Review and Reconcile
- Review and Submit Plan
- In-Season Review and Re-Project Plan
- In-Season Submit Plan

After Merch Plan users develop the department plan, they submit their plan to the Merch Targets user for approval using the Review and Submit task. This task has two steps:

- Review Plan
- Submit and Copy Approved Plan

These tasks and steps are shown in Figure 7–1.

Figure 7–1 Create Merch Plan View: Pre-Season Tasks and Steps

🕼 Create Merch Plan	
🖹 Create Merch Plan	
Task or Step	Action
🔺 📋 Create Merch Plan	🕒 🕒 💋
Create Plan	🕒 🖸
Review and Reconcile	🔮 🖪 💋
Review and Submit Plan	🕒 🛛 🖆
In Season Review and Re-project Plan	🔮 🖪 💋
In Season Submit Plan	🕒 🛛 🖉

The Merch Plan user must complete the first three steps in the Create Merch Plan task in order to create the department plans and submit them for approval to the Merch Targets user. To do this, the Merch Plan user must first build the workbook.

Building the Workbook

To build the bottom up role workbook, complete the following steps.

1. Click the Create New Workbook icon in the Create Merch Plan task.

Figure 7–2 Create New Workbook Icon

📮 Create Merch Plan	
📓 Create Merch Plan	
Task or Step	Action
🔺 📋 Create Merch Plan	🕒 🕒 🙆
Create Plan	🖻 🛛 🖻
Review and Reconcile	P 🛛
Review and Submit Plan	🕒 🛛 🚰
In Season Review and Re-project Plan	🔮 🛛 💋
In Season Submit Plan	🕒 🕒 🚰

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

								0				
				Select	Calendar	Select PoC	Sele	d Product				
Select Cale	endar						Selected (Calendar				
Available	Items						Selected	Items				
View +	Dimension	Find.	4		Detach		View +	Dimension	Find.	4		30
Label							Label					
Ht	JLY						✓H1	TY				
H2 3	3LY						√H2	TY				
HIL	LLY					999 4						
H21	LUY					🔉 Add All						
HIL	or .					& Bemove						
H2 L	LY											
~H11	TY					C Remove All						
✓H21	ΓY											
HIT	NY											
H21	NY											

Figure 7–3 Workbook Wizard: Calendar Selection

3. The Location Selection step of the workbook wizard is displayed. Select the channels you want to plan and move them to the Selected Items box. Click **Next**.

				0)			_	-0					
			Sel	ect Ca	alendar		Select PoC	Sel	lect Product					
Select Cha	annel							Selected	Channel					
Available	Items							Selected	Items					
View *	Dimension	Find	4	û	🛃 Detach	ı		View *	Dimension	Find	₽ ∂	B	14	,
Label	Label							Label						•
BR/	BRA Brick & Mortar					~		🗸 Bri	ick & Mortar					
BR	A Direct						<mark>≫ A</mark> dd							
BR	A Wholesale/Fra	nchise					🔉 Add A <u>l</u> l							
🗸 Brid	:k & Mortar						Remove							
CA	Brick & Mortar													
CA	Direct						Kemove All							
CN	Brick & Mortar													
CN	Direct					~								

Figure 7–4 Workbook Wizard: Location Selection

4. The Product Selection step of the workbook wizard is displayed. Select the company you want to plan and move it to the Selected Items box. Click **Finish**.

Figure 7–5 Workbook Wizard: Product Selection

				0	·	0	_							
			Se	lect Ca	alendar	Select PoC	Sele	ct Product						
Select Pro	oduct						Selected F	Product						
Available	Items						Selected I	tems						
View *	Dimension	Find	₽	Û	🛃 Detach		View *	Dimension	Find	₽	û	ė	\$	>>
Label					• •		Label						-	
100	100 Men's Footwear					✓ 500	Women's Casu	als Traditio	onal					
200	200 Women's Footwear					> <u>A</u> dd								
300	Men's Casuals					Md All ≪								
400	Mens Tops					<u> <u> </u> </u>								
✓ 500	Women's Casu	als Traditional												
505	Women's Casu	als Fast Fashion	i.			Remove All								
600	Women's Class	sics												

The Merch Plan role workbook is built, and the Initialize view opens.

Create Plan

This section provides details about plan creation.

Seed Plan

The first action that the Merch Plan users complete when creating new plans is to seed the plan with the Initialize view. This view is found under the first tab within the Create Plan Step, Seed Plan.

Loca	tion	Product	< < > >				
Brick & Mor	tar = 5	i00 Women'	s Casuals Traditiona	- 1			
			Find	•	J (8	
			H1 TY			H2 TY	
Wp Seed S	ource		Last Year		Last \	'ear	~

Figure 7–6 Create Plan - Seed Plan: Initialize Plan View

Measure	Description
Seed Source	The seed source used to seed the working plan. Use this option to seed or not seed the working plan. You can seed with Last Year's (Ly) or Forecast (Fcst) data. Or, you can choose the Blank option if you do not want to seed the working plan.
Seed Info	Includes a few pertinent facts about the last time that the Seed custom menu was executed: last seed source concatenated with last seeded date and the last user to seed.
	If blank, then the given intersection has never been seeded.

With this view, you can choose to seed your plan with Last Year (Ly) or Forecast (Fcst) data to create a demand curve on which to spread the new plan's initial targets. Or, you can instead choose to not seed the plan, which allows you to create a plan that is not influenced by last year's performance or forecast (plus last year's performance).

In the preceding example, both Half1 and Half2 have been selected to be seeded for the Brick & Mortar channel for the 500 Women's Casuals Traditional department.

Seeding the Plan

When seeding the plan, you can choose which information is seeded. For instance, you can seed just one half or all halves in the task, as shown in Figure 7–6. You can also choose what locations and products to seed.

There are two ways you can seed. You can seed each level individually or you can seed several levels at once by changing the dimension level shown in the view.

Seeding One Level at a Time As shown in Figure 7–6, only the Brick & Mortar channel and the 20 Menswear division have been selected to be seeded with Ly data. This means that the other product divisions have not been selected to be seeded yet. To seed the next division in the Product dimension within the Brick & Mortar channel, complete the following steps:

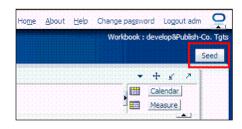
- 1. Click within the dimension field that you want to change, as shown in Figure 7–7.
- 2. Click the Next or Previous arrow, as shown in Figure 7–7.

Figure 7–7 Changing a Dimension Level with Page Arrows



- **3.** The page refreshes and the next division in the Product dimension is displayed in the page edge. Note that the Seed Source measure is no longer populated.
- 4. Select the half that you want to seed with Ly or Adj Ly data.
- 5. Click the Next arrow to view and seed the next division.
- **6.** When you have selected all the data you want to seed, click **Seed** in the top right corner.

Figure 7–8 Seed Button



7. A confirmation message is displayed, stating that the data has been successfully seeded. Click **OK**.

Figure 7–9 Seeding Success Message

Custom Menu Response	0
Seeding completed successfully!	
	ОК

After you have seeded, the view refreshes and the Last Seed Source and Last Seed Date measures contain the source and date of the last seed.

Seeding Several Levels at Once If you want to seed several locations and several products at once, you may want to change the level of the dimensions shown in the page edge.

The default setting of the Initialize Plan view is set to show the Calendar dimension at the half level, the Location dimension at the channel level, and the Product dimension at the division level.

To change the dimension level shown in the page edge or grid, complete the following steps:

1. Click the dimension tile of the dimension level you want to change.

Figure 7–10 Location Dimension Tile

41	nitialize		
	Location	Product	< < > >
Bric	k & Mortar 📕	500 Women's (Casuals Traditional

2. The dimension window is displayed. Select the level of the dimension that you want to appear in the page edge. If you want to view more than one level at a time in the page edge or grid, select multiple levels. In Figure 7–11, Channel was deselected and all [Location] was selected instead.

Figure 7–11 Location Dimension Window

Initialize -	Location
Levels	Show Attributes and Sort Show and Hide
Display 🍙	Block View Outline View
Select 💌	Levels
	A Channel
+ -	🖌 🖵 Chain
+ -	🔺 🖵 Company
+ -	Lecation]
+ -	🔺 🖵 Chain Group
• =	└_ 📝 all [Location]
+ -	Currency
+ -	└── all [Location]

- 3. Click OK when finished.
- 4. Repeat steps 1 through 3 for other dimensions if desired.
- **5.** After the dimensions are at the level you want, select the halves that you want to seed.

In Figure 7–12, both the Location and Product dimensions are at All, and the halves Half1 FY2020 and Half2 FY2020 to H1TY and H2TY have been set to seed from last year.

6. When you have selected all the data you want to seed, click **Seed** in the top right corner, as shown in Figure 7–12.

Initialize Location Product K < > >all [Location] all [Product] Find... 🗗 🕄 H1 TY H2 TY Wp Seed Source Last Year Last Year V Wp Seed Info Ly : 05 Feb 2020 : adm Ly : 05 Feb 2020 : adm

Figure 7–12 Seeding Several Levels at Once

7. The view refreshes and the Last Seeded Source and Last Seed Date measures contain the source and date of the last seed. A confirmation message is displayed, stating that the data has been successfully seeded. Click **OK**.

Figure 7–13 Seeding Success Message

Custom Menu Response	0
Seeding completed successfully!	
	OK

After you have seeded the divisions, continue to the next tab: Sales and Markdowns.

Sales/Markdowns

After you have seeded, develop the sales and markdown plan for those departments. The second tab within the Create Plan step, Sales and Markdowns, has one default view: Sales and Markdowns.

Location Product	K < > >									
Brick & Mortar 🗧 30018 Sho	rt Sleeve Tees									
	Find	- 🕹	∂ ₿		🔆 xyz 🖻	₩ 2 \ }				
	2/8/2020	2/15/2020	2/22/2020	2/29/2020	3/7/2020	3/14/2020	3/21/2020	3/28/2020	4/4/2020	4/11/2020
Wp Sales R	57,723.30	115,452.64	115,412.93	115,416.66	115,405.21	115,521.05	118,119.03	59,951.29	60,037.78	120,015.49
Fost Sales R	71,710.99	71,710.99	71,710.99	71,710.99	71,710.99	71,710.99	71,710.99	71,710.99	71,710.99	71,710.99
Wp Sales R var Fcst %	-19.5 %	61.0 %	60.9 %	60.9 %	60.9 %	61.1 %	64.7 %	-16.4 %	-16.3 %	67.4 %
Ly Sales R	57,723.30	115,452.64	115,412.93	115,416.66	115,405.21	115,521.05	118,119.03	59,951.29	60,037.78	120,015.49
Wp Sales R var Ly %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
15.										
Wp Net Sales R	34,932.78	67,513.15	67,366.58	67,394.74	67,427.30	67,415.40	68,962.55	36,154.96	36,153.93	106,340.89
Ly Net Sales R	34,932.78	67,513.15	67,366.58	67,394.74	67,427.30	67,415.40	68,962.55	36,154.96	36,153.93	106,340.89
Wp Net Sales R var Ly %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
.6										
Wp Net Sales C	17,466.87	33,757.09	33,683.88	33,698.02	33,714.24	33,708.29	34,481.82	18,078.10	18,077.48	53,171.08
Ly Net Sales C	17,466.87	33,757.09	33,683.88	33,698.02	33,714.24	33,708.29	34,481.82	18,078.10	18,077.48	53,171.08
WpNet Sales CvarLy%	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
1										
Wp Returns R %	39.5 %	41.5 %	41.6 %	41.6 %	41.6 %	41.6 %	41.6 %	39.7 %	39.8 %	11.4 %
Wp Returns R	22,790.52	47,939.49	48,046.35	48,021.92	47,977.91	48,105.65	49,156.48	23,796.33	23,883.85	13,674.60
Ly Returns R %	39.5 %	41.5 %	41.6 %	41.6 %	41.6 %	41.6 %	41.6 %	39.7 %	39.8 %	11.4 %
Ly Returns R	22,790.52	47,939.49	48,046.35	48,021.92	47,977.91	48,105.65	49,156.48	23,796.33	23,883.85	13,674.60

Figure 7–14 Sales and Markdowns View

If the Wholesale Franchise or Local Currency options are provisioned, then there are additional views to support planning sales and markdowns specifically catered to those options:

• W/F - Sales and Markdowns

Location Product	< > >						
Brick & Mortar = 30010 Denin	1-						
• • • •	Find	• 🍕	6		🌼 🚾 🖥) 4 9 4	
	2/8/2020	2/15/2020	2/22/2020	2/29/2020	3/7/2020	3/14/2020	
Wp W/F Sales R	86,374.43	129,575.83	129,632.84	172,719.87	84,778.84	42,412.7	
Ly W/F Sales R	90,693.15	138,054.62	136,114.48	181,355.88	89,017.78	44,533.4	
Wp W/F Sales R var Ly %	-4.8 %	-4.8 %	-4.8 %	-4.8 %	-4.8 %	-4.8 9	
Wp W/F Net Sales R	86,374.43	129.575.83	129,632,84	172.719.87	84,778,84	42.412.7	
Wp W/F Net Sales R %	100.0 %	100.0 %	100.0 %	100.0 %	100.0 %	100.0 9	
Ly W/F Net Sales R	90,693.15	136,054.62	136,114.48	181,355.88	89,017.78	44,533.4	
Ly W/F Net Sales R %	100.0 %	100.0 %	100.0 %	100.0 %	100.0 %	100.0 9	
Wp W/F Net Sales R var Ly %	-4.8 %	-4.8 %	-4.8 %	-4.8 %	-4.8 %	-4.8 9	
÷							
Wp W/F Markup R %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 9	
Wp W/F Markup R	0.00	0.00	0.00	0.00	0.00	0.0	
Ly W/F Markup R %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0	
Ly W/F Markup R	0.00	0.00	0.00	0.00	0.00	0.0	
Wp W/F Markup R var Ly %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 9	

Figure 7–15 W/F - Sales and Markdowns View

Local - Sales and Markdowns

Local - Sales and M	larkdowns						
Location Product Brick & Mortar = 30010 Denim	к<>> -						
	Find	• 🍕	1		🐝 🚾 🖥	00 00	
Measure [Label]	2/8/2020	2/15/2020	2/22/2020	2/29/2020	3/7/2020	3/14/2020	3/21/2020
Wp Sales LR	161,952.03	242,954.68	243,061.58	323,849.69	161,850.56	80,969.82	81,120.62
Ly Sales LR	161,952.03	242,954.68	243,061.58	323,849.69	161,850.56	80,969.82	81,120.62
Wp Sales LR var Ly %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
1	1		14 1				
Wp Net Sales LR	86,374.43	129,575.83	129,632.84	172,719.87	84,778.84	42,412.78	42,491.76
Ly Net Sales LR	90,693.15	136,054.62	136,114.48	181,355.86	89,017.78	44,533.42	44,616.3
Wp Net Sales LR var Ly %	-4.8 %	-4.8 %	-4.8 %	-4.8 %	-4.8 %	-4.8 %	-4.8 %
1							
Wp Net Sales LC	43,187.50	64,788.22	64,816.71	86,360.26	42,389.71	21,206.71	21,246.2
Ly Net Sales LC	45,346.88	68,027.63	68,057.55	90,678.27	44,509.20	22,267.05	22,308.5
Wp Net Sales LC var Ly %	-4.8 %	-4.8 %	-4.8 %	-4.8 %	-4.8 %	-4.8 %	-4.8 %
4		i i	j.				
Wp Markdown LR %	12.7 %	12.6 %	12.5 %	12.9 %	12.5 %	12.4 %	12.7 %
Wp Markdown LR	10,976.52	16,363.48	16,242.60	22,215.19	10,593.18	5,268.45	5,407.7
Ly Markdown LR	11,525.35	17,181.65	17,054.73	23,325.95	11,122.84	5,531.87	5,678.0

Figure 7–16 Local - Sales and Markdowns View

Inventory/Receipts

The third tab within the Create Plan step, Receipts and Inventory, has one view: Receipts and Inventory.

Location Product										
Brick & Mortar 🗧 30018 Sho	oft Sleeve Tees									
	Find	- 4	∂ ₽		💥 XYZ 🕻	<u>}</u>				
	2/8/2020	2/15/2020	2/22/2020	2/29/2020	3/7/2020	3/14/2020	3/21/2020	3/28/2020	4/4/2020	4/11/2020
Wp BOP C	2,407,949.58	2,390,085.28	2,353,853.80	2,532,484.91	2,496,790.26	2,460,656.79	2,424,371.28	2,674,628.96	2,656,108.72	2,637,687.3
Ly BOP C	1,905,114.45	1,865,288.66	1,788,887.21	2,132,742.76	2,052,544.19	1,971,976.60	1,892,565.32	2,397,640.96	2,369,617.09	2,329,356.9
•				a) a			·		¢	
Wp Net Sales C	17,466.87	33,757.09	33,683.88	33,698.02	33,714.24	33,708.29	34,481.82	18,078.10	18,077.48	53,171.0
Ly Net Sales C	17,466.87	33,757.09	33,683.88	33,698.02	33,714.24	33,708.29	34,481.82	18,078.10	18,077.48	53,171.0
Wp Net Sales C var Ly %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
				in a			2		0	
Wp Receipts C	0.00	0.00	214,723.57	0.00	0.00	0.00	287,188.14	0.00	0.00	0.0
Ly Receipts C	0.00	0.00	214,723.57	0.00	0.00	0.00	287,188.14	0.00	0.00	0.0
Wp Receipts C var Ly %	-100.0 %	-100.0 %	0.0 %	-100.0 %	-100.0 %	-100.0 %	0.0 %	-100.0 %	-100.0 %	-100.0 9
				u a					oo	
Wp Shrink C	44.48	395.26	406.93	366.20	485.71	499.20	436.92	0.00	33.55	1,168.8
Ly Shrink C	44.48	395.26	406.93	366.20	485.71	499.20	436.92	0.00	33.55	1,168.8
Wp Move to Cir C	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0
Ly Move to Cir C	-16,547.28	-33,212.61	178,941.21	-33,130.93	-33,239.89	-32,565.47	259,734.70	-8,310.06	-16,567.99	-52,931.0
Wp MOS C	0.00	460.05	482.00	317.23	348.71	432.43	468.79	0.00	0.00	991.3
Ly MOS C	0.00	357.42	360.43	284.72	302.95	363.07	380.03	0.00	0.00	1,004.1

Figure 7–17 Receipts and Inventory View

Gross/Net Margin

After you have seeded, develop the sales and markdown plan for those departments. The last tab within the Create Plan step, Gross Margin, has one default view: Gross Margin.

Location Product	< < > >									
Brick & Mortar a 30018 Sho	rt Sleeve Tees									
	Find	- 4	健 ₽		🐝 xyz 🔒	42 √3				
	W1 of TY	W2 of TY	W3 of TY	W4 of TY	W5 of TY	W6 of TY	W7 of TY	W8 of TY	W9 of TY	W10 of TY
Wp GM R	15,017.13	27,642.21	27,584.63	27,609.32	27,345.88	27,694.41	28,421.50	15,442.30	15,436.67	42,578.62
Wp GM R %	43.0 %	40.9 %	40.9 %	41.0 %	40.6 %	41.1 %	41.2 %	42.7 %	42.7 %	40.0 %
Ly GM R	15,017.13	27,642.20	27,584.63	27,609.32	27,345.88	27,694.40	28,421.50	15,442.30	15,436.67	42,578.6
Ly GM R %	43.0 %	40.9 %	40.9 %	41.0 %	40.6 %	41.1 %	41.2 %	42.7 %	42.7 %	40.0 %
Wp GM R var Ly %	0.0 %	0.0 %	-0.0 %	0.0 %	0.0 %	0.0 %	-0.0 %	0.0 %	0.0 %	0.0 %
Wp Vendor Funds R	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0
Ly Vendor Funds R	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0
Wp Royalties R	2,049.47	4,002.70	4,055.35	4,111.76	4,099.53	4,083.00	4,370.63	2,083.07	2,088.64	4,198.8
Ly Royalties R	2,049.47	4,002.70	4,055.35	4,111.76	4,099.53	4,083.00	4,370.63	2,083.07	2,088.64	4,198.88
5										
Wp Net GM R	17,066.60	30,705.11	30,655.89	31,073.79	30,734.28	30,896.11	31,837.29	17,525.37	17,525.31	44,760.78
Wp Net GM R %	48.9 %	45.5 %	45.5 %	46.1 %	45.6 %	45.8 %	46.2 %	48.5 %	48.5 %	42.1 %
Ly Net GM R	17,066.60	30,930.13	30,919.20	31,151.72	30,839.56	31,051.35	32,032.19	17,525.37	17,525.31	44,769.43
Ly Net GM R %	48.9 %	45.8 %	45.9 %	46.2 %	45.7 %	46.1 %	46.4 %	48.5 %	48.5 %	42.1 9
Wp Net GM R var Ly %	0.0 %	-0.7 %	-0.9 %	-0.3 %	-0.3 %	-0.5 %	-0.6 %	0.0 %	0.0 %	-0.0 %

Figure 7–18 Gross Margin View

If Wholesale Franchise or Local Currency options are provisioned, then there are additional views to support planning Gross Margin specifically catered to those options:

• W/F - Gross Margin

Wp W/F GM R % 0.0 %		Find	- 4		IC 🛛	ša xvz
WP W/F GM R % 0.0 %		2/8/2020	2/15/2020	2/22/2020	2/29/2020	3/7/2020
Ly W/F GM R 0.0 %	Wp W/F GM R	0.00	0.00	0.00	0.00	0.00
Ly W/F GM R % 0.0 %	Wp W/F GM R %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Wp W/F GM R var Ly % -100.0 %<	Ly W/F GM R	0.00	0.00	0.00	0.00	0.00
Wp W/F Net Sales R 86,374.43 129,575.83 129,632.84 172,719.87 84,778.8 Ly W/F Net Sales R 90,693.15 136,054.62 136,114.48 181,355.86 89,017.7 Wp W/F Markdown R 0.00 0.00 0.00 0.00 0.00 0.00 Ly W/F Markdown R 0.00 0.00 0.00 0.00 0.00 0.00	Ly W/F GM R %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Ly W/F Net Sales R 90,693.15 136,054.62 136,114.48 181,355.86 89,017.7 W/ W/F Markdown R 0.00	Wp W/F GM R var Ly %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
Ly W/F Net Sales R 90,693.15 136,054.62 136,114.48 181,355.86 89,017.7 Wp W/F Markdown R 0.00	4:					
Wp W/F Markdown R 0.00 <td>Wp W/F Net Sales R</td> <td>86,374.43</td> <td>129,575.83</td> <td>129,632.84</td> <td>172,719.87</td> <td>84,778.84</td>	Wp W/F Net Sales R	86,374.43	129,575.83	129,632.84	172,719.87	84,778.84
Ly W/F Markdown R 0.00 0.00 0.00 0.00 0.00	Ly W/F Net Sales R	90,693.15	136,054.62	136,114.48	181,355.86	89,017.78
	Wp W/F Markdown R	0.00	0.00	0.00	0.00	0.00
March Dias Natas	Ly W/F Markdown R	0.00	0.00	0.00	0.00	0.00
weren Harrivotes	Merch Plan Notes					

Figure 7–19 W/F - Gross Margin View

Local - Gross Margin

Seed Plan Sales/Marko	iowns Invent	ory/Receipts	Gross/Net I	Margin			
🖌 Local - Gross Marg	jin						
Location Product Brick & Mortar = 30010 Denir	K < > > ∎-						
	Find	- 4		EQ 🔒	🌼 xvz 🔂	49 49	
	2/8/2020	2/15/2020	2/22/2020	2/29/2020	3/7/2020	3/14/2020	3/21/2020
Wp GM LR	43,186.92	64,787.61	64,816.12	88,359.61	42,389.12	21,206.07	21,245.5
Wp GM LR %	50.0 %	50.0 %	50.0 %	50.0 %	50.0 %	50.0 %	50.0 %
Ly GM LR	45,346.27	68,026.99	68,056.93	90,677.59	44,508.58	22,266.37	22,307.8
Wp GM LR var Ly %	-4.8 %	-4.8 %	-4.8 %	-4.8 %	-4.8 %	-4.8 %	-4.8 9
2							
Wp Net GM LR	58,250.79	86,447.11	87,711.97	116,149.26	57,753.84	28,741.22	29,018.4
Wp Net GM LR %	67.4 %	68.7 %	67.7 %	67.2 %	68.1 %	67.8 %	68.3 9
Ly Net GM LR	61,163.33	90,769.47	92,097.57	121,956.72	60,641.53	30,178.28	30,469.3
Wp Net GM LR var Ly %	-4.8 %	-4.8 %	-4.8 %	-4.8 %	-4.8 %	-4.8 %	-4.8 9
*							
Wp Net Sales LR	86,374.43	129,575.83	129,632.84	172,719.87	84,778.84	42,412.78	42,491.7
Ly Net Sales LR	90,693.15	138,054.62	136,114.48	181,355.86	89,017.78	44,533.42	44,616.3
Wp Net Sales LR var Ly %	-4.8 %	-4.8 %	-4.8 %	-4.8 %	-4.8 %	-4.8 %	-4.8 9
12							
Wp Net Sales LC	43,187.50	64,788.22	64,816.71	86,360.26	42,389.71	21,206.71	21,246.2
	<						

Figure 7–20 Local - Gross Margin View

Sales and Markdown Plan - Sales by Type

After you have seeded the groups and reviewed the Merch Target plan, you can develop the sales and markdown plan for the subclasses within those departments using the Sales and Markdowns view.

Use the following best practices to plan the sales and markdowns.

- **1.** Using the default measure profile, which is Sales and Markdowns, review and compare the total sales to the forecast.
- 2. Change the measure profile to Sales by Type.

Location Product	K < > X									
Brick & Mortar = 30018 Short	Sleeve Tees									
	Find	- 4			🏂 XVZ 🔒	42 43				
	W1 of TY	W2 of TY	W3 of TY	W4 of TY	W5 of TY	W6 of TY	W7 of TY	W8 of TY	W9 of TY	W10 of TY
Wp Sales R	57,723.30	115,452.64	115,412.93	115,416.66	115,405.21	115,521.05	118,119.03	59,951.29	60,037.78	120,015.4
Ly Sales R	57,723.30	115,452.64	115,412.93	115,416.66	115,405.21	115,521.05	118,119.03	59,951.29	60,037.78	120,015.49
Wp Sales R var Ly %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Wp Sales Reg+Promo R	47,372.57	93,443.19	93,124.92	93,252.64	92,663.48	93,172.55	94,686.87	48,701.68	48,851.12	96,259.80
Ly Sales Reg+Promo R	47,372.57	93,443.19	93,124.92	93,252.64	92,663.48	93,172.55	94,686.87	48,701.68	48,851.12	96,259.80
Wp Sales Reg+Promo R var Ly %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Wp Sales Clr R	10,350.73	22,009.45	22,288.01	22,164.02	22,741.73	22,348.50	23,432.16	11,249.61	11,186.66	23,755.69
Ly Sales Clr R	10,350.73	22,009.45	22,288.01	22,164.02	22,741.73	22,348.50	23,432.16	11,249.61	11,186.66	23,755.69
Wp Sales Cir R var Ly %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Wp Net Sales R	34,932.78	67,513.15	67,366.58	67,394.74	67,427.30	67,415.40	68,962.55	36,154.96	36,153.93	106,340.8
Ly Net Sales R	34,932.78	67,513.15	67,366.58	67,394.74	67,427.30	67,415.40	68,962.55	36,154.96	36,153.93	106,340.8
Wp Net Sales R var Ly %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Wp Net Sales Reg+Promo R	28,196.46	54,197.01	54,012.46	54,086.53	53,744.78	54,040.06	54,918.36	28,967.43	29,053.35	84,679.13
Ly Net Sales Reg+Promo R	28,196.46	54,197.01	54,012.46	54,086.53	53,744.78	54,040.06	54,918.36	28,967.43	29,053.35	84,679.1
Wp Net Sales Reg+Promo R var Ly %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Wp Net Sales Clr R	6,736.32	13,316.14	13,354.12	13,308.21	13,682.52	13,375.34	14,044.19	7,187.53	7,100.58	21,661.7
Ly Net Sales Clr R	6,736.32	13,316.14	13,354.12	13,308.21	13.682.52	13,375.34	14,044.19	7,187.53	7,100.58	21,661.70

Figure 7–21 Sales and Markdowns View, Sales By Type Measure Profile

3. In the Sales by Type measure profile, plan your sales by type. The sales types are Total Sales, Regular + Promo Sales, and Clearance Sales.

Note: Since sales and markdowns are both planned at the type level, you must first complete the sales by type planning before you can plan the markdowns by type.

Start by planning the regular sales. Then, using your marketing calendar as a guide, align the promotional sales to the calendar. Refer to the calendar again for the exit weeks for the products and plan the clearance sales for those weeks.

The planned figures for these sales types populates the Wp Sales R measure.

4. Return to the Sales and Markdowns measure profile.

Location Product Brick & Mortar = 30018 Short	Sleeve Tees									
	Find	- 4	∲ ₿		🌞 XVZ 🔒	42 43				
	W1 of TY	W2 of TY	W3 of TY	W4 of TY	W5 of TY	W6 of TY	W7 of TY	W8 of TY	W9 of TY	W10 of TY
Wp Sales R	57,723.30	115,452.64	115,412.93	115,416.66	115,405.21	115,521.05	118,119.03	59,951.29	60,037.78	120,015.49
Ly Sales R	57,723.30	115,452.64	115,412.93	115,416.66	115,405.21	115,521.05	118,119.03	59,951.29	60,037.78	120,015.49
Wp Sales R var Ly %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Wp Sales Reg+Promo R	47,372.57	93,443.19	93,124.92	93,252.64	92,663.48	93,172.55	94,686.87	48,701.68	48,851.12	96,259.80
Ly Sales Reg+Promo R	47,372.57	93,443.19	93,124.92	93,252.64	92,663.48	93,172.55	94,686.87	48,701.68	48,851.12	96,259.80
Wp Sales Reg+Promo R var Ly %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Wp Sales Clr R	10,350.73	22,009.45	22,288.01	22,164.02	22,741.73	22,348.50	23,432.16	11,249.61	11,186.66	23,755.69
Ly Sales Clr R	10,350.73	22,009.45	22,288.01	22,164.02	22,741.73	22,348.50	23,432.16	11,249.61	11,186.66	23,755.69
Wp Sales Clr R var Ly %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Wp Net Sales R	34,932.78	67,513.15	67,366.58	67,394.74	67,427.30	67,415.40	68,962.55	36,154.96	36,153.93	106,340.8
Ly Net Sales R	34,932.78	67,513.15	67,366.58	67,394.74	67,427.30	67,415.40	68,962.55	36,154.96	36,153.93	106,340.89
Wp Net Sales R var Ly %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Wp Net Sales Reg+Promo R	28,196.46	54,197.01	54,012.46	54,086.53	53,744.78	54,040.06	54,918.36	28,967.43	29,053.35	84,679.13
Ly Net Sales Reg+Promo R	28,196.46	54,197.01	54,012.46	54,086.53	53,744.78	54,040.06	54,918.36	28,967.43	29,053.35	84,679.13
Wp Net Sales Reg+Promo R var Ly %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Wp Net Sales Clr R	6,736.32	13,316.14	13,354.12	13,308.21	13,682.52	13,375.34	14,044.19	7,187.53	7,100.58	21,661.76

Figure 7–22 Sales and Markdowns View

- **5.** With the total Wp Sales R populated, you can adjust the total to your plan while still maintaining the relationships between the different sales types.
- 6. Plan the shrink with either the Wp Shrink R or Wp Shrink R% measure.
- 7. Change the measure profile to Markdown by Type.
- **8.** In the Markdown by Type profile, edit the Wp Markdown Reg+Promo R% to adjust the Wp Markdown Reg+Promo Rate.

Location Product	K<>>									
Brick & Mortar = 30018 Shor	t Sleeve Tees									
	Find	• 4	∂ ₿	D 🕻	xvz 👸	₩ 2 ₩ 2				
	2/8/2020	2/15/2020	2/22/2020	2/29/2020	3/7/2020	3/14/2020	3/21/2020	3/28/2020	4/4/2020	4/11/2020
Wp Net Sales R	34,932.78	67,513.15	67,366.58	67,394.74	67,427.30	67,415.40	68,962.55	36,154.96	36,153.93	106,340.8
Ly Net Sales R	34,932.78	67,513.15	67,366.58	67,394.74	67,427.30	67,415.40	68,962.55	36,154.96	36,153.93	106,340.8
					9					(
Wp Markdown R	4,103.74	8,200.46	8,344.57	8,817.57	8,594.89	7,737.40	8,160.12	4,386.18	4,592.91	13,537.1
Ly Markdown R	4,103.74	8,200.46	8,344.57	8,817.57	8,594.89	7,737.40	8,160.12	4,386.18	4,592.91	13,537.1
Wp Markdown R var Ly %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 9
Wp Markdown R %	11.7 %	12.1 %	12.4 %	13.1 %	12.7 %	11.5 %	11.8 %	12.1 %	12.7 %	12.7 9
Ly Markdown R %	11.7 %	12.1 %	12.4 %	13.1 %	12.7 %	11.5 %	11.8 %	12.1 %	12.7 %	12.7 9
•					10		8			(
Wp Markdown Reg+Promo R	3,317.11	6,598.03	6,689.00	7,081.68	6,867.52	6,179.67	6,483.31	3,524.09	3,690.08	10,771.2
Ly Markdown Reg+Promo R	3,317.11	6,598.03	6,689.00	7,081.68	6,867.52	6,179.67	6,483.31	3,524.09	3,690.08	10,771.2
Wp Markdown Reg+Promo R var Lv %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 9
Wp Markdown Reg+Promo R %	11.8 %	12.2 %	12.4 %	<mark>13</mark> .1 %	12.8 %	11.4 %	11.8 %	12.2 %	12.7 %	12.7 9
2										
Wp Markdown Clr R	786.63	1,602.43	1,655.57	1,735.89	1,727.37	1,557.73	1,676.81	862.09	902.83	2,765.8
Ly Markdown Cir R	786.63	1,602.43	1,655.57	1,735.89	1,727.37	1,557.73	1,676.81	862.09	902.83	2,765.8

Figure 7–23 Sales and Markdowns View, Markdown by Type Measure Profile

9. After you have adjusted the sales and markdown plan, continue to the next step: Inventory and Receipt Plan.

Inventory and Receipt Plan

After you have developed the sales and markdown plan, develop a receipts and inventory plan that can support the sales and markdown plan. The purpose of this step is to ensure that you have a receipt and inventory plan that supports the sales that you are projecting.

Like the Plan Sales and Markdowns View, the Plan Receipts/Inventory view contains several Ly metrics that you can reference when setting your targets. There are also additional measures for adjusting your inventory targets. Note that the adjustments you made to the Wp Sales R measure in the Plan Sales and Markdowns view are visible in this view if you have calculated.

Use the following best practices to plan the receipts and inventory.

- 1. Plan the receipt flow and then evaluate the average inventory and turn.
- **2.** Adjust the Wp Stock to Sales C measure accordingly. These adjustments affect the receipts for both the current month and prior month. However, the total plan period receipts do not increase or decrease; they only shift from month to month.

# 1. Receipts and In	ventory									* *	đ
Location Product		i i								Calendar	
Brick & Mortar = 100000 Gr	ound -								1	Measure	
						-					•
	Find	- 4			<u>i</u>	C 42 43					
	2/8/2020	2/15/2020	2/22/2020	2/29/2020	3/7/2020	3/14/2020	3/21/2020	3/28/2020	4/4/2020	4/11/2020	3
Wp BOP C	1,953,980.68	1,933,580.22	1.870,414.74	1,947,002.91	1,905,646.90	1,865,112.12	1,845,152.76	1,968,806.14	1,926,475.98	1.884,195.75	
Ly BOP C	1,758,427.86	1,709,107.55	1,576,919.48	1,710,715.99	1,614,253.09	1,523,038.26	1,475,803.40	1,735,835.25	1,660,762.78	1,567,304.18	
Wp Net Sales C	20,092.93	59,284.69	59,248.82	39,680.55	38,823.40	19,745.87	20,226.40	40,526.92	40,555.61	21,112.97	8
Ly Net Sales C	20,092.93	59,284.69	59,248.82	39,680.55	38,823.40	19,745.87	20,226.40	40,526.92	40,555.61	21,112.97	
Wp Net Sales C var Ly %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	
								· · · · · ·			
Wp Receipts C	0.00	0.00	139,847.28	0.00	0.00	0.00	144,217.02	0.00	0.00	0.00	
Ly Receipts C	0.00	0.00	139,847.28	0.00	0.00	0.00	144,217.02	0.00	0.00	0.00	
Wp Receipts C var Ly %	-100.0 %	-100.0 %	0.0 %	-100.0 %	-100.0 %	-100.0 %	0.0 %	-100.0 %	-100.0 %	-100.0 %	
				<i>.</i>						9	
Wp Shrink C	121.75	1,203.95	1,258.12	540.13	569.49	67.14	168.17	701.87	\$32.36	161.13	1
Ly Shrink C	121.75	1,203.95	1,258,12	540.13	569.49	67.14	168.17	701.87	532.36	161.13	
Wp Move to Cir C	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	É.
Ly Move to Cir C	-19,946.02	-59,804,14	77,253.07	-39,623.42	-39,111.36	-18,777.69	132,949.29	-32,909.98	-40,064.02	-20,875.37	ŝ.
Wp MOS C	66.15	1,463.96	1,536.12	552.93	617,44	54.18	93.50	521.62	532.21	35.82	ŝ.
Ly MOS C	59.59	1,288.19	1,254.09	495.50	526.91	43.92	73.86	486.33	476.97	30.51	
Wp EOP C	1,933,580.22	1,870,414.74	1,947,002.91	1,905,646.90	1,865,112.12	1,845,152.76	1,968,806.14	1,926,475.98	1,884,195.75	1,862,797.07	1
Ly EOP C	1,709,107.55	1,576,919.48	1,710,715.99	1,614,253.09	1,523,038.26	1,475,803.40	1,735,835.25	1,660,762.78	1,567,304.18	1,515,462.79	1
Wp EOP C var Ly %	13.1 %	18.6 %	13.8 %	18.1 %	22.5 %	25.0 %	13.4 %	16.0 %	20.2 %	22.9 %	6
									0		
Wp Stock to Sales Ratio C	97.25	32.62	31.57	49.07	49.09	94.46	91.22	48.58	47.50	89.24	6
Ly Stock to Sales Ratio C	87.51	28.83	26.62	43.11	41.58	77.13	72.96	42.83	40.95	74.23	9
Wp Forward Cover C	44.88	43.80	44.72	43.70	42.68	41.68	42.62	41.59	40.57	39.56	ŝ
Ly Forward Cover C	40.81	38.56	40.74	38.72	37.02	35.48	39.45	37.97	35.89	34.26	8

Figure 7–24 Receipts and Inventory View

After you have created an achievable receipts and inventory plan, continue to the Gross/Net Margin Plan to see if your sales and inventory plans achieve the gross margin goal you have been given.

Review and Adjust Gross Margin Plan

Use the Gross Margin view to evaluate the gross margin created from your sales and markdown plan and receipts and inventory plan. Determine whether the planned gross margin meets your gross margin goal. If it does not, return to the Sales and Markdown Plan and Inventory and Receipt Plan steps to adjust your receipt markups and receipt flow. When you return to the Plan Sales and Markdowns view, adjust the markdown plans, but do not change the sales. Continue this process until you are satisfied with the gross margin.

Brok & Mortar = 100000 Gr									· 📖	Calendar Measure
	Find	- 3	1 BP	03 🔒	÷	0 49 49				
	2/8/2020	2/15/2020	2/22/2020	2/29/2020	3/7/2020	3/14/2020	3/21/2020	3/28/2020	4/4/2020	4/11/2020
Wp GM R	20,091.91	59,283.58	59,247.73	39,679.33	38,822.24	19,744.83	20,225.21	40,525.60	40,554,44	21,111.82
Wp GM R %	50.0 %	50.0 %	50.0 %	50.0 %	50.0 %	50.0 %	50.0 %	50.0 %	50.0 %	50.0 %
Ly GM R	20,091.91	59,283.58	59,247.73	39,679.33	38,822.24	19,744.83	20,225.21	40,525.60	40,554.44	21,111,82
Ly GM R %	50.0 %	50.0 %	50.0 %	50.0 %	50.0 %	50.0 %	50.0 %	50.0 %	50.0 %	50.0 %
Wp GM R var Ly %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Wp Vendor Funds R	3,064.41	9,236.42	9,488.21	6,411,73	6,186.62	2,980.04	2,971.95	6,386.19	6,092.94	3,301.8
Ly Vendor Funds R	3,064,41	9,236.42	9,488.21	6,411.73	6,186.62	2,980.04	2,971.95	6,386.19	6,092.94	3,301.8
Wp Royallies R	1,509.50	4,564.83	4,587.92	3,149.39	3,095.69	1,502.88	1,586.12	3,241.53	2,996.28	1,537.6
Ly Royallies R	1,509.50	4,564.83	4,587.92	3,149.39	3,095.69	1,502.88	1,586.12	3,241.53	2,996.28	1,537.6
Wp Royaties R %	3.8 %	3.8 %	3.9 %	4.0 %	4.0 %	3.8 %	3.9 %	4.0 %	3.7 %	3.6 %
Ly Royatties R %	3.8 %	3.8 %	3.9 %	4.0 %	4.0 %	3.8 %	3.9 %	4.0 %	3.7 %	3.6 %
Wp Net GM R	24,477.92	70,416.92	70,529.62	48,147.39	46,917.62	24,106.43	24,521.61	48,929.83	48,579.09	25,754.4
Wp Net GM R %	60.9 %	59.4 %	59.5 %	60.7 %	60.4 %	61.0 %	60.6 %	60,4 %	59.9 %	61.0 %
Ly Net GM R	24,484.48	70,592.69	70,811.65	48,204.82	47,008.15	24,116.69	24,541.25	48,965.12	48,634.33	25,759.7
Ly Net GM R %	60.9 %	59.5 %	59.8 %	60.7 %	60.5 %	61.1 %	60.7 %	60.4 %	60.0 %	61.0 %
Wp Net GM R var Ly %	0.0 %	-0.2 %	-0.4 %	-0.1 %	-0.2 %	0.0 %	-0.1 %	-0.1 %	-0.1 %	0.0 %
Wp Net Sales R	40,184.84	118,568.27	118,496.55	79,359.88	77,645.64	39,490.70	40,451.61	81,052.52	81,110.05	42,224.7
Ly Net Sales R	40,184.84	118,568.27	118,496.55	79,359.88	77,645.64	39,490.70	40,451.61	81,052.52	81,110.05	42,224.7
Wp Net Sales R var Ly %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Wp Net Sales C	20,092.93	59,284.69	59,248.82	39,680.55	38,823.40	19,745.87	20,226.40	40,526.92	40,555.61	21,112.9
Ly Net Sales C	20,092.93	59,284,69	59,248.82	39,680.55	38,823.40	19,745.87	20,226.40	40,526.92	40,555.61	21,112.9

Figure 7–25 Gross Margin View

If the Wholesale Franchise or Local Currency options are provisioned, then there are additional views to support planning Gross Margin specifically catered to those options:

W/F - Gross Margin

Seed Plan Sales/Marko	downs Invent	ory/Receipts	Gross/Net I	Margin			
W/F - Gross Margin	n						
Location Product Brick & Mortar = 30010 Denir							
🖿 🖬 🕍 📐	Find	- 4	∂ B ?	03	🔅 xvz 🛱	49 49	
	2/8/2020	2/15/2020	2/22/2020	2/29/2020	3/7/2020	3/14/2020	3/21/2020
Wp W/F GM R	0.00	0.00	0.00	0.00	0.00	0.00	0.0
Wp W/F GM R %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Ly W/F GM R	0.00	0.00	0.00	0.00	0.00	0.00	0.0
Ly W/F GM R %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Wp W/F GM R var Ly %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 9
+							
Wp W/F Net Sales R	86,374.43	129,575.83	129,632.84	172,719.87	84,778.84	42,412.78	42,491.7
Ly W/F Net Sales R	90,693.15	138,054.62	136,114.48	181,355.88	89,017.78	44,533.42	44,616.3
Wp W/F Markdown R	0.00	0.00	0.00	0.00	0.00	0.00	0.0
Ly W/F Markdown R	0.00	0.00	0.00	0.00	0.00	0.00	0.0
Merch Plan Notes							
	<						

Figure 7–26 W/F - Gross Margin View

• Local - Gross Margin

Seed Plan Sales/Marko	Iowns Invent	ory/Receipts	Gross/Net I	Margin				
🖌 Local - Gross Marg	jin							
Location Product	K<>>							
Brick & Mortar = 30010 Denir	n =							
🖿 🖬 🕍 🗠	Find	• 4	1	CS 🛛	🌼 xv2 👸	49 40		
	2/8/2020	2/15/2020	2/22/2020	2/29/2020	3/7/2020	3/14/2020	3/21/2020	3/28/2020
Wp GM LR	43,186.92	64,787.61	64,816.12	86,359.61	42,389.12	21,206.07	21,245.54	21,256.1
Wp GM LR %	50.0 %	50.0 %	50.0 %	50.0 %	50.0 %	50.0 %	50.0 %	50.0 9
Ly GM LR	45,346.27	68,026.99	68,056.93	90,677.59	44,508.58	22,266.37	22,307.82	22,318.9
Wp GM LR var Ly %	-4.8 %	-4.8 %	-4.8 %	-4.8 %	-4.8 %	-4.8 %	-4.8 %	-4.8 9
-								
Wp Net GM LR	58,250.79	86,447.11	87,711.97	116,149.26	57,753.84	28,741.22	29,018.42	28,993.6
Wp Net GM LR %	67.4 %	66.7 %	67.7 %	67.2 %	68.1 %	67.8 %	68.3 %	68.2
Ly Net GM LR	61,163.33	90,769.47	92,097.57	121,956.72	60,641.53	30,178.28	30,469.34	30,443.3
Wp Net GM LR var Ly %	-4.8 %	-4.8 %	-4.8 %	-4.8 %	-4.8 %	-4.8 %	-4.8 %	-4.8
+								
Wp Net Sales LR	86,374.43	129,575.83	129,632.84	172,719.87	84,778.84	42,412.78	42,491.76	42,513.0
Ly Net Sales LR	90,693.15	136,054.62	136,114.48	181,355.86	89,017.78	44,533.42	44,616.35	44,638.6
Wp Net Sales LR var Ly %	-4.8 %	-4.8 %	-4.8 %	-4.8 %	<mark>-4</mark> .8 %	-4.8 %	-4.8 %	-4.8
Wp Net Sales LC	43,187.50	64,788.22	64,816.71	86,360.26	42,389.71	21,206.71	21,246.22	21,256.8
	<		a standal di		10000			

Figure 7–27 Local - Gross Margin View

Now that you have developed your gross margin plans, continue to the Review and Reconcile to Department Targets step.

Review and Reconcile: Review with Target

After you have seeded, you need to review the department targets that the Merch Targets user has created for you. The purpose of reviewing the targets is so that you can understand the goal that your plan should meet.

The Review with Target view contains the Merch Targets target (Tgt) measures as well as last year (Ly) measures. Use this view to compare the Tgt measures to the corresponding Ly measures. By understanding how the Merch Targets compare to last year's metrics, you can better understand what your plan needs to achieve.

Brick & Mortar = 500 Wome										
	Find	- 4	∂ ₿ ?		🗧 XYZ 🔒	₩ 2 ₩ 2				
	2/8/2020	2/15/2020	2/22/2020	2/29/2020	3/7/2020	3/14/2020	3/21/2020	3/28/2020	4/4/2020	4/11/2020
Wp Sales R	870,500.39	1,061,633.94	1,269,472.86	1,471,233.07	1,084,892.53	923,938.01	903,281.57	832,949.16	833,659.18	1,121,844.63
Tgt Sales R	870,500.39	1,061,633.94	1,269,472.86	1,471,233.07	1,084,892.53	923,938.01	903,281.57	832,949.16	833,659.18	1,121,844.63
Wp Sales R var Tgt %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	<mark>0.0 %</mark>	0.0 %	0.0 %	0.0 %
Wp Net Sales R	522,339.25	631,714.03	749,886.42	865,378.16	644,704.67	552,507.28	541,569.37	502,275.30	502,505.51	998,324.59
Tgt Net Sales R	522,339.25	631,714.03	749,886.42	865,378.16	644,704.67	552,507.28	541,569.37	502,275.30	502,505.51	998,324.59
Wp Net Sales R var Tgt %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Wp Net Sales C	261,176.86	315,864.32	374,951.09	432,697.33	322,359.74	276,260.92	270,791.99	251,145.20	251,259.86	499,169.87
Tgt Net Sales C	261,176.86	315,864.32	374,951.09	432,697.33	322,359.74	276,260.92	270,791.99	251,145.20	251,259.86	499,169.87
Wp Net Sales C var Tgt %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Wp Receipts C	0.00	0.00	1,966,162.17	0.00	0.00	0.00	2,287,379.89	0.00	0.00	0.00
Tgt Receipts C	0.00	0.00	1,966,162.17	0.00	0.00	0.00	2,287,379.89	0.00	0.00	0.00
Wp Shrink C	1,711.09	2,696.10	3,985.58	5,512.61	2,723.81	2,080.78	1,367.45	1,304.49	1,287.41	8,067.20

Figure 7–28 Review with Target View

Retrieving Updated Department Targets

If the Merch Plan user updates the department targets after you have created your subclass plans, you must retrieve those new targets. You can retrieve them in one of two ways. You can build a new workbook that uses the updated department targets from the domain. Or, if you want to bring the new targets into one of your existing tasks, you can refresh the task.

Refresh the Workbook

When refreshing a workbook, you can run a refresh rule group that has been configured to retrieve data from the master database.

To refresh a workbook, click **Refresh** in the toolbar. Or, choose the **Refresh** option from the **Edit** menu. Since only one rule group exists for this workbook template, there are no options to choose from. The one refresh rule group runs, and measures configured in that rule group are updated.

Figure 7–29 Refreshing a Workbook

🐼 Commit status: Never Committed 🚯 📇 🛃 🛼 🤛 🔹 📋 🔾 🗸 😨

For more information about the refresh option, see the *Oracle Retail Predictive Application Server User Guide for the Fusion Client*. For information about creating refresh rule groups, see the *Oracle Retail Predictive Application Server Configuration Tools User Guide*.

After you have reviewed and compared the Merch Targets to the last year metrics, continue to the next step: Sales and Markdown Plan.

Reconcile to Department Targets

After you have created your plan, use the default measure profile located on the Review with Target worksheet view to reconcile the Merch Plan to Department Targets.

Brick & Mortar 🗧 500 Wome	n's Casuals Tradit	ional								
	Find	• 4	ĵ ∎		🐝 xyz 🔒	42 43				
	2/8/2020	2/15/2020	2/22/2020	2/29/2020	3/7/2020	3/14/2020	3/21/2020	3/28/2020	4/4/2020	4/11/2020
Wp Sales R	870,500.39	1,061,633.94	1,269,472.86	1,471,233.07	1,084,892.53	923,938.01	903,281.57	832,949.16	833,659.18	1,121,844.6
Tgt Sales R	870,500.39	1,061,633.94	1,269,472.86	1,471,233.07	1,084,892.53	923,938.01	903,281.57	832,949.16	833,659.18	1,121,844.6
Wp Sales R var Tgt %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Wp Net Sales R	522,339.25	631,714.03	749,886.42	865,378.16	644,704.67	552,507.28	541,569.37	502,275.30	502,505.51	998,324.5
Tgt Net Sales R	522,339.25	631,714.03	749,886.42	865,378.16	644,704.67	552,507.28	541,569.37	502,275.30	502,505.51	998,324.5
Wp Net Sales R var Tgt %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 9
20										
Wp Net Sales C	261,176.86	315,864.32	374,951.09	432,697.33	322,359.74	276,260.92	270,791.99	251,145.20	251,259.86	499,169.8
Tgt Net Sales C	261,176.86	315,864.32	374,951.09	432,697.33	322,359.74	276,260.92	270,791.99	251,145.20	251,259.86	499,169.8
Wp Net Sales C var Tgt %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 9
Wp Receipts C	0.00	0.00	1,966,162.17	0.00	0.00	0.00	2,287,379.89	0.00	0.00	0.0
Tgt Receipts C	0.00	0.00	1,966,162.17	0.00	0.00	0.00	2,287,379.89	0.00	0.00	0.0

Figure 7–30 Review and Reconcile - Review with Target View

After you are satisfied that the plan you have created sufficiently meets the Merch Targets, you can submit your plan to the Merch Target user. For more information about submitting the plan, see the Review and Submit Plan Step.

Review with Location Plan

Use these two measure profiles to compare your plan. This view is used to reconcile with the location plan, if such a plan is available.

- Wp/LPCp
- Wp/OpCp

Location Product	< < > >									
Brick & Mortar = 500 Wome	n's Casuals Traditi	ional =								
	Find	- 🎝	∂ B ?		🧯 xxz 👸					
	2/8/2020	2/15/2020	2/22/2020	2/29/2020	3/7/2020	3/14/2020	3/21/2020	3/28/2020	4/4/2020	4/11/2020
Wp Sales R	870,500.39	1,061,633.94	1,269,472.86	1,471,233.07	1,084,892.53	923,938.01	903,281.57	832,949.16	833,659.18	1,121,844.63
LP Cp Sales R	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Wp Sales R var LP Cp %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
*										
Wp Net Sales R	522,339.25	631,714.03	749,886.42	865,378.16	644,704.67	552,507.28	541,569.37	502,275.30	502,505.51	998,324.59
LP Cp Net Sales R	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Wp Net Sales R var LP Cp %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
Wp Net Sales C	261,176.86	315,864.32	374,951.09	432,697.33	322,359.74	276,260.92	270,791.99	251,145.20	251,259.86	499,169.87
LP Cp Net Sales C	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Wp Net Sales C var LP Cp %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
Wp Receipts C	0.00	0.00	1,966,162.17	0.00	0.00	0.00	2,287,379.89	0.00	0.00	0.00
LP Cp Receipts C	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Wp Shrink C	1,711.09	2,696.10	3,985.58	5,512.61	2,723.81	2,080.78	1,367.45	1,304.49	1,287.41	8,067.20
LP Cp Shrink C	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Figure 7–31 Review with Location Plan

Figure 7–32 Review with Location Plan, CP Values (Profile Wp/LPOp)

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	2/8/2020	2/15/2020	2/22/2020	2/29/2020	3/7/2020	3/14/2020	3/21/2020	3/28/2020	4/4/2020	4/11/2020
Wp Sales R	870,500.39	1,061,633.94	1,269,472.86	1,471,233.07	1,084,892.53	923,938.01	903,281.57	832,949.16	833,659.18	1,121,844.63
LP Op Sales R	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Wp Sales R var LP Op %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
10				e			u 01			
Wp Net Sales R	522,339.25	631,714.03	749,886.42	865,378.16	644,704.67	552,507.28	541,569.37	502,275.30	502,505.51	998,324.59
LP Op Net Sales R	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Wp Net Sales R var LP Op %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
\$6										
Wp Net Sales C	261,176.86	315,864.32	374,951.09	432,697.33	322,359.74	276,260.92	270,791.99	251,145.20	251,259.86	499,169.87
LP Op Net Sales C	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Wp Net Sales C var LP Op %	-100.0 %	-100.0 %	-100.0 <mark>%</mark>	-100.0 %	-100.0 %	-100.0 %	-100.0 %	- <mark>100.0 %</mark>	<mark>-100.0 %</mark>	-100.0 %
Wp Receipts C	0.00	0.00	1,966 <mark>,1</mark> 62.17	0.00	0.00	0.00	2,287,379.89	0.00	0.00	0.00
LP Op Receipts C	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Wp Shrink C	1.711.09	2.696.10	3.985.58	5.512.61	2,723,81	2.080.78	1.367.45	1.304.49	1.287.41	8.067.20

Review and Submit Plan

When you are ready to submit your working plan to the Merch Targets user for approval, continue to Review and Submit Plan task.

1. In the taskflow, click the **Open** icon in the Review and Submit Plan task.

Note: You can either open a workbook or create a new workbook. If you have committed the workbook used in the previous task, you can build a new one and see the data you need. If you did not commit that one, you must open it to complete this process.

Figure 7–33 Open Workbook Icon for Review and Submit Plan Task

🖺 Create Merch Plan			
Task or Step		Acti	on
🖌 📋 Create Merch Plan	4	B	ß
Create Plan	4	B	ß
Review and Reconcile	4	B	ß
Review and Submit Plan	4	B	ß
In Season Review and Re-proj	4	B	ß
In Season Submit Plan	4	B	ß

2. The Open Workbook dialog box opens. Select the workbook that you want to submit and click **Open Workbook**.

Figure 7–34 Open Workbook Dialog Box

View +	<u>بة الج</u>	ename 💥 De <u>l</u> ete	Find	4 6				
Name		Task Name	Owner Group	Owner	Mod Date	Created Date	Access	Aler
Departmen	t Dian	Orente Merch Dian	Admin	Laura Hunn	Feb 5, 2020 4:04:59	Feb 5, 2020 2:35:04	User	(
Jeparanen	il Pian	Create Merch Plan	Admin	Laura Hunn	Feb 5, 2020 4.04.59	1 00 0, 2020 2.00.04	Usei	
Departmen	il Plan		Admin		reb 3, 2020 4.04.39	1000,20202.00.04	USEI	

3. The workbook opens at the Submit Plan view.

Submit and Approve Plan

When you are ready to submit your working plan to the Merch Targets user for approval, use the Submit Plan view.

Note: When the Op Approve Enabled measure is selected, you can submit a plan for the Op version. This measure is set by an administrator in the Enable OP Approval administration task. The administrator can select or deselect this option at any time. If the administrator deselects it during the in-season, you will not be able to submit a plan for the Op. The administrator may choose to do this after the planning process has been finalized in order to lock down the Op. If this occurs, you will be unable to submit a plan for the Op and the Merch Targets user will be unable to approve a plan for the Op.

Figure 7–35 Submit and Approve Plan View

1. Submit and Applet 1.	prove Plan	
Brick & Mortar = all (Product		
	Find	- 4 6 5
	H1 TY	H2 TY
Wp Submit		
Wp Submit Notes		
Wp Submit Info	adm : 05 Feb 2020 :	adm : 05 Feb 2020 :
Wp Approval Status	Approved	Approved
Wp Copy Approved Plan		

- 1. Select to submit the working plan by using the Wp Submit measure. Options are Submit Op Only, Submit Cp Only, or Submit Op and Cp.
- **2.** Optional: Enter information about the working plan in the Wp Submit Notes measure.
- 3. Click the Submit button at the top right of the view.
- 4. A success message is displayed. Click OK to close it.

Figure 7–36 Success Message - Plan Submitted

Custom Menu Response	0
Merch Plan submitted successfully!	
	ОК

As a result of running the submit custom menu, the Wp Submit and Wp Submit Info measures are cleared and the Wp Approval Pending check boxes are checked. The Wa Submit By, Wa Submit Date, and Wa Submit Info measures are populated. In addition, your working plan is copied into a Waiting for Approval (Wa) plan. After the Merch Targets user approves or rejects the Wa plan, you can see the approval or rejection information by accessing the Review Plan Approval Status view in the Original Plan Submit step.

Brick & Mortar = 30018 Short	Sleeve Tees									
	Find	- 4	1		🔆 🛛 🕻					
Measure [Label]	W1 of TY	W2 of TY	W3 of TY	W4 of TY	W5 of TY	W6 of TY	W7 of TY	W8 of TY	W9 of TY	W10 of TY
Wa Sales R	57,723.30	115,452.64	115,412.93	115,416.66	115,405.21	115,521.05	118,119.03	59,951.29	60,037.78	120,015.49
Wa Sales Reg+Promo R	47,372.57	93,443.19	93,124.92	93,252.64	92,663.48	93,172.55	94,686.87	48,701.68	48,851.12	96,259.80
Wa Sales Clr R	10,350.73	22,009.45	22,288.01	22,164.02	22,741.73	22,348.50	23,432.16	11,249.61	11,186.66	23,755.69
Wa Net Sales R	34,932.78	67,513.15	67,366.58	67,394.74	67,427.30	67,415.40	68,962.55	36,154.96	36,153.93	106,340.89
Wa Net Sales Reg+Promo R	28,196.46	54,197.01	54,012.46	54,086.53	53,744.78	54,040.06	54,918.36	28,967.43	29,053.35	84,679.13
Wa Net Sales Clr R	6,736.32	13,316.14	13,354.12	13,308.21	13,682.52	13,375.34	14,044.19	7,187.53	7,100.58	21,661.76
Wa Markdown R	4,103.74	8,200.46	8,344.57	8,817.57	8,594.89	7,737.40	8,160.12	4,386.18	4,592.91	13,537.10
Wa Markdown Reg+Promo R	3,317.11	6,598.03	6,689.00	7,081.68	6,867.52	6,179.67	6,483.31	3,524.09	3,690.08	10,771.29
Wa Markdown Clr R	786.63	1,602.43	1,655.57	1,735.89	1,727.37	1,557.73	1,676.81	862.09	902.83	2,765.81
Wa GM R	15,017.13	27,642.21	27,584.63	27,609.32	27,345.88	27,694.41	28,421.50	15,442.30	15,436.67	42,578.62
Wa Net GM R	17,066.60	30,705.11	30,655.89	31,073.79	30,734.28	30,896.11	31,837.29	17,525.37	17,525.31	44,760.78
Wa BOP R	4,920,032.25	4,880,200.97	4,799,519.31	5,148,417.82	5,068,199.71	4,987,325.77	4,907,002.50	5,399,341.13	5,357,915.82	5,316,481.32
Wa Receipts R	0.00	0.00	429,446.47	0.00	0.00	0.00	574,375.55	0.00	0.00	0.00
Wa Shrink R	88.96	790.42	813.72	732.32	971.28	998.30	873.77	0.00	67.08	2,337.47
Wa MOS R	0.00	939.80	984.09	647.29	711.13	881.30	954.84	0.00	0.00	2,016.71
Wa Move to Cir R	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Figure 7–37 Submitted and Approved Plan View

Next Steps

After you have submitted your plan to the Merch Targets user, the Merch Targets user approves or rejects your submitted plan.

If the plan is approved, you must run the custom menu, Copy Approved Plan, in order to move the approved Wa to the Cp/Op versions.

If the plan is rejected, adjust your plan using the steps described in this chapter and submit it again. Since you have already created a working plan, there is no need to seed the task again unless you want to start again with Ly (Last Year) data.

Create Location Targets Task

The Create Location Targets task is the process in which planners create the financial targets for the individual locations. These targets are then reconciled to the location plan to ensure proper execution.

Building the Workbook

To build the Location Targets workbook, complete the following steps.

1. Click the **Create New Workbook** icon in the Create Location Targets task.

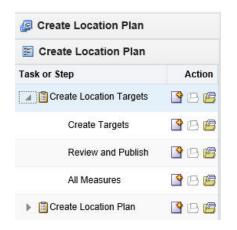


Figure 8–1 Create Location Targets Task

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

						-0						
				Select Caler	dar S	elect PoC						
Select Ca	lendar					Selected 0	Calendar					
Available	Items					Selected	Items					
View *	Dimension	Find	₽ @	🛃 Detach		View -	Dimension	Find	4	Û	含	\$ »
Label						Label						
Ha	lf1 FY2017			<u>^</u>	0	🗸 Hat	f1 FY2020					
На	lf2 FY2017				<mark>≫ A</mark> dd	🗸 Hat	f2 FY2020					
Ha	lf1 FY2018				≫ Add Aļi							
На	lf2 FY2018			ш	<u>Remove</u>							
Ha	lf1 FY2019											
Ha	lf2 FY2019				然 Re <u>m</u> ove All							
🗸 Ha	lf1 FY2020											
🗸 Ha	lf2 FY2020			-								
												»
					is, tap on individual it							
V Synchroi	nize Hierarchies											

Figure 8–2 Workbook Wizard: Calendar Selection

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

				C)								
elect Po	c			Select C	alenua		lect PoC Selected F	200					
Available	-						Selected						
View *	Dimension	Find	₽ ∂	🛃 Detach			View *	Dimension	Find	₽	û	📩 🏟	»
Label				• -			Label						•
~ 10	00 Charlotte				-		√ 100	0 Charlotte					
v 10	01 Atlanta					Add	✓ 100	11 Atlanta					
10	1002 Dallas					≫ Add Aļi							
10	1003 Boston					<u>Remove</u>							
10	1003 Boston 1004 New York												
10	05 Philadelphia					《 Remove All							
10	06 Chicago												
10)7 Minneapolis				-								
													»
						tap on individual ite							
☑ Synchroi	nize Hierarchies						Cance		vious		Next		Finish

Figure 8–3 Workbook Wizard: Location Selection

Plan Sales/Gross Margin% View

After you have seeded, develop the Sales and Gross Margin% targets for those locations.

📕 Product Location	< < > >									
1 Acme = 1000 Charlotte =										
	Find	- 4	∂ ₿ ?		👾 xyz 🔒	42 ₹				
	2/8/2020	2/15/2020	2/22/2020	2/29/2020	3/7/2020	3/14/2020	3/21/2020	3/28/2020	4/4/2020	4/11/2020
Wp Sales R	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0
Fost Sales R	102,948.70	95,682.32	172,250.29	175,181.71	116,890.89	106,433.00	95,675.53	91,522.70	87,344.84	88,114.5
Wp Sales R var Fcst %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 9
Ly Sales R	86,790.87	156,312.10	158,954.25	105,958.31	96,513.68	86,771.94	82,999.96	79,228.22	79,921.02	89,672.0
Wp Sales R var Ly %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
Wp Avg Sales R per Location	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0
Wp Avg Sales R per Sq M	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0
•										
Wp Net Sales R	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0
Ly Net Sales R	55,672.75	100,561.81	101,783.32	66,479.65	61,293.76	54,841.02	52,912.66	50,728.15	51,899.26	79,058.9
Wp Net Sales R var Ly %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 9
Wp Avg Net Sales R per Location	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0
Wp Avg Net Sales R per Sq M	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0
Wp GM R %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0
Ly GM R %	50.0 %	50.0 %	50.0 %	50.0 %	50.0 %	50.0 %	50.0 %	50.0 %	50.0 %	50.0 *

Figure 8–4 Plan Sales/Gross Margin% View

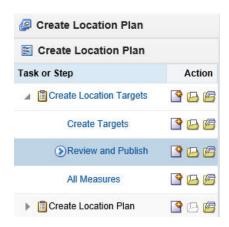
If the Local Currency option is provisioned, then an additional view is available to support planning Sales/Gross Margin% that specifically caters to this option:

Local Currency Plan

Review and Publish

In this step, review the targets you created. Use the Publish Targets custom menu when you are ready to publish the targets you created.





At the Review Targets step, review the targets you created in the Create Targets step. Use the Location Op Plan and Location Cp Plan measure profiles to reconcile your plan to the top down targets.

Figure 8–6 Review & Reconcile View

Product Location	< < > >									
III 🖬 🕍 📐	Find	- 4	1	D3 🚦	ž vi	1 de de				
	2/8/2020	2/15/2020	2/22/2020	2/29/2020	3/7/2020	3/14/2020	3/21/2020	3/28/2020	4/4/2020	4/11/2020
Wp Net Sales R	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Op Net Sales R	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Wp Net Sales R var Op %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
,										
WpGMR%	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Op GM R %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Wp Returns R %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Wp Returns R	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Op Returns R %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Op Returns R	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Publish

Publishing a target copies the Wp measure information to the Tgt measures in your task, and then it commits them to the database so that location plan users can retrieve those targets.

Figure 8–7 Publish View

Product Location	K<>>	
	Find	- 4
	Half1 FY2020	Half2 FY2020
Wp Publish Targets		
Wp Publish Notes		

Review Targets

This view allows you to review your published Tgt measures.

Figure 8–8 Review Targets View

Product Location	< < > >									
	Find	- 4	∂ B ?		ž 🕺 🕅	42 VI				
	2/8/2020	2/15/2020	2/22/2020	2/29/2020	3/7/2020	3/14/2020	3/21/2020	3/28/2020	4/4/2020	4/11/2020
Tgt Net Sales R	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0
Tgt Net Sales U	0	0	0	0	0	0	0	0	0	
Tgt Net Sales AUR	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0
2			с — й							
Tgt GM R %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0
2			с — 34							
Tgt Returns R %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0
Tgt Returns R	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0
Tgt Returns U	0	0	0	0	0	0	0	0	0	
Tgt Returns AUR	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0

All Measures

The purpose of this workbook is to allow you to create a view of workbook measures that you may not be able to view all at once in other views.

Figure 8–9 All Measures

Create Location Plan	
🖹 Create Location Plan	
Task or Step	Action
A ECreate Location Targets	2 🕒 🖻
Create Targets	2 🕒 🖻
Review and Publish	2 🕒 🖻
All Measures	2 🖸 😰

All Measures View

The All Measures view contains all the measures contained in the workbook; however, only the Wp Sales R measure is visible in the default measure profile.

Figure 8–10 All Measures View

All Measures										
Product Location	K < > >									
💷 🔟 ဲ	Find	- 🌵	d B		XYZ (🔒 🔂 🖓				
	Find 2/8/2020	2/15/2020	2/22/2020	2/29/2020	م میں میں میں میں میں میں میں میں میں می	3/14/2020	3/21/2020	3/28/2020	4/4/2020	4/11/202

Create Location Plan Task

Location Planning is the process during which planners create the location plans at the Store level. These plans are then compared to and reconciled against the Merch Plan.

Building the Workbook

To build the workbook, complete the following steps:

- 1. Click the Create New Workbook icon in the Create Location Plan task.
- 2. The Product Selection step of the workbook wizard is displayed. Select the department you want to plan and move it to the Selected Items box. Click Next.

Figure 9–1	Workbook Wizard: Product Selection	
		_

			Select	Product	Select Calendar	SI	elect PoC						
Select Pro	oduct					Selected F	Product						
Available	Items					Selected	ltems						
View *	Dimension	Find	4	🛃 Detach		View +	Dimension	Find	₽	ŵ	ė	14	»
Label				• •		Label						2	•
10	0 Men's Footwear	n			<mark>≫</mark> <u>A</u> dd	✓ 500) Women's Casu	als Tradit	ional				
20	0 Women's Footw	vear											
30	0 Men's Casuals				≫ Add All								
	0 Mens Tops				🔇 <u>R</u> emove								
	0 Women's Casu				🐝 Remove All								
	5 Women's Casu		iion										
60	0 Women's Class	sics											
													»
📝 Synchro	Ose Drag an nize Hierarchies	no Drop to ao	o Available In	ns, tap on individual if	em ano Ado for	multiple selectio	ins, or Ad	a All for	an ner	ms.			

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

							0				
			Selec	t Calendar	Saled PoC	Sele	d Product				
select Ca	lendar					Selected C	alendar				
Available	Items					Selected	Items				
View +	Dimension	Find.	4 9	Detach		View -	Dimension	Find.	4 9		ж
Label						Label					
HI	3LY					✓H1 ¹	TY				
H2	3LY					VH21	TY				
HI	LLY				944						
H2	LUY				🔉 Add All						
HI	th.				& Bemove						
H2	LY										
~H1	TY				Remove All						
✓ H2	TY										
HI	NY										
H2	NY										
	U	se Drag and Dr	op to add Availal	ble items to Selected	items, use shift-click	and Add for mult	ple selections, o	Add All for	all items.		
2 Synchron	nize Hierarchies										
						Canco	d Pro-	dates	Next	Einish	

Figure 9–2 Workbook Wizard: Calendar Selection

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

					0	3-								
					Select C	alen	dar S	elect PoC						
elect Po	3							Selected F	PoC					
Available	Items							Selected	Items					
View *	Dimension	Find	₽	Ŷ	🛃 Detach			View +	Dimension	Find	₽	Û	1	a »
Label					• •			Label						• •
v 100	0 Charlotte					Â		√ 100	00 Charlotte					
v 100	1 Atlanta						Add	√ 100)1 Atlanta					
100	2 Dallas						≫ Add Aļi							
100	3 Boston						Remove							
100	4 New York													
100	5 Philadelphia						Kemove All							
100	6 Chicago													
100	7 Minneapolis					-								
														»
Synchron	Use Drag ar ize Hierarchies	nd Drop to ac	ld Availat	ole iten	ns to Selecteo	i item	s, tap on individual it	em and Add for	multiple selec	lions, or Ad	d All for	all iten	ns.	

Figure 9–3 Workbook Wizard: Location Selection

Create Location Plan

This section describes location plan creation.

Seed Plan

The user can seed from Last Year (Ly), Forecast (Fcst), and Targets (Tgt*). Table 9–1 lists the measures that are seeded for different seeding options. Note that only Target measures that correspond to Variance to Ly (varLy) measures are seeded.

Seeded Measure	Seed With Version	
Wp Sales R	Ly/Fcst/Tgt*	
Wp Sales U	Ly/Fcst/Tgt*	
Wp GM R %	Ly/Tgt	
Wp Returns R %	Ly/Tgt*	
Wp Returns AUR	Ly/Tgt*	
Wp Receipts C	Ly	
Wp Receipts U	Ly	
Wp Shrink C %	Ly	
Wp Shrink AUC	Ly	
Wp Transfers In/Out C	Ly	
Wp Transfers In/Out U	Ly	
Wp W/F Owned by Retailer R %	Ly	
Wp W/F Markup R %	Ly	
Wp W/F Markdown R %	Ly	

Table 9–1 Seeding Options

Sales and Markdowns

After seeding, the user can validate the seeded sales and markdown data in this view.

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	Find	 •	☆ 📑		🏂 xvz 👸	42 43				
	1 110	· · ·		t⊒vat [∃	×- 🛄 🚺					
	2/8/2020	2/15/2020	2/22/2020	2/29/2020	3/7/2020	3/14/2020	3/21/2020	3/28/2020	4/4/2020	4/11/2020
Wp Sales R	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Fost Sales R	27,073.56	27,073.56	27,073.56	27,073.56	27,073.56	27,073.56	27,073.56	27,073.56	27,073.56	27,073.56
Wp Sales R var Fcst %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
Ly Sales R	19,217.12	23,416.88	27,998.43	32,452.72	23,925.95	20,362.52	19,471.66	17,689.94	17,689.94	23,798.68
Wp Sales R var Ly %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
Wp Avg Sales R per Location	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Wp Avg Sales R per Sq M	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
•										
Wp Net Sales R	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Ly Net Sales R	11,188.90	13,581.79	16,239.08	18,822.58	13,877.03	11,810.26	11,293.59	10,260.17	10,260.16	20,795.29
Wp Net Sales R var Ly %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
Wp Avg Net Sales R per Location	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Wp Avg Net Sales R per Sq M	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Wp Net Sales C	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Figure 9–4 Sales and Markdowns View

Plan Sales/Markdowns View

After you have seeded, develop the sales and markdown location plan for those departments. The second tab within the Create Plan step, Sales/Markdowns, has one default view: Plan Sales and Markdowns.

Product Location	< > >									
500 Women's Casuals Tradition	al 🗕 1000 Charlot	te								
	Find	- 4	1		ž 🕅 (9 49 4 1				
	2/8/2020	2/15/2020	2/22/2020	2/29/2020	3/7/2020	3/14/2020	3/21/2020	3/28/2020	4/4/2020	4/11/2020
Wp Sales R	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Fost Sales R	25,746.09	25,746.09	25,746.09	25,746.09	25,746.09	25,746.09	25,746.09	25,746.09	25,746.09	25,746.09
Wp Sales R var Fcst %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
Ly Sales R	19,217.12	23,416.88	27,998.43	32,452.72	23,925.95	20,362.52	19,471.66	17,689.94	17,689.94	23,798.68
Wp Sales R var Ly %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
Wp Avg Sales R per PoC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Wp Avg Sales R per Sq M	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2										
Wp Net Sales R	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Ly Net Sales R	11,188.90	13,581.79	16,239.08	18,822.58	13,877.03	11,810.26	11,293.59	10,260.17	10,260.16	20,795.29
Wp Net Sales R var Ly %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
Wp Avg Net Sales R per PoC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Wp Avg Net Sales R per Sq M	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Wp Net Sales C	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Figure 9–5 Plan Sales/Markdowns View

If Wholesale Franchise or Local Currency options are provisioned, then there are additional views to support planning Sales/Markdowns that specifically cater to these options.

- Local Currency Plan
- Plan W/F Sales and Markup

Local Currency Plan

The Local Currency step displays your plan using the local currency conversion set up by the administrator.

Product Location	< < > >									Cale
500 Women's Casuals Traditio	onal = 1000 Cha	rlotte								Mea:
🗉 🖬 🕍	Find	- 4	1	II 🖬 🛱	XVZ 🔒	₩ 2 ₩ 2				
	2/8/2020	2/15/2020	2/22/2020	2/29/2020	3/7/2020	3/14/2020	3/21/2020	3/28/2020	4/4/2020	4/11/2020
Wp Sales LR	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Ly Sales LR	19,217.12	23,416.88	27,998.43	32,452.72	23,925.95	20,362.52	19,471.66	17,689.94	17,689.94	23,798.6
Wp Sales LR var Ly %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
Wp Avg Sales LR per Location	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0
Wp Avg Sales LR per Sq M	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0
	5							5		
Wp Net Sales LR	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0
Ly Net Sales LR	11,188.90	13,581.79	16,239.08	18,822.58	13,877.03	11,810.26	11,293.59	10,260.17	10,260.16	20,795.2
Wp Net Sales LR var Ly %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
Wp Avg Net Sales LR per	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0
Wp Avg Net Sales LR per	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0
							24			
Wp Markdown LR %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Wp Markdown LR	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0
Ly Markdown LR %	12.7 %	12.9 %	13.6 %	10.8 %	14.0 %	11.2 %	10.1 %	13.6 %	11.9 %	14.4 %
Ly Markdown LR	1,421.63	1,747.78	2,208.27	2,028.48	1,948.03	1,318.97	1,139.84	1,398.72	1,223.72	2,992.1
Wp Markdown LR var Ly %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
Wp Avg Markdown LR per	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0
Wp Avg Markdown LR per	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0

Figure 9–6 Local Currency Plan View

Plan W/F Sales and Markup

If the Wholesale Franchise options are provisioned, then this additional view will be available to plan additional wholesale/franchise measures in this view.

Figure 9–7 Plan W/F Sales and Markup View

	>> Y										
500 Women's Casuals Tr	aditional										
	Find 💌 🦊	∂ ₿		🐝 🗷 👸	₩ 2 ₩ 3						
		W1 of TY	W2 of TY	W3 of TY	W4 of TY	W5 of TY	W6 of TY	W7 of TY	W8 of TY	W9 of TY	W10 of TY
1000 Charlotte	Wp W/F Sales R	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.
	Ly W/F Sales R	11,188.90	13,581.79	16,239.08	18,822.58	13,877.03	11,810.26	11,293.59	10,260.17	10,260.16	20,795.
	Wp W/F Sales R var Ly %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0
	1										
	Wp W/F Net Sales R	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0
	Ly W/F Net Sales R	11,188.90	13,581.79	16,239.08	18,822.58	13,877.03	11,810.26	11,293.59	10,260.17	10,260.16	20,795.
	Wp W/F Net Sales R var Ly %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0
	Wp W/F Markup R %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0
	Wp W/F Markup R	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.
	Ly W/F Markup R %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0
	Ly W/F Markup R	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0
	Wp W/F Markup R var Ly %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0
	Wp W/F Markdown R	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.
	Ly W/F Markdown R	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0
	Wp W/F Markdown R var Ly %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0
	Wp W/F Markdown R %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0

Plan Receipts/Inventory

The third tab within the Create Location Plan step, Inventory/Gross Margin, has two default views: Plan/Receipts and Inventory and Gross Margin.

After you have developed the sales and markdown plan, you develop a receipts and inventory plan that can support the sales and markdown plan. The purpose of this step is to ensure that you have a receipt and inventory plan that supports the sales that you are projecting. Like the Plan Sales and Markdowns View, the Plan Receipts/Inventory view contains several Ly metrics that you can reference when setting your targets. Additional measures can be used to adjust your inventory targets.

Product Location	K < > >									
500 Women's Casuals Tradition	ial 🗕 1000 Charlot	te 🔳								
	Find	- 4	健 ₿		💥 XV2 (1 de VI				
	2/8/2020	2/15/2020	2/22/2020	2/29/2020	3/7/2020	3/14/2020	3/21/2020	3/28/2020	4/4/2020	4/11/2020
Wp BOP C	545,109.84	545,109.84	545,109.84	545,109.84	545,109.84	545,109.84	545,109.84	545,109.84	545,109.84	545,109.84
Ly BOP C	450,457.31	436,634.99	420,270.95	486,277.03	464,036.11	446,173.47	431,767.25	514,873.85	502,299.53	490,018.85
•						-				
Wp Receipts C	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Ly Receipts C	0.00	0.00	42,761.33	0.00	0.00	0.00	48,039.66	0.00	0.00	0.00
Wp Receipts C var Ly %	0.0 %	0.0 %	-100.0 %	0.0 %	0.0 %	0.0 %	-100.0 %	0.0 %	0.0 %	0.0 %
Wp Avg Receipts C per PoC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Wp Avg Receipts C per Sq M	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Wp Shrink C	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Ly Shrink C	75.18	142.75	224.82	171.85	168.43	86.45	0.00	61.52	88.67	376.46
Wp Shrink C var Ly %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	0.0 %	-100.0 %	-100.0 %	-100.0 %
Wp Avg Shrink C per PoC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Wp Avg Shrink C per Sq M	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Figure 9–8 Plan Receipts/Inventory View

Use the Gross Margin view to evaluate the gross margin created from your sales and markdown plan and receipts and inventory plan. Determine whether the planned gross margin meets your gross margin goal. If it does not, return to the Plan Sales and Markdown Plan and Plan Inventory and Receipt Plan steps to adjust your receipt markups and receipt flow. When you return to the Plan Sales and Markdowns view, adjust the markdown plans, but do not change the sales. Continue this process until you are satisfied with the gross margin.

2. Gross Margin										* *
Product Location	10 < > >1									Calendar
1000 Shelf Stable Beverages	. 1000 Charlotte	.							·	Measure
🚥 🖬 🕍	Find	- 8	• 🔒 📴	12 🛽	ů III.	<mark>@ 42</mark> 43				
	2/8/2020	2/15/2020	2/22/2020	2/29/2020	3/7/2020	3/14/2020	3/21/2020	3/28/2020	4/4/2020	4/11/2020
Wp GM R	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Wp GM R %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Ly GM R	4,252.84	6,379.71	5,723.21	3,915.72	4,728.33	3,807.23	4,101,38	4,215.33	5,069.38	4,544.93
Ly GM R %	50.0 %	50.0 %	50.0 %	50.0 %	50.0 %	50.0 %	50.0 %	50.0 %	50,0 %	50.0 %
Wp GM R var Ly %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
Wp Avg GM R per Location	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Wp Avg GM R per Sq M	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Wp Net Sales R	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Ly Net Sales R	8,505.81	12,759.59	11,446.56	7,831.58	9,456.79	7,614.59	8,202.92	8,430.77	10,138.88	9,090.02
Wp Net Sales R var Ly %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
Wp Net Sales C	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Ly Net Sales C	4,252.97	6,379.88	5,723.35	3,915.86	4,728.46	3,807,36	4,101.54	4,215,44	5,069.50	4,545,05
Wp Net Sales C var Ly %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
						2			<u> </u>	
Wp GMROI %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Ly GMROI %	2.0 %	3.2 %	2.8 %	1.8 %	2.3 %	2.0 %	2.0 %	1.9 %	2.5%	2.3 %

Figure 9–9 Gross Margin View

If Wholesale Franchise or Local Currency options are provisioned, then there are additional views to support planning sales and markdowns that specifically cater to these options.

- Local Currency Plan
- W/F Gross Margin

The Local Currency Plan view shows the Gross Margin plan using the local currency conversion set up by the administrator.

Product Location	K<>>									
500 Women's Casuals Tradition	ial 🗕 1000 Charlot	te 📕								
	Find	- 4	∂ ₿ ?		💑 xx2 () ()				
	2/8/2020	2/15/2020	2/22/2020	2/29/2020	3/7/2020	3/14/2020	3/21/2020	3/28/2020	4/4/2020	4/11/2020
Wp GM LR	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0
Wp GM LR %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Ly GM LR	5,594.37	6,790.86	8,119.49	9,411.23	6,938.44	5,905.06	5,646.72	5,130.00	5,130.02	10,397.59
Ly GM LR %	50.0 %	50.0 %	50.0 %	50.0 %	50.0 %	50.0 %	50.0 %	50.0 %	50.0 %	50.0 %
Wp GM LR var Ly %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
Wp Avg GM LR per PoC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Wp Avg GM LR per Sq M	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Wp Net Sales LR	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Ly Net Sales LR	11,188.90	13,581.79	16,239.08	18,822.58	13,877.03	11,810.26	11,293.59	10,260.17	10,260.16	20,795.29
Wp Net Sales LR var Ly %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
Wp Avg Net Sales LR per PoC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Wp Avg Net Sales LR per Sq M	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
•										
Wp Net Sales LC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Ly Net Sales LC	5,594.53	6,790,93	8,119.59	9,411.35	6,938.59	5,905.20	5,646.87	5,130,17	5,130,14	10,397.70

Figure 9–10 Local Currency Plan

The W/F Gross Margin view shows the planned Wholesale Franchise Gross Margin if this option is provisioned.

Figure 9–11 W/F Gross Margin

4. W/F Gross Margin Product Location	K < > >	_								
500 Women's Casuals Tradition	Find	•	∲ B?		ž xvz (n +2 +2				
	2/8/2020	2/15/2020	2/22/2020	2/29/2020	3/7/2020	3/14/2020	3/21/2020	3/28/2020	4/4/2020	4/11/2020
Wp W/F GM R	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0
Wp W/F GM R %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0
Ly W/F GM R	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0
Ly W/F GM R %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0
Wp W/F GM R var Ly %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0
10										
Wp W/F Net Sales R	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0
Ly W/F Net Sales R	11,188.90	13,581.79	16,239.08	18,822.58	13,877.03	11,810.26	11,293.59	10,260.17	10,260.16	20,795.
Wp W/F Net Sales R var Ly %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0

Review and Reconcile to MFP

In this step, review and compare your targets to the top down targets to see if you meet the goals created by the top down user. Use the MFP OP and the MFP CP measure profiles to reconcile your location plan to the Merch Plan targets.

III Product Location	<>>									
500 Women's Casuals Traditi	onal 🖬 Brick & M	ortar								
	Find	- 4	∂ ₿ ?		🔆 xv2 🔒	4 ₽ 4 8				
	2/8/2020	2/15/2020	2/22/2020	2/29/2020	3/7/2020	3/14/2020	3/21/2020	3/28/2020	4/4/2020	4/11/2020
Wp Net Sales R	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
MP Op Net Sales R	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Wp Net Sales R var MP Op %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Wp Net Sales C	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
MP Op Net Sales C	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Wp Net Sales C var MP Op %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Wp Receipts C	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
MP Op Receipts C	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Wp Receipts C var MP Op %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
						2	ĺ			
Wp EOP C	525,251.63	525,251.63	525,251.63	525,251.63	525,251.63	525,251.63	525,251.63	525,251.63	525,251.63	525,251.63
MP Op EOP C	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
WpEOPC var MPOp%	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Wp Forward Cover C	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
MP Op Forward Cover C	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Wp Sell Thru C %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
MP Op Sell Thru C %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %

Figure 9–12 Review and Reconcile

Review and Approve

In this step, the location planner can review and approve the created location plan. The Review and Approve step contains two views: Review Plan and Approve Plan.

Review Plan

In this step, review the location plan you created. Use the Approve Plan custom menu when you are ready to approve the location plan you created. The purpose of reviewing the plan is so that you can understand the goal that your plan should meet.

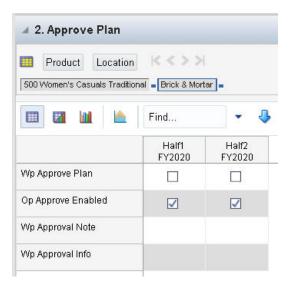
 Product Location 500 Women's Casuals Tradition 	hal = 1000 Charlot	te 🔳								
	Find	- 4	∂ B ?		🐝 xyz (. 49 43				
	2/8/2020	2/15/2020	2/22/2020	2/29/2020	3/7/2020	3/14/2020	3/21/2020	3/28/2020	4/4/2020	4/11/2020
Wp Net Sales R	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0
Op Net Sales R	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0
Wp Net Sales R var Op %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0
₹ű.										
Wp Net Sales C	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0
Op Net Sales C	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0
Wp Net Sales C var Op %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0
27										
Wp Receipts C	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0
Op Receipts C	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0
Wp Receipts C var Op %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0
Wp EOP C	545,109.84	545,109.84	545,109.84	545,109.84	545,109.84	545,109.84	545,109.84	545,109.84	545,109.84	545,109.8

Figure 9–13 Review Plan

Approve Plan

When you are ready to approve your working plan, use the Approve Plan view and custom menu Approve Plan. The approved versions are committed after the process is complete.

Figure 9–14 Approve Plan View



Review and Re-Approve

Use this step to review the location plan during in-season for On Order and Open to Buy and to update the plan and reapprove if necessary. The Review and Re-Approve step has two views: Review and Re-Project Plan and Approve Plan.

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C 🕒 🖻
C 🕒
C 🕒 🖻
C 🖸
B 🕒

Figure 9–15 Review and Re-Approve

Review and Re-Project Plan

In this view, the user can review On Order and Open to Buy during the in-season, adjust the planned inventory data as needed, and re-approve the CP plan.

Figure 9–16 Review and Re-Project Plan

Product Location	K<>>									
500 Women's Casuals Traditio	nal 🗕 1000 Charlot	te 🔳								
💷 🖬 🕍	Find	• 🌵	1		💑 XYZ () ()				
	2/8/2020	2/15/2020	2/22/2020	2/29/2020	3/7/2020	3/14/2020	3/21/2020	3/28/2020	4/4/2020	4/11/2020
Wp ВОР С	545,109.84	545,109.84	545,109.84	545,109.84	545,109.84	545,109.84	545,109.84	545,109.84	545,109.84	545,109.8
Wp Net Sales R	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0
Wp Net Sales C	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0
Wp Markdown R	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0
23.										
Wp Receipts C	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0
Cp Receipts C	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0
Wp Receipts C var Cp %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Wp On Order C	0.00	0.00	48,906.92	0.00	0.00	0.00	48,906.92	0.00	0.00	0.0
Wp On Order Adj C	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0
Wp Net On Order C	0.00	0.00	48,906.92	0.00	0.00	0.00	48,906.92	0.00	0.00	0.0
Wp ОТВ С	0.00	0.00	-48,906.92	0.00	0.00	0.00	-48,906.92	0.00	0.00	0.0
Wp EOP C	545,109.84	545,109.84	545,109.84	545,109.84	545,109.84	545,109.84	545,109.84	545,109.84	545,109.84	545,109.8
Cp EOP C	545,109.84	545,109.84	545,109.84	545,109.84	545,109.84	545,109.84	545,109.84	545,109.84	545,109.84	545,109.8

Approve Plan

When you are ready to reapprove your working plan during the in-season, use this view and the custom menu Approve Plan to re-approve the plan.

Product Location	8	
500 Women's Casuals Traditio	Find	ar]=
	Half1 FY2020	Half2 FY2020
Wp Approve Plan		
Op Approve Enabled		
Wp Approval Note		

Figure 9–17 Approve Plan View

All Measures

The purpose of this workbook is to allow you to create a view of workbook measures that you may not be able to view at the same time in other views.

Figure 9–18 All Measures

Create Location Plan	🕒 🕒 🕼
Create Plan	C 🖸
Review and Reconcile to MFP	🕒 🕒 🕼
Review and Approve	C 🖸
Review and Re-Approve	🕒 🕒 🕼
All Measures	C 🕒

All Measures View

The All Measures view contains all the measures contained in the workbook; however, only the Wp Sales R measure is visible in the default measure profile. All the remaining measures are available via Show/Hide.

Figure 9–19 All Measures View

🔺 All Measures										
Product Location 500 Women's Casuals Traditio			• •		ž m2 (9 49 48				
	2/8/2020	2/15/2020	2/22/2020	2/29/2020	3/7/2020	3/14/2020	3/21/2020	3/28/2020	4/4/2020	4/11/202
Wp Sales R	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.

In-Season Management

Merch Targets and Merch Plan users can both use the Create Merch Plan Targets and Create Merch Plan activity during the in-season to review plans and compare those plans to the season actuals. Merch Targets users review the targets and the plans created by the lower level users and determine how those plans compare to actuals. Merch Plan users can review plans to actuals and also adjust the plans with the Update Department Plans task.

One of the key steps of in-season management is reviewing Open to Buy (OTB). OTB is the amount of money budgeted during the in-season to purchase goods that have not yet been received or ordered. The Merch Plan user can decide in-season how to spend this money to reach strategic targets.

Each role has its own task within the Create Merch Plan Targets and Create Merch Plan activity. The activities of each role are described in this chapter.

The Merch Plan Targets user can use the In Season Review and Re-project Targets task to review the targets and plans created by the lower level users and determine how those plans compare to actuals. The In Season Review and Re-project Targets has six tabs, two of which are used to re-approve an already submitted plan.

- Review and Re-project
- Open to Buy
- Publish Targets
- Projection
- Review Plan
- Approve View

Building the Workbook

To build the In Season Review and Re-project Targets workbook, complete the following steps.

1. Click the **Create New Workbook** icon in the In Season Review and Re-project Targets task.

Create Merch Plan Targets	
Create Merch Plan Targets	
Task or Step	Action
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Create Targets	🕒 🕒 🖉
Review and Publish Targets	🕒 🕒 💋
Review and Approve Plan	🕒 🕒 🛃
In Season Review and Re-pr	oject Targe [🔄 🚝

Figure 10–1 Create New Workbook

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

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Figure 10–2 Workbook Wizard: Calendar Selection

3. The Location Selection step of the workbook wizard is displayed. Select the channels you want to plan and move them to the Selected Items box. Click **Next**.

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Figure 10–3 Workbook Wizard: Select Channel

4. The Product Selection step of the workbook wizard is displayed. Select the product you want to plan and move it to the Selected Items box. Click **Finish**.

Figure 10–4 Workbook Wizard: Select Product

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The workbook is built, and the Review and Re-project view is visible.

Review and Pre-Project

Use the Review and Re-project view to compare your plan to the current plan, the original plan, and last year's actuals. Use the three measure profiles in this view to complete these tasks:

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Figure 10–5 Review and Re-Project Default

Tgt with Cp

Figure 10–6 Review and Re-Project Tgt with Cp

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Figure 10–7 Review and Re-Project Tgt with Op

Open to Buy

The Open to Buy Tab has one view: Open to Buy. Use the Open to Buy view to understand the variance between the current planned receipts and their markup to the on order and any on order adjustments. This variance is shown in the Wp OTB C and Wp OTB AUC% measures. These measures indicate how many additional receipts can be purchased as well as what markup to use in order to purchase these for the current approve receipt retail and markup plan. Users should understand if their planned receipts keep them on the overall Cp EOP inventory plan. To understand the variance between the Cp EOP inventory plan and the Wp EOP inventory plan, users can reference the measure Wp EOP C Var Cp%. Use this view to validate what OTB you have available and then start adjusting your plan. Then, confirm that your updates can be obtained given the OTB constraints that you may have. Use the following best practices to adjust OTB.

• To understand the difference between the current approved receipts and the net on order, compare the Cp Receipts C plan to the Wp Net On Order C.

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	2/8/2020	2/15/2020	2/22/2020	2/29/2020	3/7/2020	3/14/2020	3/21/2020	3/28/2020	4/4/2020	4/11/2020	
Wp BOP C	12,336,330	12,336,330	12,336,330	12,336,330	12,336,330	12,336,330	12,336,330	12,336,330	12,336,330	12,336,330	
Wp Net Sales C	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Wp Net Sales R	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Wp Sales R	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Wp Receipts C	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Cp Receipts C	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Wp On Order C	0.00	0.00	1,381,154.12	0.00	0.00	0.00	1,381,154.12	0.00	0.00	0.00	
Wp On Order AUC	0.00	0.00	22.93	0.00	0.00	0.00	22.93	0.00	0.00	0.00	ł
Wp On Order Adj C	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1
Wp On Order Adj AUC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1
Wp Net On Order C	0.00	0.00	1,381,154.12	0.00	0.00	0.00	1,381,154.12	0.00	0.00	0.00	1
Wp Net On Order AUC	0.00	0.00	22.93	0.00	0.00	0.00	22.93	0.00	0.00	0.00	
Wp EOP C	12,336,330	12,336,330	12,336,330	12,336,330	12,336,330	12,336,330	12,336,330	12,336,330	12,336,330	12,336,330	
Cp EOP C	12,336,330	12,336,330	12,336,330.	12,336,330	12,336,330	12,336,330	12,336,330	12,336,330	12,336,330	12,336,330	1
Wp EOP C var Cp %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	
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Wp OTB C	0.00	0.00	-1,381,154,12	0.00	0.00	0.00	-1,381,154,12	0.00	0.00	0.00	
Wp OTB AUC	0.00	0.00	22.93	0.00	0.00	0.00	22.93	0.00	0.00	0.00	12

Figure 10–8 Open to Buy

Compare the Cp Receipts AUC% plan to the Wp Net On Order AUC%. If receipts are booked for non-elapsed periods, you can enter this Wp Receipt C and Wp Receipt AUC% data into the Wp On Order Adj C and Wp On Order Adj AUC% respectively to capture the Wp OTB measures. For example, this may occur if receipts book daily for the retailer, and OTB is completed on a Tuesday. By using the Wp On Order Adj measures, you can capture all receipts for comparing the Net On Order to the Cp receipt plan.

Update Sales and Markdowns Targets

Use the Review and Re-project tab under In Season Review and Re-project Targets step to adjust the sales and markdown targets for department. The view used in the In Season Review and Re-project Targets step is the Review and Re-project tab view. This view contains several metrics that you can reference when setting your plan. You can use the Ly measures as guidelines for entering data in the corresponding Wp measures.

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Tay Tanka B	39.417	-	-00.94.7	872710	HUTO	12294	04412	364(3	MARK	Dente	48.07.15	40,000	METER C	10.054	42(24)8	41110	11243	1 20
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In technine it	36763	36.652	24,852	8,912	34,04.0	10,000	1100	CLIMIN	10.04.0	JUNCE	32.41.0	36,00.0	TUES	SAMP.	16.942	1528.0	121,06.0	1 24
Ny Venise A	200	81/2628	Mail 18	<050	1.07.5	17.9	12.74.0	8417	1413	100	4.011	4.11.2	11122	5411	4.142	4.010	+211	1.2
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Figure 10–9 Update Sales and Markdowns Targets

In this view, you typically complete the following steps to adjust the sales and markdown plan that reflects what you plan to achieve in the period you are planning.

- 1. Adjust the desired sales plan by week. You can enter amounts for each week. Or, if you know the aggregate amount for a month, quarter, half, or year, you can enter that amount at that level and then let it spread down to the weeks.
- 2. Focus on markdowns by validating the changes you must make.
- **3.** If necessary, you can validate the unit plan by entering data in the average unit retail (AUR) or unit (U) measures.

After you have adjusted the sales and markdown plan, continue to the next step, "Update Receipts and Inventory Plan".

Update Receipts and Inventory Plan

After you have adjusted the sales plan by setting the sales and markdown targets, adjust the inventory plan so that it can support the sales plan. An inventory plan is created by a value plan and a unit plan, which are both composed of inventory and receipt targets. First, adjust the value plan. After you have adjusted the value plan, review the unit plan. The unit plan is essentially the value plan translated into units, based on the appropriate average unit retail (AUR). Because of this, the unit plan is affected by the changes you made to the value plan. If the value plan has created an unachievable unit plan, adjust both as necessary to meet your goals. The purpose of this step is to ensure that you have a receipt plan and an inventory plan that support the sales that you are projecting.

Use the following best practices to plan the receipts and inventory.

- Plan the receipt flow and then evaluate the average inventory and turn.
- Use the Gross Margin view to evaluate the gross margin created from your sales plan. Determine whether the planned gross margin meets your gross margin goal.

If it does not, gross margin can be updated by editing Wp Net Sales C or directly by updating Wp GM R or Wp GM R%.

Adjust the Wp Stock to Sales ratio C measure accordingly. These adjustments
affect the receipts for both the current month and prior month. However, the total
plan period receipts do not increase or decrease; they only shift from month to
month.

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la lanc ^a	31471	HEEN	12134611	102211	+62%3	33/54	104823	30et3	34,90.0	DONS	+8.57 W	+0.00	mmo	#1.00 A	42,04)8	0.013	100	38.24
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Figure 10–10 Update Receipts and Inventory Plan

After you have determined that the value and unit plans that you have created are achievable, continue to the "Review and Update Gross Margin Plan" step, where you can review the gross margin plan to see if your sales and inventory plans achieve the gross margin goal you have been given.

Review and Update Gross Margin Plan

Use the Review and Re-project Targets view to review the gross margin plans that were created by the value and unit plans you developed. You should use the Review and Re-project Targets view to determine whether the gross margin plans meet the gross margin goal that you have been given. If the gross margin plans do not meet your goal, make the necessary adjustments to your sales and inventory targets. Continue this process until you are satisfied with the gross margin plans.

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Figure 10–11 Review and Update Gross Margin Plan

Publish Targets

Use the Publish Targets tab under the In Season Review and Re-project step when you are ready to publish the targets you created (publish the updated targets). Publishing a target copies your Merch Target Wp measure information to the Tgt measures in your task, and then it commits those target measures to the database so that Merch Plan users can retrieve those targets.

The Tgt measures are shown in the Published Targets view found in the Publish Targets tab. These measures initially have existing targeted values. After the targets are published in this step, these measures are populated with the updated target information.

To publish the targets, complete the following steps.

- 1. Enable the Wp Publish Targets measure check box to select the halves the that you want to publish.
- **2.** If necessary, enter relevant information in the Wp Publish Notes measure. This is optional.
- 3. Repeat steps 1 and 2 for other locations and products if necessary.
- **4.** Click **Publish Targets**. This button is located in the top right corner, as shown in Figure 10–11.
- 5. A success message is displayed. Click **OK** to close it.

Figure 10–12 Success Message



6. The view refreshes and clears the data in Wp Publish Targets and Wp Publish Notes measures. It populates data for the Tgt Publish Info measure as name:date:Notes. The Tgt measures in this view are populated.

Figure 10–13 Publish View

Brick & Mortar - 500 Women		
	1 country	- 4
	Half1 FY2020	Half2 FY2020
Wp Publish Targets		
Wp Publish Notes		
Tgt Publish Info	adm : 16 Feb	adm : 16 Feb

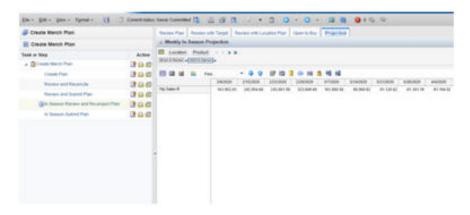
Figure 10–14 Tgt Measures View

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	-	Tgt Sales R	283,422.73	445,457.59	526,548.70	607,207.13	4
Review and Approve		Tgt Sales Reg+Promo R	283,422.73	445,457.59	526,548.70	607,207.13	4
In Season Review at	386	Tgt Sales Cir R	0.00	0.00	0.00	0.00	
	Conception of States	Tgt Net Sales R	158,716.73	249,456.27	294,867,26	340,036.02	24
		Tgt Net Sales Reg+Promo	158,716.73	249,456.27	294,867.26	340,036.02	24
		Tgt Net Sales Cir R	0.00	0.00	0.00	0.00	
		Tgt Markdown R %	12.6 %	12.7 %	12,4 %	12.6 %	
		Tgt Markdown R	19,941.47	31,730.00	36,637.15	42,679.04	3
		* Tgt Markdown Reg-Promo	19,941.47	31,730.00	36,637.15	42,679.04	3
		Tgt Markdown Cir R	0.00	0.00	0.00	0.00	
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		Tgt GM R %	40.0 %	39.5 %	39.8 %	39.6 %	
		Tgt BOP R	15,698,947	15,508,515	15,206,439	16,255,194	15,8
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		Tgt Shrink R	3,251,64	6,712.63	7,405.56	8.802.55	

Projection

The Projection view contains all the measures contained in the task; however, only the Wp Sales R measure is visible in the default measure profile. Use this task to create a view of task measures that you cannot view at one time in other views.

Figure 10–15 Weekly In-Season Projection



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

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

Review and Re-Project

After you have published your targets and committed your task, the Merch Plan user can use the targets to re-project the plan. The Merch Plan user can use the In Season Review and Re-project Plan task to review the plan and the targets created by the higher level users and determine how those plans compare to actuals.

Create

To build the In Season Review and Re-project Plan workbook, complete the following steps.

1. Click the **Create New Workbook** icon in the In Season Review and Re-project Plan task.

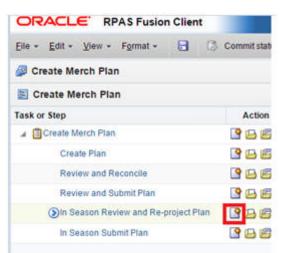


Figure 10–16 In-Season Review and Re-Project Plan

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

Figure 10–17 Workbook Wizard: Calendar Selection

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Available	Items						Selected	tems				
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3. The Location Selection step of the workbook wizard is displayed. Select the channels you want to plan and move them to the Selected Items box. Click **Next**.

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Select Cha	annel						Selected C	hannel						
Available	Items						Selected I	tems						
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Figure 10–18 Workbook Wizard: Channel Selection

4. The Product Selection step of the workbook wizard is displayed. Select the product you want to plan and move it to the Selected Items box. Click **Finish**.

Figure 10–19 Workbook Wizard: Product Selection

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The workbook is built, and the Review Plan view is visible. The In Season Review and Re-project Plan Task has the following tabs:

- Review Plan
- Review with Targets
- Review with Location Plan
- Open to Buy
- Projection

Review

Use the Review Plan to compare your plan to the current plan, the original plan, and last year's actuals. Use the three measure profiles in this view to complete these tasks: Wp/Ly, Wp/Cp, and Wp/Op.

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Figure 10–20 Review and Re-Project - Default Measure Profile View

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Figure 10–21 Review and Re-Project - Tgt with Cp Measure Profile View



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tig for large A	4.54.7	12.040	101144	10,01.0	arra	4554	4252	+11.7	482	1.013	7,411	1.01	10.017	NOT	goes.	23134	1.71	
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tig fact factor if our ligt fi	- 114	- 114	114	115	115	114	114	114		115	114	115	21%	114	114	-	- 14	•
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The next step for the planner is to review the plan with re-projected targets.

Review with Targets

After reviewing the plan, you must review the department targets that the Merch Targets user has created for you. In this way you can understand the goals that your plan should meet.

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Figure 10–23 Review with Targets

Use the Review with Target view under In Season Review and Re-project Plan step to adjust the sales and markdown, inventory, and gross margin for subclasses within a department by considering the targets that have been re-projected by the Merch Target role users.

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Figure 10–24 Update Sales, Markdowns, Inventory, and GM Measures

Review with Locations

Use these two measure profiles to compare your plan: Wp/LP/Cp and Wp/LPOp.

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Figure 10–25 Review with Location Plan, CP Value View

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Figure 10–26 Review with Location Plan, OP Value View

Review Open to Buy

Use the Open to Buy view to review your adjusted plan. The primary in-season task for the Merch Plan user is to review the OTB and adjust receipts if necessary. You can do this only if you have open to buy available. In the Review OTB step, you may have adjusted the OTB. Use this view to confirm that your updates can be obtained, given the OTB constraints you may have.

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Figure 10–27 Review Open to Buy

Review Projection

The Projection view contains all the measures contained in the task; however, only the Wp Sales R measure is visible in the default measure profile. Use this task to create a view of task measures that you cannot view at the same time in other views.

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Figure 10–28 Review Targets - All Measures

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

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

Submit/Approval

When you are ready to submit your working plan to the Merch Plan user for approval, use the Submit and Copy Approved Plan view in the In Season Submit Plan step. This step has two views: Submit and Copy Approved Plan and Submitted and Approved Plan.

Note that when you select the Op Approve Enabled measure, you can submit a plan for the Op version. This measure is set by an administrator in the Enable OP Approval administration task. The administrator can select or deselect this option at any time. If the administrator deselects it during the in-season, you cannot submit a plan for the Op. The administrator may choose to do this after the planning process has been finalized in order to lock down the Op. If this occurs, you will be unable to submit a plan for the Op and the Merch Targets user will be unable to approve a plan for the Op.

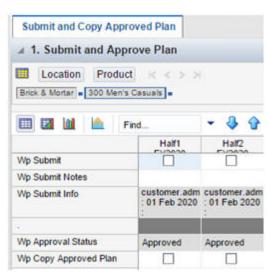


Figure 10–29 Submit and Copy Approved Plan

- **1.** Enable the Wp Submit measure check box for the select the halves the that you want to publish.
- **2.** Optional: Enter information about the working plan in the Wp Submit Notes measure.
- **3.** Click the **Submit** custom menu.
- 4. A success message is displayed. Click **OK** to close it.

Figure 10–30 Success Message

Custom Menu Response	0
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After the Submit custom menu is run, the Wp Submit and Wp Submit Info measures are cleared and the Wp Approval Pending check boxes are checked. The Wa Submit By, Wa Submit Date, and Wa Submit Info measures are populated. In addition, your working plan is copied into a Waiting for Approval (Wa) plan.

After the Merch Targets user approves or rejects the Wa plan, the Merch Plan user can see the approval or rejection information by accessing the Submit and Copy Approved Plan view in the Merch Plan - In Season Submit Plan step.

Submit and Copy Approved Plan # 1. Submit and Approve Plan Location Product K < > × Brick & Mortar = 300 Men's Casuals = - 3 9 🛄 🛃 📶 🖾 Find... Half1 Half2 Wp Submit Wp Submit Notes customer.adm customer.adm : 01 Feb 2020 : 01 Feb 2020 Wp Submit Info Wp Approval Status Submitted Submitted Wp Copy Approved Plan

Figure 10–31 In-Season Submit Plan

Once the planner submits the plan, the data is copied from the Wp measures to the Wa measures.

Figure 10–32 Submitted and Approved Plan View

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Next Steps

After you have submitted your plan to the Merch Targets user, the Merch Targets user approves or rejects your submitted plan. If the plan rejected, you can adjust it using the steps described in this chapter and submit it again.

Review Submitted

After the Merch Plan user submits a plan, the Merch Targets user can review the details of the plan in the Review Plan view under In Season Review and Re-project Targets step. This step has one view: Review Plan.

To build the In Season Review and Re-project Targets workbook, complete the following steps.

1. Click the **Create New Workbook** icon in the In Season Review and Re-project Targets task.

Create Merch Plan Targets

Create Merch Plan Targets

Task or Step

Action

Create Merch Plan Targets

Create Targets

Review and Publish Targets

Review and Approve Plan

In Season Review and Re-project Targe

Figure 10–33 Create New Workbook

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

Figure 10–34 Workbook Wizard: Calendar Selection

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3. The Location Selection step of the workbook wizard is displayed. Select the channels you want to plan and move them to the Selected Items box. Click **Next**.

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Available Items				Selected I	tems					
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Figure 10–35 Workbook Wizard: Location Selection

4. The Product Selection step of the workbook wizard is displayed. Select the product you want to plan and move it to the Selected Items box. Click **Finish**.

Figure 10–36 Workbook Wizard: Product Selection

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The workbook is built, and the Review and Re-project view is displayed.

Review

Merch Target user can review the details of the plan in the Review Plan view under the In Season Review and Re-project Targets step. This step has one view: Review Plan.

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Tgt Sales R	283,422.73	445,457.59	526,548.70	607,207,13	445,271.29	323,979.40	324,463.22	4
Wa Sales R	283,422.73	445,457.59	526,548.70	607,207.13	445,271.29	323,979.40	324,463.22	1
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Wa Net Sales R	158,716.73	249,456.27	294,867.26	340,036.02	244,899.12	178,188.68	178,454.74	
Tgt Net Sales R var Wa %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	
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Wa Markdown R	19,941.47	31,730.00	36,637.15	42,679.04	30,805,58	22,357.39	22,764.65	
Wa Markdown R %	12.6 %	12.7 %	12.4 %	12.6 %	12.6 %	12.5 %	12.8 %	
Tgt Markdown R var Wa %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	
- Tot BOP R	15.698.947	15.508.515	15.206.439	16,255,194	15.844,278	15.549.161	15.335,179	16
Wa BOP R	15.698.947	15.508.515	15,206,439	16.255.194	15.844.278	15.549.161	15,335,179	16.
Tgt Receipts R	0.00	0.00	1,404,019.37	0.00	0.00	0.00	1.535.898.38	
Wa Receipts R	0.00	0.00	1,404,019.37	0.00	0.00	0.00	1.535.898.38	
Tgt Receipts MU %	0.0 %	0.0 %	50.0 %	0.0 %	0.0 %	0.0 %	50.0 %	
Wa Receipts MU %	0.0 %	0.0 %	50.0 %	0.0 %	0.0 %	0.0 %	50.0 %	
Tgt Shrink R	3,251.64	6,712.63	7,405.56	8,802.55	5,933.67	3,937.96	4,207.04	
Wa Shrink R	3,251.64	6,712.63	7,405.56	8,802.55	5,933.67	3,937.96	4,207.04	
Tgt Move to Cir R	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Wa Move to Cir R	0.00	0.00	0.00	0.00	0.00	0.00	0.00	

Figure 10–37 Review Plan

You can use four measure profiles to review the plan: Default and Units.

After you have finished reviewing the Wa plan, continue to the last step of the task, Approve/Reject Plan. The Merch Target user can approve or reject the plan using Approve View.

- 1. In the Wp Approval measure, Select the Approved(or) Rejected option from the drop-down list.
- 2. Commit the data using the File menu (File > Commit).

After the Merch Targets user approves or rejects the Wa plan, the Merch Plan user can view the approval or rejection information by accessing the Submit and Copy Approved Plan view in the Merch Plan - In Season Submit Plan step.

Approve

Use Approve view in In Season Review and Re-project Targets step to re-approve the plan.

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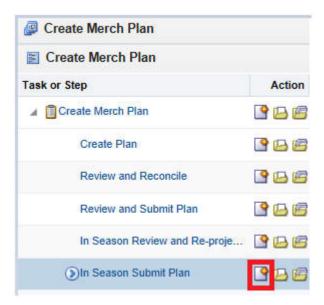
Figure 10–38 Approve

Build

To build the In Season Submit Plan workbook, complete the following steps.

1. Click the **Create New Workbook** icon in the In Season Submit Plan task.

Figure 10–39 Create New Workbook



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

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Figure 10–40 Workbook Wizard: Calendar Selection

3. The Location Selection step of the workbook wizard is displayed. Select the channels you want to plan and move them to the Selected Items box. Click **Next**.

Figure 10–41 Workbook Wizard: Location Selection

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4. The Product Selection step of the workbook wizard is displayed. Select the product you want to plan and move it to the Selected Items box. Click **Finish**.

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Figure 10–42 Workbook Wizard: Product Selection

Submit/Copy

This step has only one view, Submit and Copy Approved Plan View.

- 1. Verify the status of the Wp Approval Status measure.
- **2.** Enable the Wp Copy Approved Plan check box and run the Copy Approved Plan custom menu to approve the plan.

Figure 10–43 Submit and Approve Plan

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Once the planner re-approves the plan, the data is copied from the Wa measures to the Cp and Op measures.