Oracle® Retail Category Management

User Guide for the RPAS Fusion Client

Release 14.0

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Oracle Retail Category Management User Guide for the RPAS Fusion Client, Release 14.0

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Preface

This guide describes the Oracle Retail Category Management 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 Category Management. This includes merchandisers, buyers, business analysts, and administrative personnel.

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Related Documents

For more information, see the following documents in the Oracle Retail Category Management Release 14.0 documentation set:

- *Oracle Retail Batch Script Architecture Implementation Guide*

- *Oracle Retail Category Management Installation Guide*

- *Oracle Retail Category Management Implementation Guide*

- *Oracle Retail Category Management Release Notes*

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- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

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Improved Process for Oracle Retail Documentation Corrections

To more quickly address critical corrections to Oracle Retail documentation content, Oracle Retail documentation may be republished whenever a critical correction is needed. For critical corrections, the republication of an Oracle Retail document may at times not be attached to a numbered software release; instead, the Oracle Retail document will simply be replaced on the Oracle Technology Network Web site, or, in the case of Data Models, to the applicable My Oracle Support Documentation container where they reside.

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

An updated version of the applicable Oracle Retail document is indicated by Oracle part number, as well as print date (month and year). An updated version uses the same part number, with a higher-numbered suffix. For example, part number E123456-02 is an updated version of a document with part number E123456-01.

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

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

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

Conventions

The following text conventions are used in this document:

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

1

Introduction

Effective category management is the cornerstone of a successful retail business because it determines the variety and presentation of merchandise. This determination defines the customer's in-store experience. Category management involves managing individual product or merchandise categories as though they were independent business units, each playing a specific role in the retailer's goal to achieve their established business objectives. Broadly, this practice facilitates the determination of the following:

- Roles, strategies, and tactics and their designation into categories and sub-categories across the location hierarchy.

- Pricing and promotion strategies for different categories and sub-categories across the location hierarchy.

- Inventory-related decisions across categories and sub-categories across the retail chain.

- The retailer's standing in the market as compared to the competition.

- Key consumer segments contributing to the retailer's business and plan management of product categories as a result.

- Merchandise-mix or product-mix (also referred to as assortments) for a merchandise category (also known as class in Oracle Retail Merchandising System (RMS) terminology) and a sub-category (also known as sub-class in RMS terminology) across the retail chain - including the cluster and store level across the location hierarchy.

- Space-allocation at the micro and macro-level for different categories and sub-categories at the store and cluster level.

Oracle Retail Category Management (RCM) consists of the following tasks:

- Category Planning - Used for analyzing a retailer's business from a market, competition, and consumer perspective. Category Planning is used to set targets and assign roles, strategies, and tactics for individual product categories. Category Plans are created at the sub-category level.

- Assortment Planning Analysis - Used to analyze an assortment's historic performance from a market, competition, and consumer perspective.

- Assortment Planning @ Cluster - Used to create, analyze, adjust, and finalize Assortment Plans at the cluster level utilizing the concepts of Item Performance Index (IPI), Market Coverage, Incremental Curve, and Demand Transference.

- Assortment Planning @ Store - Used to create, adjust, review, and approve Assortment Plans at the store level utilizing the concepts of IPI and Demand Transference.

The Category Planning task enables the retailer to perform higher-level category planning activities and Assortment Planning tasks that facilitate the creation of SKU/Item-level Assortment Plans at the cluster and store level.

This solution supports the development of category business plans and assortment plans. It broadly follows the traditional eight-step Category Management business process with the inclusion of the consumer dimension in a few steps to provide the following:

- Analysis of market structure in terms of target shoppers/consumers and evaluation of trading area opportunity

- Performance analysis of individual product categories, based on various retail business parameters, as compared to the market in general and to the competition in particular

- Role assignment to individual product categories

- A blueprint for strategic and tactical action within a category and across categories

- The ability to analyze by consumer segments (sometimes called the ninth step in the Category Management business process)

- A structured, measured set of activities designed to produce specified output, that is, the development and implementation of a written category business plan

- Consumer insight, which is core to this application, brought in by utilizing external market and consumer data sourced from third-party syndicated data suppliers

Consumer segmentation and store clustering can be utilized to tailor assortments to specific markets and consumer segments by providing a profile mix of who is shopping the store and trading area. Store clusters are typically created for each product category in a trading area based upon similarity in consumers, stores, product attributes, sales profiles, and demographics so that assortments can be generated at the store cluster level. Assortments can also be generated at the store level.

Visibility into category roles, strategies, tactics, and financial objectives ensure that SKU/Item level assortments align back to overall category-level objectives.

Category Management Activities

The following Category Management activities and tasks are described in this guide:

- Category Management Planning activity:
  - Category Planning task

    For more information, see Chapter 4.
  - Assortment Planning Analysis

    For more information see Chapter 5.
  - Assortment Planning @ Cluster task

    For more information, see Chapter 6.
  - Assortment Planning @ Store

    For more information, see Chapter 7.
- Category Management Administration activity:
  - Category Management Administration

For more information, see Chapter 3.

- CDT Editor task

For more information, see Chapter 2.

Solution Task Flows

Figure 1–1 illustrates the flow of tasks for Category Planning.

Figure 1–1   Category Planning Task Flow
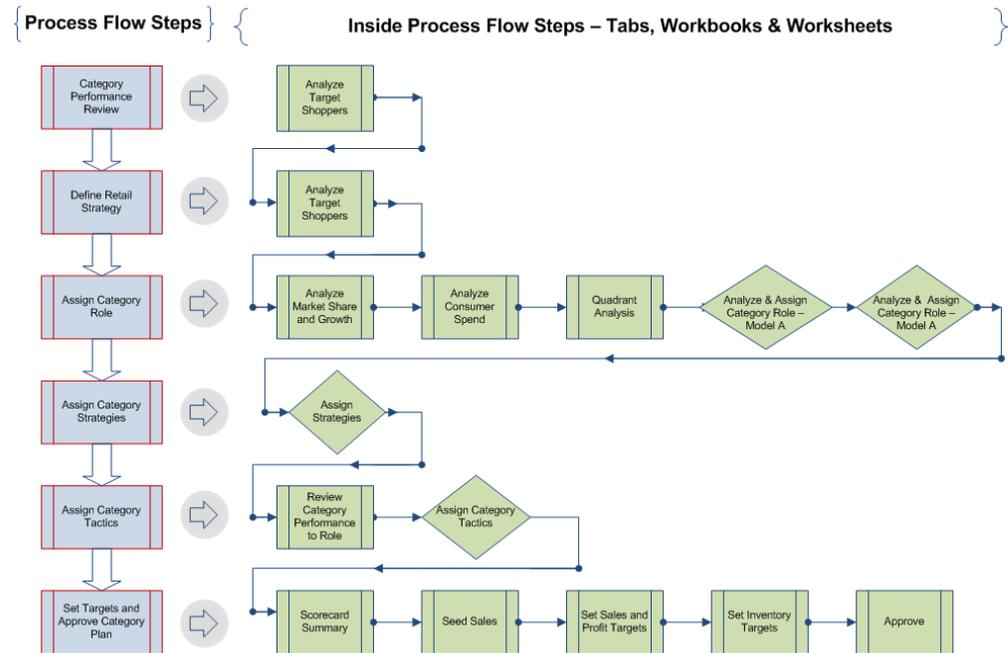
Figure 1–2 illustrates the flow of tasks for Assortment Planning Analysis.

Figure 1–2   Assortment Planning Analysis
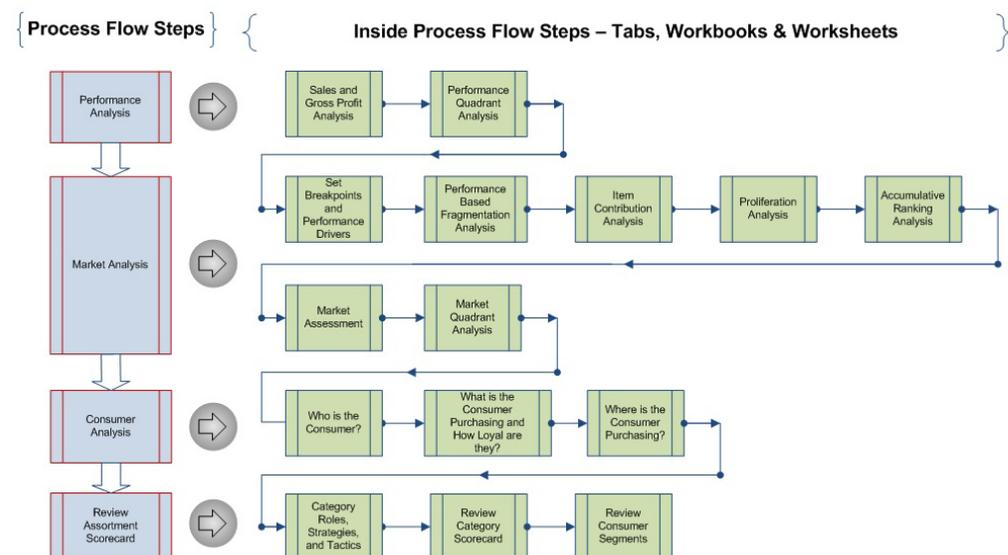
Figure 1–3 illustrates the flow of tasks for Assortment Planning @ Cluster.

Figure 1–3   Assortment Planning@ Cluster Task Flow
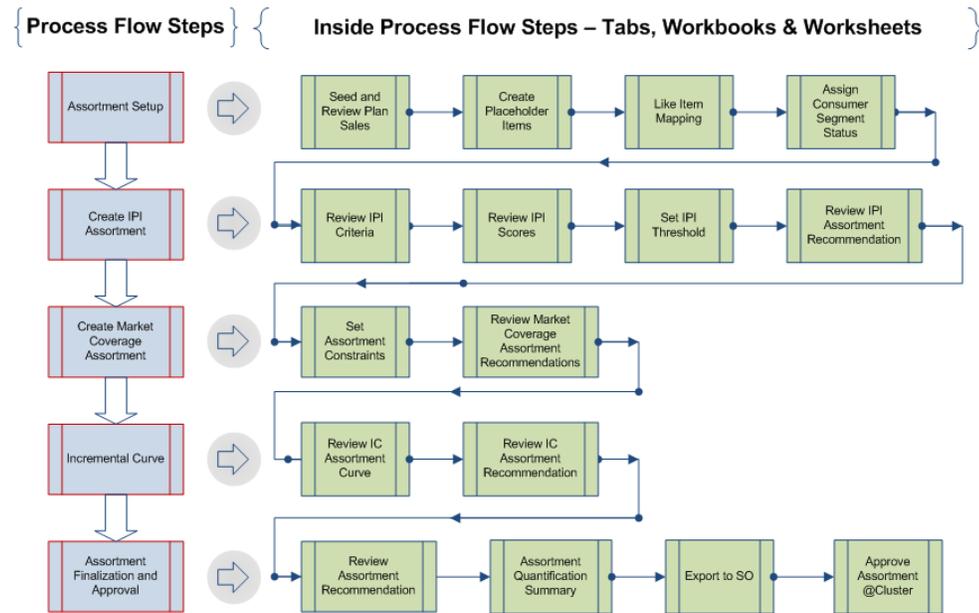
Figure 1–4 illustrates the flow of tasks for Assortment Planning @ Store.

Figure 1–4   Assortment Planning @ Store Task Flow
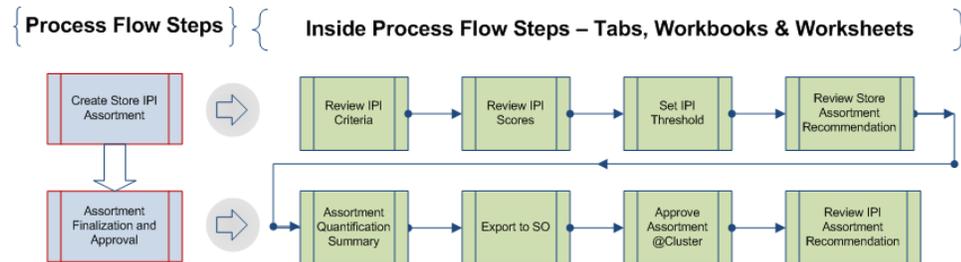
Integration with Oracle Retail Advanced Science Engine (ORASE)

The Category Management application is integrated with the Oracle Retail Advanced Science Engine (ORASE) and sources key information that is used in the Category Management process flow. Key integration points include the following:

1. **Import of Assortment Cluster Data:** Stores are grouped into Assortment Clusters or Clusters to be used to create Assortment Plans at the cluster level. ORASE and RCM share a common location hierarchy specifically in terms of Stores and Trading Area mapping. RCM sources assortment clusters in the form of .csv files from the Oracle Retail Modeling Engine (ORME) module, which is part of ORASE. Grouping of stores or Assortment Clustering in ORME is based on various parameters such as Consumer Segment Profiles, Store Attributes, Performance Attributes, Product Attributes, and so on.

2. **Import and Export of Product Attributes:** Product Attributes, or simply Attributes, consist of attribute names and attribute values at the SKU/Item level.

RCM sources attributes from ORME in the form of .csv files. RCM provides the facility to add and modify attribute values that map to SKUs/Items. There is an export facility available to communicate the changes to the Master Data Management system and to eventually reach ORME.

3. **Import of Consumer Decision Trees (CDTs):** CDTs are used to understand the consumer buying process and to identify key product attributes that influence consumer buying decisions from a consumer segment profile perspective. This ensures that key product attribute based products are present in the assortment. The CDT is expected to be in the form of a .XML file and use categories, trading areas, consumer segments, and attributes consistent with those found in RCM. CDTs are sourced from the ORME module of ORASE.

4. **Import of Demand Transference (DT) Data:** An Application Programming Interface (API) consisting of Java libraries is used to perform DT calculations in RCM. This API requires measures such as assortment elasticity for categories, similarity between SKUs/Items, DT-specific Attribute Weights, and Functional Fitment of attributes to categories. This information is sourced from the ORME module of ORASE in the form of .csv files.

5. **Export to ORASE:** RCM exports category plan, assortment plan and space management related information to the Oracle Retail Optimization Engine (OROE) module of ORASE. There are two types of exports provided to OROE:

    - An export with an assortment optimization request to OROE from a space management perspective

    - An update to OROE in the form of a final approved assortment and category plans for eventual implementation

Data Requirements in Category Management

The Category Management application has special data requirements that factor consumer-centricity and the retailer's market standing into the Category Management practice. A lot of this data is sourced from third-party syndicated data suppliers, also referred to as external market data providers. Examples of external market data providers include AC Nielsen, Symphony IRI, Axciom, and FICO.

Some of this data is also sourced internally from other applications such as Point-of-Sale (POS), Loyalty Card applications, Analytic Applications such as Retail Analytics, and so on.

All of this data is imported into Category Management as part of the implementation process or from time to time on an ad hoc basis. Table 1–1 describes the types of data entered and used for Category Management.

Table 1–1   Types of Data

Data	Description
Market Syndicated Data	Third-party syndicated data suppliers (or External Market Data Providers) have an agreement with most retailers (including both the retailer and their competitors) competing in the market to share their Point-of-Sale (POS) data with them.
	External Market Data Providers then combine and analyze this data to provide Market Syndicated Data with rich insights to the retailer. This data reflects most retailers as a whole and the retailer's standing in the market or a trading area.

Table 1–1 (Cont.) Types of Data

Data	Description
Household Panel Data	Also referred to Home-scan data. Third-party syndicated data suppliers (External Market Data Providers) collect this data from customers in the market by registering them for scanning their purchases from the retailers and sharing it with them. External Market Data Providers use this data to identify key patterns for different consumer segments. This provides a sample representation of the market for different trading areas with rich consumer profile or consumer segment information.
Market Basket Data	Market Basket refers to customer purchase data at the retailer. Customer purchases refers to market basket (or customer's basket or basket in general). The concept of Market Basket deals with analyzing the product (SKU) mix, number of baskets over a period of time, value of the basket bought, and category/sub-category contribution's in a customer's basket.
	Market Basket is a focus area in IPI calculations used to derive an Assortment Plan.
	This type of information provides insight into the halo/cannibalization effect of items that are purchased, which items are typically found in high basket rings, and so on.
Customer and Market Loyalty Data	Data supplied to retailers by syndicated data suppliers, such as Nielsen, Symphony IRI, or for hardlines, NPD. This type of data represents loyalty metrics associated with consumers within a particular trading area. That is, loyalty to a particular retailer.
	Market loyalty represents consumer loyalty within the market. Brand loyalty is an example of market loyalty data which represents the percent of the category dollar volume that is satisfied by the brand among brand buyers within a particular trading area.
Loyalty Card Data	Data captured through loyalty cards for a particular retailer. This is the retailer's internal data from its CRM applications. Retailers mine the data of their loyalty card holders for the purpose of understanding who their profitable customers are, what they buy, how often they buy, and which products and attributes they buy.
	Customer loyalty data is a useful component in Assortment Planning and the Category Management process, as retailers need to ensure that they are carrying products that appeal to their most profitable customers. This data is also referred to as frequent shopper data.

Required Data

This section lists all of the data that is required, along with its source, before a user can begin the category planning process

The following data is required for category planning:.

- Product categories fully defined for each vertical

- Products fully defined for each product category

- Consumer and customer segments defined for each vertical

- Trading areas defined

The data is acquired by importing the following:

- Store clusters

- Consumer decision trees (CDTs)

- Product hierarchies

- Location hierarchies

- Market scan data of the retailer

- Market scan data of the competition

- Retailer POS data

- Space performance data

- Retailer loyalty data

- Market basket data

Key Take Aways

Some worksheets include a Key Take Aways measure. A key take away is a free-form text field that enables the user to enter notes pertinent to a specific line-item in a worksheet.

- The notes can be anything the user wants to capture such as additional information (personal knowledge or supplier insight) used in the decision rationale or perhaps what led them to their final decision.

- Key take aways can be used for saving notes from findings from analytics.

- Key take aways can be used by the owner of a step to provide notes to other users who have lower privileges.

Roles

Roles can be defined by analyzing the part that each category plays for a retailer by trading area based on different Category Management frameworks. The Category Management framework provides insight into which categories are most strategic in the market, as well as which are most strategic for the retailer's target shoppers. This sets the foundation for understanding which categories should be assigned which roles within the retailer's portfolio.

Users are typically assigned to specific roles based on organizational structure.

> **Note:** Access to tasks is controlled by security permissions. If you do not have the permission to access a task, that task does not appear in your task list.

The following is an example list of roles:

- Administrator

- Executive

- Manager

- Planner

- Assortment Planner

- Category Planner

- Category Manager

Plan and Measure Versions

Multiple versions of plans are required in the application. Multiple plans require multiple measure versions of the same business parameter. The reasons for the requirement of multiple versions of plans and measures are:

- There are multiple persons on the Category Management team working on the same plan being created and used in different tasks like Category Planning, Assortment Planning @Cluster, and so on. These measures can exist in the application at different hierarchy levels to implement a more structured category management practice at the retailer. Examples: OP, Tgt, CP, WP.

- Plans are made at multiple levels (like assortment plans at cluster and store level).

- Plans with different time-dimensions need to be seen together for comparison. Example: LY/TY/LP.

- Measures are required to view science forecasts against the user made plan. Example: Fc.

The following is a list of plan and measure versions available in the application:

- AC - Assortment Planning @ Cluster

- AS - Assortment Planning @ Store

- CP - Current Plan

- DT - Demand Transference

- Fc - Forecast

- LP - Last Plan

- LY - Last Year

- OP - Original Plan

- Tgt - Target

- TY - This Year

- WP - Working Plan

Custom Menu Options

Custom menu buttons are located above the top right corner of the content area for some workbooks. Custom menus are specific to the steps available in different tasks. Within specific steps, you see custom menus that have been configured for use within that step. Custom menus are used run a batch or a special expression in the background that performs specific calculations, imports, exports, and so on, thereby activating a specific functionality in the app. Figure 1–5 shows an example from the and Like Item Mapping tab in the Assortment Setup step. Seed Sales and Seed Like Items are the two available custom menus.

Figure 1–5   Example of Custom Menu Options

Getting Started

Before using Category Management, be sure that you are familiar with how to access the application and use the Fusion Client user interface. If you need more information, see the *Oracle Retail Predictive Application Server User Guide for the Fusion Client*.

2

CDT Editor Task

Consumer Decision Trees (CDT), with their dynamic hierarchical structure, help retailers gain insight into the consumer decision process by analyzing and understanding the prioritization or importance of specific product attributes that ultimately determine the consumer's purchase. The output of a CDT is used to rationalize assortments for specific consumer segments. CDTs can be provided to Category Management through ORME or by the retailer.

The relationship between product segments in terms of perceived consumer importance is called the structure or decision tree of the category. The CDT structure provides attribute ranking, which measures the importance of each attribute to the consumer relative to the other attributes within the category. The decision process can vary for each consumer segment within the category, which in turn influences the importance of attributes variance per consumer segment.

Structure implies a hierarchical relationship among the segments. A consumer makes a specific judgment first (such as, what flavor do I want), then proceeds to the second most important decision (such as, what size?), and then proceeds to the third decision (such as, do I want a branded SKU or retail branded SKU?). Therefore, the structure of a category (the relationship between segments) can be thought of as a road map that consumers use to weed their way through the maze of segments and SKUs to arrive at a purchase decision.

Typically, the retailer can only store one hierarchy/decision tree. Since there are numerous consumers with varying decision tree processes, the process leverages the stored hierarchy, but enables the rationalization to accommodate multiple decision trees.

The following capabilities are supported:

- Viewing the assortment list by CDT.

- Viewing and comparing the differences between the current CDT and previous CDTs used at the time the assortment was created.

- Editing the current CDT.

For more information on viewing and editing the CDT, see the *Oracle Retail Predictive Application Server User Guide for the Fusion Client.*

This task has the following step:

- CDT Meta Data Step

Create the CDT Editor Workbook

To create the workbook:

1. Navigate to the **CatMan Administration** Activity.

2. Select the **New Workbook** icon in the CDT Editor task.

Figure 2–1   CDT Editor Task
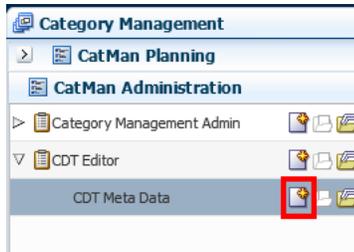
The workbook wizard opens.

3. Select the categories and move them to the Selected Items box. Click **Next**.

Figure 2–2   Workbook Wizard Select Category Page
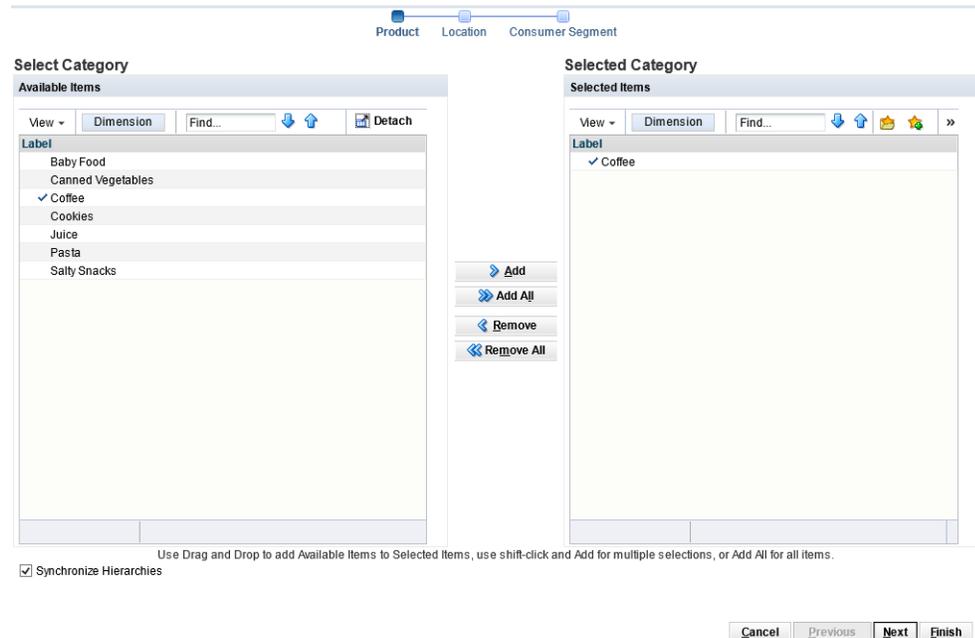
4. Select the Trading Areas and move them to the Selected Items box. **Click Next**.

Figure 2–3   Workbook Wizard Select Trading Area Page

5. Select the consumer segments and move them to the Selected Items box. Click **Finish**.

Figure 2–4   Workbook Wizard Select Consumer Segment Page

The workbook is created.

CDT Meta Data Step

This step has one view. Use this view to review and make changes to the CDT.

Figure 2–5   CDT Meta Data View
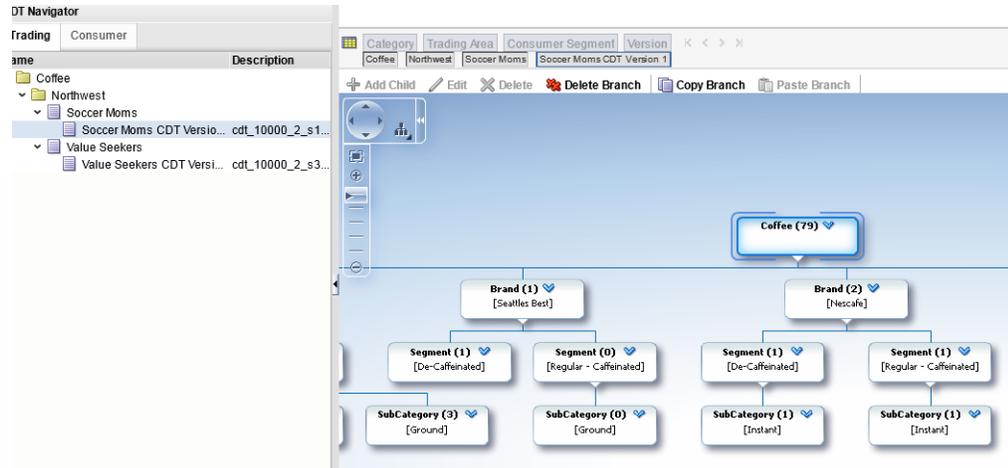
Next Steps

After all CDT edits are made, commit the workbook.

Custom Menu

The CDT Editor workbook has a custom menu available called Accept XML. Acceptance of the XML is necessary for the changes made in the CDT Editor to be visible in the rest of the product. The custom menu processes all new and modified CDTs. This processing sets up the dynamic hierarchies that are used in the views in the CatMan Administration task.

After the Accept XML custom menu has been run, the CDT needs to be enabled in the domain. For more information, see "Select CDT Version Step" in Chapter 3.

3

Category Management Administration Task

The Category Management Administration task is used to define the corporate guidelines and data required for assessment and optimization. It has steps and views that mirror the Category Management workflow. Each view requires the entry of corporate level data. As such, an administrator would manage and maintain this workbook.

All other administrative parameters are set in this Administration activity. For more information, see the *Oracle Retail Predictive Application Server Administration Guide for the Fusion Client*.

This task has the following steps:

- Select CDT Version Step
- Attribute Definitions Step
- IPI Setup Step
- Consumer Segment Step
- Set Default Tactics Step
- Calendar Mapping Step
- Assign DT SKU Cutoff Step

Create the Category Management Admin Workbook

To create the workbook:

1. Select the **New Workbook** icon in the Category Management Admin task.

Figure 3–1   Category Management Admin Task
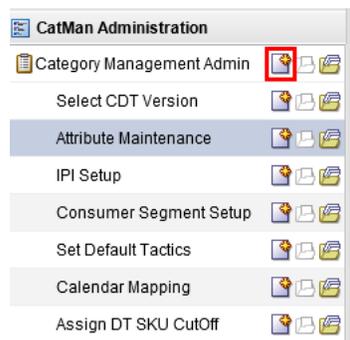
The workbook is created.

Select CDT Version Step

This step has one view. Use this view to select the CDT versions that are available in the workbook. A CDT version must be enabled here before it can be used elsewhere in the application.

Figure 3–2   Select CDT Version View
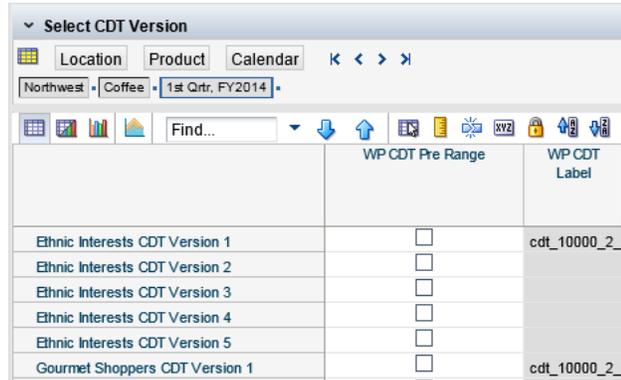
Table 3–1 lists the measures available in this view.

Table 3–1   Select CDT Version Measure

Label	Definition
WP CDT Pre Range	Administrator Working Plan CDT Pre Range Boolean.
WP CDT Label	CDT Editor Working Plan CDT Label Text.

Attribute Definitions Step

This step has three views:

- Attribute Value Maintenance View
- Category Attribute Mapping View
- SKU Attribute Maintenance View

Attribute Value Maintenance View

Use the Attribute Value Maintenance view to maintain Product Attribute Values mapping to Product Attribute Names, commonly known as Attribute Names. Product Attributes, in general, refer to both Attribute Names and Attribute Values.

Figure 3–3 Attribute Value Maintenance View
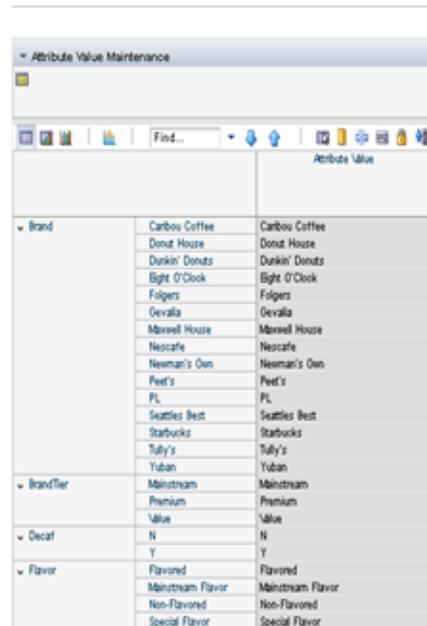
Table 3–2 lists the measure available in this view.

Table 3–2 Attribute Value Maintenance Measure

Label	Definition
Attribute Value	Indicates whether or not the attribute value applies to a class - both Boolean and Text values.

Category Attribute Mapping View

Use the Category Attribute Mapping view to maintain the mapping of Attribute Names to a Product Category.

Figure 3–4 Category Attribute Mapping View
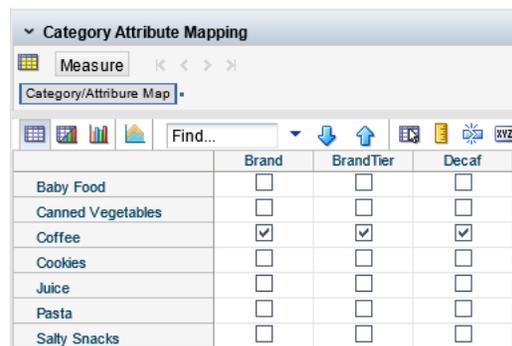
Table 3–3 lists the measure available in this view.

Table 3–3 Category Attribute Mapping Measure

Label	Definition
Category/Attribute Map	This measure stores the mapping of Attribute Names to a Category.

SKU Attribute Maintenance View

Use the SKU Attribute Maintenance view to maintain Attribute Values mapping to a SKU or item.

Figure 3–5   SKU Attribute Maintenance View

Table 3–4 lists the measure available in this view.

Table 3–4   SKU Attribute Maintenance Measure

Label	Definition
WP Attribute Value	Indicates if the attribute value applies to a class - both Boolean and Text values.

IPI Setup Step

The weights set in the IPI Setup step are used to pre-populate the IPI weights which are used in the Assortment Planning @ Cluster task. They can then be overridden by the Category Manager to achieve category-specific objectives. These weights are pre-populated using retail industry best practices, and may be updated to match a specific retailer's process at the time of implementation.

This step contains five views:

- Assign Attribute Name Weights View

- Assign Attribute Value Weights View

- Assign Consumer Segment Weights View

- Assign Focus Area Weights View

- Assign Metric Weights View

Assign Attribute Name Weights View

Use the Assign Attribute Name Weights view to set the weights for the product attribute names to be used in the SKU's/Item's IPI score calculations. The weights should add up to 100%. Assigned weights add emphasis to those attributes for consideration in the IPI calculation.

Figure 3–6   Assign Attribute Name Weights View

Table 3–5 lists the measure available in this view.

Table 3–5   Assign Attribute Name Weights Measure

Label	Definition
Attribute Name Weight	The percentage of weightage assigned for the attribute names' IPI calculations.

Assign Attribute Value Weights View

Use the Assign Attribute Value Weights view to set the weights for the product's attribute values to be used in a SKU's/Item's IPI score calculations. Increasing or decreasing the value for an Attribute Value Weight increases or decreases the IPI score for items with that attribute value. The average Attribute Value Weight score should equal 1.00.

Figure 3–7   Assign Attribute Value Weights View

Table 3–6 lists the measure available in this view.

Table 3–6   Assign Attribute Value Weight Measure

Label	Definition
Attribute Value Weight	The percentage of weightage assigned for the attribute values' IPI calculations.

Assign Consumer Segment Weights View

Use the Assign Consumer Segment Weights view to set weights for different consumer segments buying at the retailer in the market. These consumer segment weights are then used in the SKU's/Item's IPI score calculations. These weights should add up to 100%.

Figure 3–8   Assign Consumer Segment Weights View

Table 3–7 lists the measure available in this view.

Table 3–7   Assign Consumer Segment Weights Measure

Label	Definition
Consumer Seg Weight	Assortment Planning @ Cluster Working Plan Consumer Segment Weight Value.

Assign Focus Area Weights View

Use the Assign Focus Area Weights view to set weights for focus areas, which are used in the SKU's/Item's IPI score calculations. These weights should add up to 100%.

Figure 3–9   Assign Focus Area Weights View

Table 3–8 lists the measure available in this view.

Table 3–8   Assign Focus Area Weights Measure

Label	Definition
Focus Area Weight	Assortment Planning @ Cluster Working Plan Focus Area Weight Value. The weightage assigned to individual focus areas for a particular product category.

Assign Metric Weights View

Use the Assign Metric Weights view to set the mix of weights for different retail metrics or measures to be used for a SKU's/Item's IPI score calculations. These weights should add up to 100%.

Figure 3–10   Assign Metric Weights View

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

Table 3–9   Assign Metric Weights Measures

Label	Definition
Sales R Weight	The percentage of weightage given to the sales retail metric for individual focus areas in IPI calculations for any category.
Sales U Weight	The percentage of weightage given to the sales unit metric for individual focus areas in IPI calculations for any category.
Gross Profit Weight	Administrator Default Value Gross Profit Weight Value.
Gross Profit % Weight	Administrator Default Value Gross Profit % Weight Value.
Exclusivity Weight	Administrator Default Value Exclusivity Weight Value. The weightage assigned to individual focus areas keeping in mind their exclusivity.
Loyalty Weight	Administrator Default Value Loyalty Weight Value. The weightage assigned to individual focus areas based on the loyalty associated with them.
Switching Weight	Administrator Default Value Switching Weight Value.
Worth Weight	Assortment Planning @ Cluster Working Plan Worth Weight Value.

Consumer Segment Step

This step contains two views:

- Assign Consumer Segment Distribution View
- Assign Consumer Segment Status View

Assign Consumer Segment Distribution View

Use the Assign Consumer Segment Distribution view to see the contribution of individual consumer segments to the overall sales at the retailer for different product categories in the past. It is represented in the form of Consumer Segment Distribution.

Figure 3–11   Assign Consumer Segment Distribution View

Table 3–10 lists the measure available in this view.

Table 3–10   Assign Consumer Segment Distribution Measure

Label	Definition
Consumer Seg Distribution	Administrator Default Value Consumer Segment Distribution Value. The percentage of consumers who belong to a given consumer segment for a given store cluster.

Assign Consumer Segment Status View

Use the Assign Consumer Segment Status view to review the consumer segment distribution in a market (trading area) and see the respective contribution to retailer's business.

Figure 3–12   Assign Consumer Segment Status View

Table 3–11 lists the measure available in this view.

Table 3–11   Assign Consumer Segment Status Measure

Label	Definition
WP Consumer Seg Status	The status of a consumer segment; Primary, Secondary, and so on.

Set Default Tactics Step

The Set Default Tactics step has two views:

■ Set Default Tactics View

■ Space Related Tactics View

Use these views to assign tactics for each tactical area:

■ Assortment

■ Inventory

■ Pricing

■ Promotion

■ Space

Entries made in this table are used to populate many of the drop-down lists that are used in Category Planning.

Set Default Tactics View

Use the Set Default Tactics view to maintain the superset of tactics (tactics values) for a retail business tactical area such as Assortment, Pricing, Space, and so on. Tactics are the possible approaches suggested in the category plan for a specific tactical area. For example, in the area of Assortment, tactic values could be expand the assortment or increase PL (private labels). Tactics are assigned at the sub-category level in a category plan. This is done to maintain alignment to actions required at the sub-category level as per the role and strategy assigned to achieve the business targets at the category level. Roles, Strategies, and Tactics are part of the category plan.

Figure 3–13   Set Default Tactics View

Table 3–12 lists the measure available in this view.

Table 3–12   Set Default Tactics Measure

Label	Definition
Wp Tactic Values	Administrator Working Plan Tactic Values Boolean and Text. Tactics are the suggested actions in a tactical area like Assortment, Pricing, Space, and so on, at the sub-category level in alignment with Role and Strategy for a category to meet the business targets.

Space Related Tactics View

Use the Space Related Tactics view to set the tactics information to be sent to the Oracle Retail Optimization Engine (OROE) module of ORASE (Oracle Retail Advanced Science Engine) and Space Management systems Macro Space Management (MSM).

Figure 3–14   Space Related Tactics View
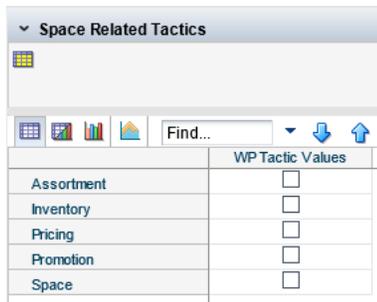
Table 3–13 lists the measure available in this view.

Table 3–13   Space Related Tactics Measure

Label	Definition
Wp Tactic Values	Administrator Working Plan Tactic Values Boolean and Text.

Calendar Mapping Step

This step has two views:, Quarter Mapping and Week Mapping.

- Quarter Mapping View

- Week Mapping View

Use these views to assign and validate the last year quarter or week mapping. By default, the loaded file maps the last year as the same quarter or week last year. The mapping for any quarter or week can be reassigned in this workbook.

Quarter Mapping View

Use this view to assign and validate the last year quarter mapping. By default, the loaded file maps the last year as the same quarter last year. The mapping for any quarter can be reassigned in this workbook.

Figure 3–15   Quarter Mapping View

Table 3–14 lists the measure available in this view.

Table 3–14   Quarter Mapping Measure

Label	Definition
LY Quarter Mapping	Administrator Last Year Quarter Mapping Text. Identifies the quarter used for mapping as last year.

Week Mapping View

Use this view to assign and validate the last year week mapping. By default, the loaded file maps the last year as the same week last year. The mapping for any week can be reassigned in this workbook.

Figure 3–16   Week Mapping View

Table 3-15 lists the measures available in this view.

Table 3–15   Week Mapping Measures

Label	Definition
Week Position	Administrator Default Value Week Position Text.
LY Week Mapping	Identifies the week used for mapping as last year.

Assign DT SKU Cutoff Step

This step has one view.

Assign DT SKU CutOff View

Use this view to define DT SKU CutOff %, which is used when applying Demand Transference to an assortment to calculate the No. of Significant Substitute SKUs for the Substitutable Demand from a SKU to its Substitute SKUs. Refer to the definition of Assign DT SKU CutOff % for more details.

Figure 3–17   Assign DT SKU Cutoff View

Table 3–16 lists the measure available in this view.

Table 3–16   Assign DT SKU Cutoff Measure

Label	Definition
Assign DT SKU Cutoff %	Refers to the chunk of (percentage of) substitutable demand of a parent SKU, the user wants to see in the app or in the worksheets (Review Assortment type and Review DT Details). This threshold value is defined as percentage of Substitutable Demand (Substitutable Demand Sales). The No. of Significant Substitute SKUs is calculated on the basis of DT SKU Cut-Off %. It can be defined at the sub-category or trading area level. The reason or requirement of this measure comes from the fact that substitutable sales that get transferred to substitute SKUs have a tapering effect on a threshold value and looking into the details of the insignificant substitutable demand's distribution is not desired.

Next Steps

After completing all of the Category Management Administration steps, commit the workbook. Continue to the Category Management Planning Activity.

4

Category Planning Task

There are six steps under the Category Planning task and each step contributes to the final category plan being derived from this task. The objective is to view and analyze information from diverse sources such as Syndicated Market Data, Syndicated Household Panel Data, retailer's actuals and forecast data, Loyalty Card Data, and so on. RCM uses this information to drive the review, creation and approval of category plans. Category Plans consist of sub-category level targets in the form of various retail business measures such as Sales, Gross Profit, Inventory Level, Private Label specific, Promo specific, and so on, and an assignment of roles, strategies and tactics for categories and sub-categories.

This task has the following steps:

- Category Performance Review Step
- Define Retail Strategy Step
- Assign Category Role Step
- Assign Category Strategies Step
- Assign Category Tactics Step
- Set Targets and Approve Category Plan Step

Create the Category Planning Workbook

To create the workbook:

1. Select the New Workbook icon in the Category Planning task.

Figure 4–1   Category Planning Task

The workbook wizard opens.

2. Select one location and move it to the Selected Items box. Click **Next**.

Figure 4–2   Workbook Wizard Select Location Page
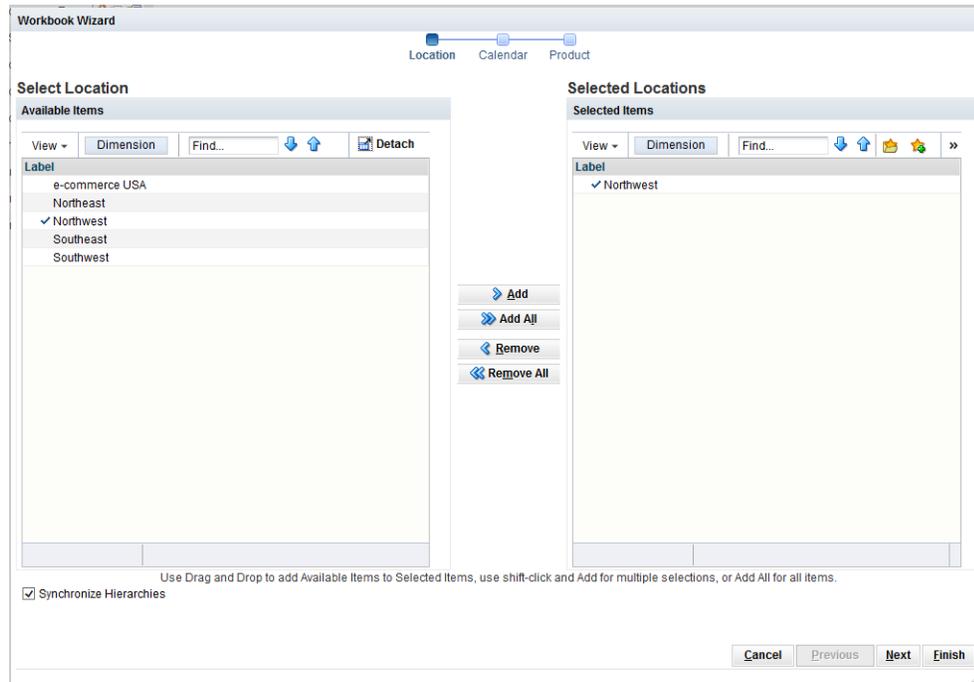
3.   Select the calendar periods and move them to the Selected Items box. Click **Next.**

Figure 4–3   Workbook Wizard Select Periods Page
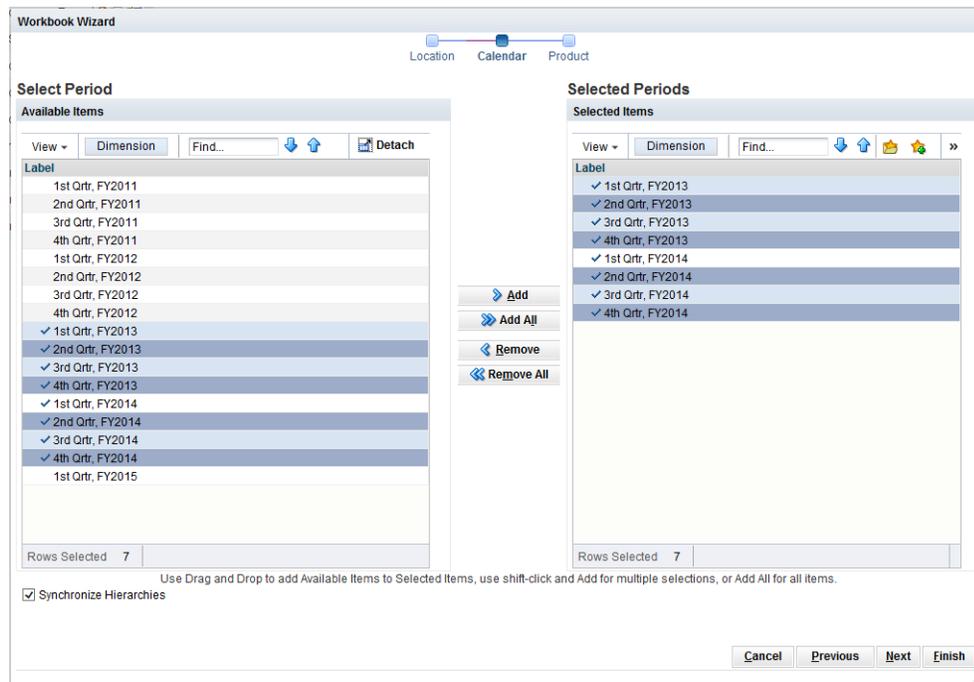
4.   Select the categories and move them to the Selected Items box. Click Finish.

Figure 4–4   Workbook Wizard Select Category Page
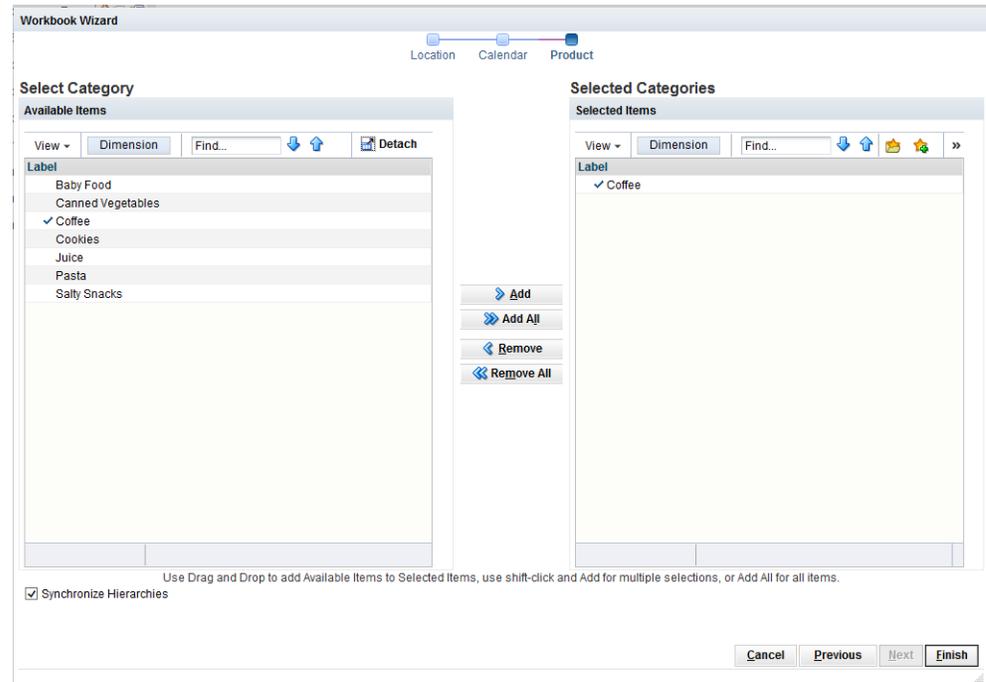
The workbook is created.

Category Performance Review Step

The Category Performance Review Step is a dashboard view for the user to assess the performance of a category and sub-category against the targets set for the approved category plan. This comparison is made during the in-season for the current planning period and during the pre-season for past planning periods.

Scorecard Summary View

This step has one view, Scorecard Summary. Use this view to assess the performance categories and respective sub-categories.

The Scorecard Summary view also contains three measure profiles for basic retail parameters like Sales, Gross Profit, and so on:

- Sales

- Promo Sales

- Private Label Sales

Figure 4–5   Scorecard Summary Sales Measure Profile View

Table 4–1 lists the measures available in the Scorecard Summary Sales Measure Profile View.

Table 4–1   Scorecard Summary Sales Measure Profile Measures

Label	Definition
LY Sales R	Category Planning and Assortment Planning @ Cluster. Last Year's Promo Sales Retail. Last year sales revenue due to a promotion for the item obtained from a third party. The data is typically obtained quarterly.
WP Sales R	Assortment Planning @ Cluster and Category Planning Working Plan Sales Retail. The current planned sales retail for the item.
WP Sales var to LY R	Assortment Planning @ Cluster and Category Planning Working Plan Sales variance to Last Year Retail.
OP Sales R	The Pre-Season planned sales revenue for the item.
OP Sales var to LY R	Assortment Planning @ Cluster and Category Planning Original Plan Promo Sales variance to Last Year Retail.
LY Gross Profit R	Assortment Planning @ Cluster and Category Planning Last Year Gross Profit Retail. Last year's Retail Sales minus Last Year's Cost of Goods Sold.
LY Gross Profit %	Category Planning and Assortment Planning @ Cluster Last Year Gross Profit Percent. Last year's Retail Sales minus Last Year's Cost of Goods Sold divided by Last Year's Retail Sales.
WP Gross Profit R	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit Retail. Used only in IPI calculations. The current Retail Sales minus Last Year's Cost of Goods Sold.
WP Gross Profit %	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit Percent. Current approved Retail Sales minus Cost of Goods Sold divided by Retail Sales.

Table 4–1   (Cont.) Scorecard Summary Sales Measure Profile Measures

Label	Definition
WP Gross Profit var to LY	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit variance to Last Year Retail.
OP Gross Profit R	Category Planning and Assortment Planning @ Cluster Original Plan Gross Profit Retail The Pre-Season Planned Retail Sales minus Last Year's Cost of Goods Sold.
OP Gross Profit %	Assortment Planning @ Cluster Original Plan Private Label Gross Profit Percent. Pre-Season approved Retail Sales minus Cost of Goods Sold divided by Retail Sales.
OP Gross Profit var to LY	Category Planning Original Plan Gross Profit variance to Last Year Retail.
LY Avg Inv R	Category Planning and Assortment Planning @ Cluster Last Year Average Inventory Retail.
WP Avg Inv R	Category Planning and Assortment Planning @ Cluster Working Plan Average Inventory Retail.
OP Avg Inv R	Assortment Planning @ Cluster and Category Planning Original Plan Average Inventory Retail.
LY Turn	Category Planning and Assortment Planning @ Cluster Last Year Turn Retail Ratio.
WP Turn	Assortment Planning @ Cluster and Category Planning Working Plan Turn Retail Ratio. The current planned number of times a retailer expects to sell out of its complete inventory in a given period of time..
OP Turn	Category Planning and Assortment Planning @ Cluster Original Plan Turn Retail Ratio. The Pre-Season approved number of times a retailer expects to sell out of its complete inventory in a given period of time.

Figure 4–6   Scorecard Summary Promo Sales Measure Profile View

Table 4–2 lists the measures available in the Promo Sales Measure Profile View.

Table 4–2   Scorecard Summary Promo Sales Measure Profile Measures

Label	Definition
LY Sales R	Category Planning and Assortment Planning @ Cluster. Last Year Promo Sales Retail. Last year sales revenue due to a promotion for the item obtained from a third party. The data is typically obtained quarterly.
WP Sales R	Assortment Planning @ Cluster and Category Planning Working Plan Sales Retail. The current planned sales revenue for the item.
WP Sales var to LY R	Assortment Planning @ Cluster and Category Planning Working Plan Sales variance to Last Year Retail.
OP Sales R	The Pre-Season planned sales revenue for the item.
OP Sales var to LY R	Assortment Planning @ Cluster and Category Planning Original Plan Promo Sales variance to Last Year Retail.
LY Promo Sales R	Last year sales revenue due to a promotion for the item obtained from a third party. The data is typically obtained quarterly.
LY Promo Sales contrib to LY	Assortment Planning @ Cluster and Category Planning Last Year Promo Sales contribution to Last Year Retail.
Wp Promo Sales R	Current approved Promotional sales revenue for the item obtained from a third party. The data is typically obtained quarterly.
WP Promo Sales contrib to WP Sales R	Represents the contribution to promotional sales by an item (or a product dimension) to the overall sales value/revenue.
WP Promo Sales var to LY R	Category Planning and Assortment Planning @ Cluster Working Plan Promo Sales variance to Last Year Retail.
OP Promo Sales R	Pre-Season planned sales revenue for the item obtained from a third party. The data is typically obtained quarterly.
OP Promo Sales contrib to OP Sales R	Category Planning and Assortment Planning @ Cluster Original Plan Promo Sales contribution to Original Plan Retail.
OP Promo Sales var to LY R	Category Planning and Assortment Planning @ Cluster Original Plan Private Label Sales variance to Last Year Retail.
LY Gross Profit R	Assortment Planning @ Cluster and Category Planning Last Year Gross Profit Retail. Last year's Retail Sales minus Last Year's Cost of Goods Sold.
LY Gross Profit %	Category Planning and Assortment Planning @ Cluster Last Year Gross Profit Percent. Last year's Retail Sales minus Last Year's Cost of Goods Sold divided by Last Year's Retail Sales.
WP Gross Profit R	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit Retail. Used only in PIP calculations. The current Retail Sales minus Last Year's Cost of Goods Sold.
WP Gross Profit %	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit Percent. Current approved Retail Sales minus Cost of Goods Sold divided by Retail Sales.
WP Gross Profit var to LY R	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit variance to Last Year Retail.
OP Gross Profit R	Category Planning and Assortment Planning @ Cluster Original Plan Gross Profit Retail The Pre-Season Planned Retail Sales minus Last Year's Cost of Goods Sold.

Table 4–2 (Cont.) Scorecard Summary Promo Sales Measure Profile Measures

Label	Definition
OP Gross Profit %	Assortment Planning @ Cluster Original Plan Private Label Gross Profit Percent. Pre-Season approved Retail Sales minus Cost of Goods Sold divided by Retail Sales.
OP Gross Profit var to LY	Category Planning Original Plan Gross Profit variance to Last Year Retail.

Figure 4–7 Scorecard Summary Private Label Measure Profile View

Table 4–7 lists the measures available in the Private Label Measure Profile View.

Table 4–3   Scorecard Summary Private Label Measure Profile Measures

Label	Definition
LY Sales R	Category Planning and Assortment Planning @ Cluster. Last Year Promo Sales Retail. Last year sales revenue due to a promotion for the item obtained from a third party. The data is typically obtained quarterly.
WP Sales R	Assortment Planning @ Cluster and Category Planning Working Plan Sales Retail. The current planned sales revenue for the item.
WP Sales var to LY R	Assortment Planning @ Cluster and Category Planning Working Plan Sales variance to Last Year Retail.
OP Sales R	The Pre-Season planned sales revenue for the item.

Table 4–3   (Cont.) Scorecard Summary Private Label Measure Profile Measures

Label	Definition
OP Sales var to LY R	Assortment Planning @ Cluster and Category Planning Original Plan Promo Sales variance to Last Year Retail.
LY Private Label Sales R	Assortment Planning @ Cluster and Category Planning Last Year Private Label Sales Retail. The Sales dollars for the retailer brand during the last fiscal year.
LY Private Label Sales contrib to LY R	Category Planning and Assortment Planning @ Cluster Last Year Promo Sales contribution to Last Year Retail.
Wp Private Label Sales R	Category Planning Working Plan Private Label Sales Retail. The current planned retailer brand sales average unit's retail for the item.
WP Private Label Sales contrib to WP Sales R	Category Planning and Assortment Planning @ Cluster Working Plan Private Label Sales contribution to Working Plan Sales Retail.
WP Private Label Sales var to LY R	Category Planning and Assortment Planning @ Cluster Working Plan Private Label Sales variance to Last Year Retail.
OP Private Label Sales R	Category Planning and Assortment Planning @ Cluster Original Plan Private Label Sales Retail. Pre-Season planned sales revenue for the retailer brand obtained from a third party. The data is typically obtained quarterly.
OP Private Label Sales contrib to OP Sales R	Category Planning and Assortment Planning @ Cluster Original Plan Promo Sales contribution to Original Plan Retail.
OP Private Label Sales var to LY R	Category Planning and Assortment Planning @ Cluster Original Plan Private Label Sales variance to Last Year Retail.
LY Gross Profit R	Assortment Planning @ Cluster and Category Planning Last Year Gross Profit Retail. Last year's Retail Sales minus Last Year's Cost of Goods Sold.
LY Gross Profit %	Category Planning and Assortment Planning @ Cluster Last Year Gross Profit Percent. Last year's Retail Sales minus Last Year's Cost of Goods Sold divided by Last Year's Retail Sales.
WP Gross Profit R	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit Retail. Used only in IPI calculations. The current Retail Sales minus Last Year's Cost of Goods Sold.
WP Gross Profit %	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit Percent. Current approved Retail Sales minus Cost of Goods Sold divided by Retail Sales.
WP Gross Profit var to LY R	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit variance to Last Year Retail.
OP Gross Profit R	Category Planning and Assortment Planning @ Cluster Original Plan Gross Profit Retail The Pre-Season Planned Retail Sales minus Last Year's Cost of Goods Sold.
OP Gross Profit %	Assortment Planning @ Cluster Original Plan Private Label Gross Profit Percent. Pre-Season approved Retail Sales minus Cost of Goods Sold divided by Retail Sales.
OP Gross Profit var to LY	Category Planning Original Plan Gross Profit variance to Last Year Retail.

Define Retail Strategy Step

Retailers need to view and analyze information from diverse sources and use that information to analyze target shoppers, trading area opportunities, and the

competition. Category planning is used to define the retailer's strategy and determine how to allocate category roles while aligning resources to opportunities. The retail strategy should answer the following questions:

- Who are the retailer's target shoppers and is the retailer reaching them?

- Why are the target shoppers a total store opportunity for the retailer?

- Who are the retailer's competitors for the target shopper?

- What opportunities exist to improve the retailer's competitive position?

- Which categories are most strategic in the market and for the retailer?

- How should the retailer allocate category roles and resources while aligning resources to opportunities?

The following data is required for this task:

- Store clusters.

- Predefined consumer segments.

- Predefine trading areas.

- Imported consumer decision trees in XML format.

- Imported forecast from Oracle Retail Demand Forecasting (RDF).

- Imported POS data from the retailer.

- Analysis based on Household Panel data received from external sources, such as Nielsen or Symphony IRI.

- All external data precomputed or aggregated and not required to be recomputed within Category Planning.

This step has the following views:

- Analyze Target Shoppers View

- Analyze Trading Area Opportunity View

- Analyze Competition View

Analyze Target Shoppers View

Use this view to analyze target shoppers. This analytic provides insight into whether or not the retailer is stronger compared to the total market with respect to a particular consumer demographic group:

- Composition of the consumers shopping at the retailer as compared to the overall market.

- What percentage of the total spend in that market is from each of the demographic groups.

The view exists at the following levels:

- Consumer Profile (the base level in the Consumer Profile dimension) such as household income or number of children

- Trading Area (a level in the Location dimension) such as Chicago or Atlanta

- Category (a level in the Product dimension) such as cereal or coffee

Figure 4–8   Analyze Target Shoppers
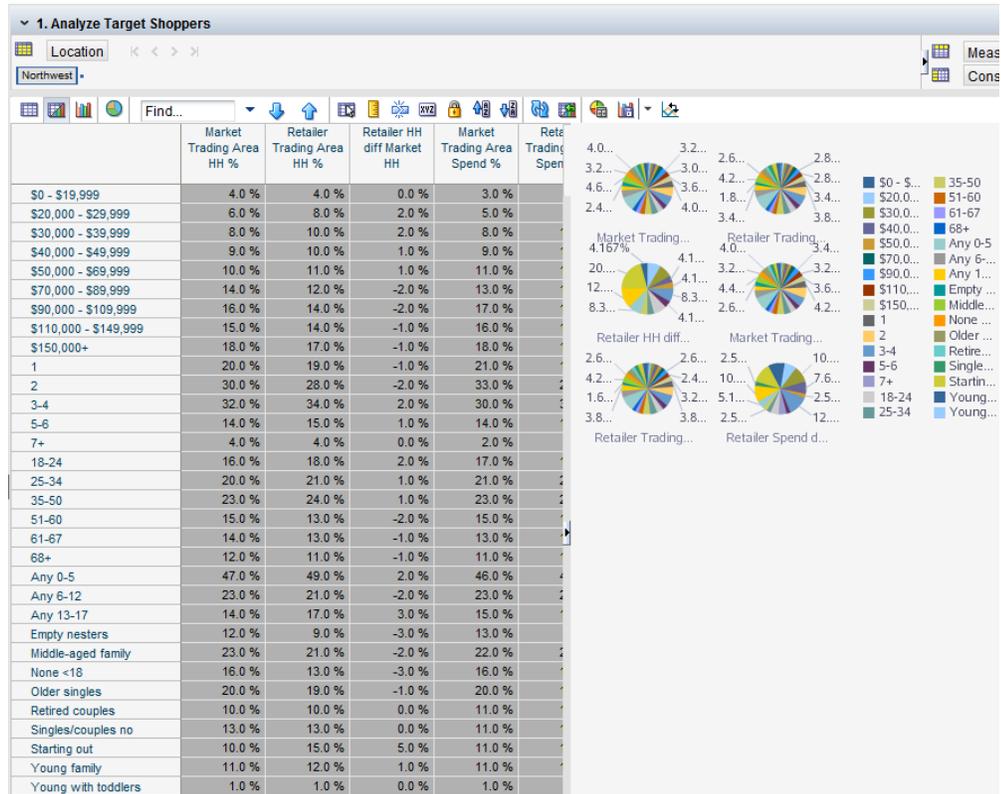
Table 4–4 lists the measures available in this view. The data is loaded from Household Panel data.

Table 4–4   Analyze Target Shoppers Measures

Label	Definition
Market Trading Area HH %	Category Planning and Assortment Planning @ Cluster Default Value Market Trading Area Household Percent. The Percentage of market households that belong to this profile.
Retailer Trading Area HH %	The percentage of retailer shopper households that belong to this profile.
Retailer HH diff Market HH	Difference between Retailer Trading Area Household % and Market Trading Area Household %. A Calculated measure which uses the following formula: Retailer HH % minus Market HH %.
Market Trading Area Spend %	Assortment Planning @ Cluster and Category Planning. Default Value Market Trading Area Spend Percent. The share of turnover that this profile gets for the market.
Retailer Trading Area Spend %	Category Planning and Assortment Planning @ Cluster Default Value Retailer Trading Area Household Percent. The percentage of retailer shopper households that belong to this profile.
Retailer Spend Diff Market Spend	A Calculated measure which uses the following formula: Retailer Spend % minus Market Spend %.
Key Take Away	The user comments that can be saved for each task.

Analyze Trading Area Opportunity View

Use this view to see the analytics that identify whether or not target shoppers offer a total store opportunity by comparing selected metrics against national (or total market).

This view exists at the following levels:

- Consumer Segment (a level in the Location dimension), such as Soccer Mom or Empty Nester
- Trading Area (a level in the Location dimension)
- Category (a level in the Product dimension)

Figure 4–9   Analyze Trading Area Opportunity View
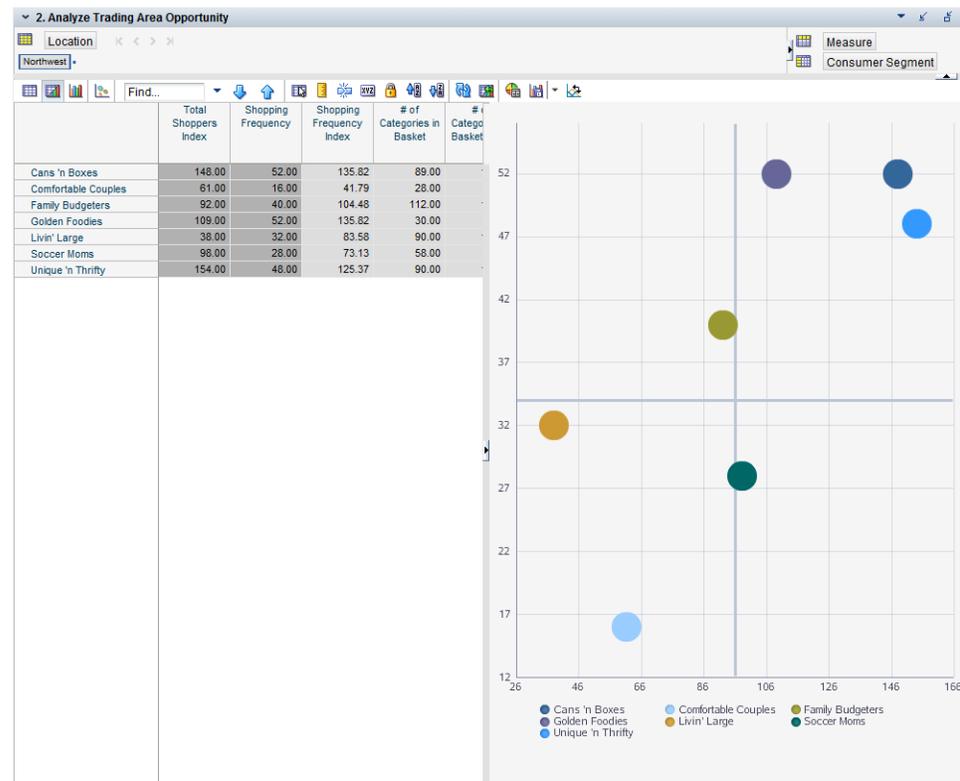
Table 4–5 lists the measures available in this view. The data is loaded from Household Panel data.

Table 4–5   Analyze Trading Area Opportunity Measures

Label	Definition
Total Shoppers Index	Assortment Planning @ Cluster Default Value Top Shopper Index. Represents the tier-1 of loyalty customers as determined in the retailers' loyalty solutions.
Shopping Frequency	Category Planning Default Value Shopping Frequency. Used for the shopping frequency of various consumer segments.
Shopping Frequency Index	Category Planning Default Value Shopping Frequency Index. Shopping frequency index of various consumer segments, segment or category as a whole.

Table 4–5   (Cont.) Analyze Trading Area Opportunity Measures

Label	Definition
# of Categories in Basket	Category Planning Default Value Number of Categories in Basket.
# of Categories in Basket Index	Category Planning Default Value Number of Categories in Basket Index. The number of categories in the basket index by consumer segment.
Avg. Basket Value	The Average basket value of various consumer segments.
Avg. Basket Value Index	Category Planning Default Value Average Basket Value Index Average basket value index of various consumer segments.
Key Take Away	The user comments that can be saved for each task.

Analyze Competition View

Use this view to determine who the retailer's strongest competitors are and if opportunities exist to improve the retailer's position.

This view exists at the following levels:

- Company (a level in the Company dimension)

- Trading Area (a level in the Location dimension)

- Category (a level the Product dimension)

Figure 4–10   Analyze Competition View

Table 4–6 lists the measures available in this view. The measures are loaded from Household Panel data.

Table 4–6   Analyze Competition Measures

Label	Definition
Value Share	Category Planning Default Value Share Value. The calculated measure which uses the following formula: Penetration multiplied by Loyalty Index multiplied by Spending Index.
Penetration (% Buying at Retailer) %	Category Planning Default Value Penetration (% Buying at Retailer) Percent. The percent of households buying at the retailer.

Table 4–6   (Cont.) Analyze Competition Measures

Label	Definition
Loyalty (% of Buyer Spend at Retailer)	Category Planning Default Value Loyalty (% of Buyer Spend at Retailer) Percent. The Percent of the spending that retail buyers spend at the retailer.
Spend Index	Category Planning Default Value Spend Index (Buyer Spend Compared to Average Spend) Index. The spending of buyers compared to the average spend by retailer.
Key Take Away	The user comments that can be saved for each task.

Assign Category Role Step

The retailer needs to view and analyze information from diverse sources and use that information to determine what role each category plays for the retailer. Category planning provides the ability to analyze category roles by providing insight into which categories are most strategic in the market as well as which are most strategic for the retailers target shoppers. This analysis sets the foundation for understanding which categories should be assigned which roles within the retailer's portfolio.

The following data is required for this step:

- Retailer's loyalty data
- Market scan data
- Household Panel data

This step contains two Measure Profiles:

- Market
- Retailer

This step also contains the following tabs and views:

- Analyze Market Share and Growth Tab:
    - Analyze Market Share and Growth View
    - Analyze Sales Trends View
    - Analyze Profit Contribution View
    - Analyze Value Share View
- Analyze Consumer Spend Tab:
    - Analyze Cross Category Spending View
    - Analyze Spend Versus Frequency View
    - Analyze Consumer Purchase Behavior View
    - Analyze Category Buyer Conversion View
    - Analyze Consumer Segment Cross-Category Spending View
- Quadrant Analysis Tab:
    - Mkt Share / Growth / Category Size
    - Mkt Share / Growth / Sales View
    - Retailer Share / Growth / Category Size View
    - Retailer Share / Growth / Sales View

■ Analyze and Assign Category Role - Industry Model A Tab:

– Analyze Historic Performance - Industry Model A View

– Analyze Forecasted Performance - Industry Model A View

– Assign Category Roles - Industry Model A View

■ Analyze and Assign Category Role - Industry Model B Tab:

– Analyze Historic Performance - Industry Model B View

– Analyze Forecasted Performance - Industry Model B View

– Assign Category Roles - Industry Model B View

Analyze Market Share and Growth Tab

The following figure shows the four views for this tab.

Figure 4–11   Analyze Market Share and Growth Tab Views
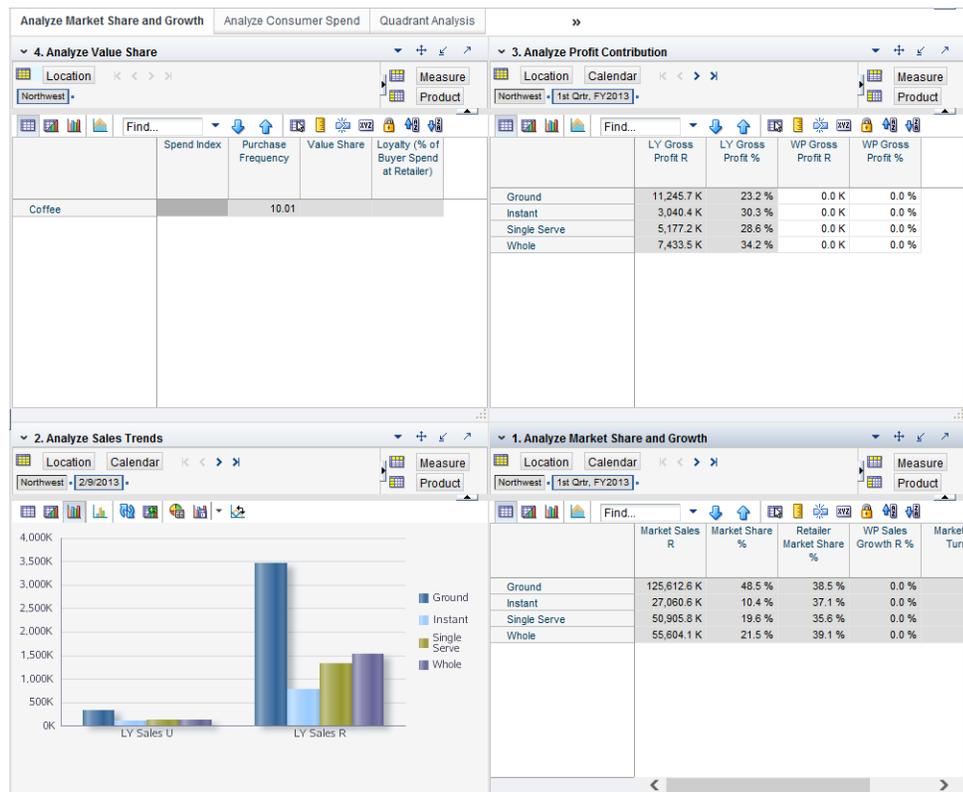
Analyze Market Share and Growth View

Use this view to analyze which categories are growing fastest in the market and which of the categories are the strongest for the retailer as compared to all competitors across all consumer segments. For an example of this view, see Figure 4-12.

This view exists at the following levels:

■ Category (a level in the Product dimension)

■ Market (a level in the Location dimension)

Figure 4–12   Analyze Market Share and Growth View (Market Measure Profile)

Table 4–7 lists the measures available in this view. The measures are loaded from market scan competitive data.

Table 4–7   Analyze Market Share and Growth Measures(Market Measure Profile)

Label	Definition
Market Sales R	Category Planning and Assortment Planning @ Cluster Default Value Market Sales Retail. The sales revenue for the item by retailer, obtained from a third party. The data is typically obtained quarterly.
Market Share %	That percent of dollar sales in a given category controlled by a distributor in a specific geography. Market share is also captured in terms of a distributor's all commodity volume (ACV) which represents the average weighted market share for all categories within the distributor's operation. The value or volume sales for one or more competitors of a retailer divided by the total universe (such as, market).
	The percent of sales volume (dollars or units) that a particular category, product segment, or item contributes to all the sales volume in the market.
Retailer Market Share %	Assortment Planning @ Cluster and Category Planning Default Value Retailer's Market Share Percent. The percent of sales revenue for the item by retailer, obtained from a third party. The data is typically obtained quarterly.
Retailer Share of Market Sales Growth %	Category Planning Default Value Retailer's Share of Market Sales Growth Percent. The value or volume sales increase or decrease of the retailer divided by the total market expressed as a percentage.
Market Inv Turn	Category Planning Default Value Market Inventory Turn Retail Ratio The number of times a retailer sells out of its complete inventory in a given period of time. It represents the speed with which inventory is sold. The most common way to compute turns is:
	Inventory Turns = Sales/Average Inventory
	If a retailer turns its inventory 22 times a year, it means that on average the retailer purchases and sells a product 22 times a year. Sales and inventory must be in the same units (that is, both at retail or cost or units). Higher turns are generally more desirable.
Market Inv Turn Rank	Category Planning Default Value Market Inv Turn Rank Retail Ratio. Calculated if possible as an ordinal ranking of all categories displayed.

Figure 4–13   Analyze Market Share and Growth View (Retail Measure Profile)

Table 4–8 lists the measures available in this view. The measures are loaded from retailer scan competitive data.

Table 4–8   Analyze Market Share and Growth Measures (Retail Measure Profile)

Label	Definition
LY Sales R	Assortment Planning @ Cluster and Category Planning Last Year Sales Retail. Last year sales revenue for the item obtained from a third party. The data is typically obtained quarterly.
Fc Sales R	Category Planning and Assortment Planning @ Cluster Forecast Sales Retail. The sales forecast from Oracle Retail Demand Forecasting in dollars.
WP Sales R	Category Planning and Assortment Planning @ Cluster Working Plan Sales by Consumer Segment Retail.
LY Gross Profit R	Assortment Planning @ Cluster and Category Planning Last Year Gross Profit Retail. Last year's Retail Sales minus Last Year's Cost of Goods Sold.
LY Gross Profit R %	Category Planning and Assortment Planning @ Cluster Last Year Gross Profit Percent. Last year's Retail Sales minus Last Year's Cost of Goods Sold divided by Last Year's Retail Sales.
WP Gross Profit R	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit Retail. Used only in IPI calculations. The current Retail Sales minus Last Year's Cost of Goods Sold.
WP Gross Profit %	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit Percent. Current approved Retail Sales minus Cost of Goods Sold divided by Retail Sales.

Analyze Sales Trends View

Use this view to determine the category role between seasonal and convenience. Using the chart, you can infer which of the categories exhibit seasonal behavior. This information is best viewed as a column chart.

This view exists at the following levels:

■   Month (a level in the Calendar dimension)

■   Category (a level in the Product dimension)

Figure 4–14   Analyze Sales Trends View
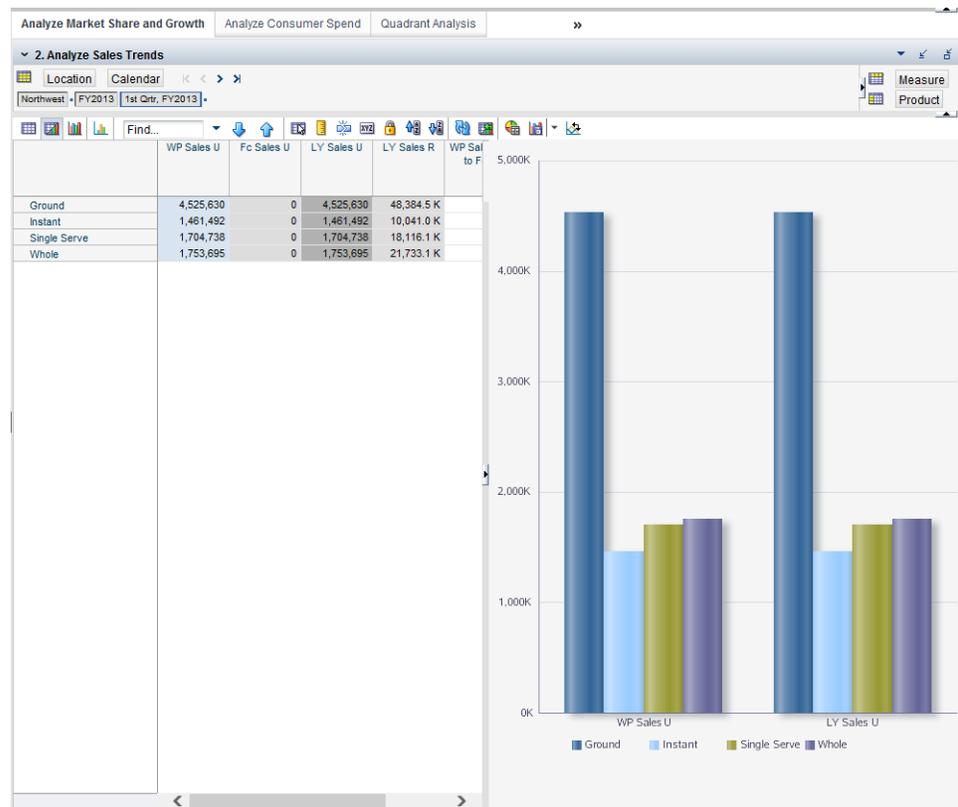
Table 4–9 lists the measures available in this view.

Table 4–9   Analyze Sales Trends Measures

Label	Definition
LY Sales R	Assortment Planning @ Cluster and Category Planning Last Year Sales Retail. Last year sales revenue for the item obtained from a third party. The data is typically obtained quarterly.
FC Sales R	Category Planning and Assortment Planning @ Cluster Forecast Sales Retail. The sales forecast from Oracle Retail Demand Forecasting in dollars.
Wp Sales R	Category Planning and Assortment Planning @ Cluster Working Plan Sales by Consumer Segment Retail.
LY Gross Profit R	Assortment Planning @ Cluster and Category Planning Last Year Gross Profit Retail. Last year's Retail Sales minus Last Year's Cost of Goods Sold.
LY Gross Profit %	Category Planning and Assortment Planning @ Cluster Last Year Gross Profit Percent. Last year's Retail Sales minus Last Year's Cost of Goods Sold divided by Last Year's Retail Sales.
WP Gross Profit R	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit Retail. Used only in IPI calculations. The current Retail Sales minus Last Year's Cost of Goods Sold.
WP Gross Profit %	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit Percent. Current approved Retail Sales minus Cost of Goods Sold divided by Retail Sales.

Analyze Profit Contribution View

Use this view to determine how each category contributes to margin and profit across all consumer segments. This information is best viewed as a scatter chart.

This view exists at the following levels:

■ Market (a level in the Location dimension)

■ Category (a level in the Product dimension)

Figure 4–15   Analyze Profit Contribution View

Table 4–10 lists the measures available in this view.

Table 4–10   Analyze Profit Contribution Measures

Label	Definition
LY Gross Profit R	Assortment Planning @ Cluster and Category Planning Last Year Gross Profit Retail. Last year's Retail Sales minus Last Year's Cost of Goods Sold.
LY Gross Profit %	Category Planning and Assortment Planning @ Cluster Last Year Gross Profit Percent. Last year's Retail Sales minus Last Year's Cost of Goods Sold divided by Last Year's Retail Sales.
WP Gross Profit R	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit Retail. Used only in IPI calculations. The current Retail Sales minus Last Year's Cost of Goods Sold.
WP Gross Profit %	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit Percent. Current approved Retail Sales minus Cost of Goods Sold divided by Retail Sales.

Analyze Value Share View

Use this view to analyze the value share. This information is best viewed as a bubble chart.

Figure 4–16   Analyze Value Share View

Table 4–11 lists the measures available in this view.

Table 4–11   Analyze Value Share Measures

Label	Definition
Spend Index	Category Planning Default Value Spend Index (Buyer Spend Compared to Average Spend) Index. The spending of buyers compared to the average spend by retailer.
Purchase Frequency	Category Planning Default Value Purchase Frequency Value. The average number of times each buyer purchases an item over a given time period from a particular retailer.
	Purchase Frequency = Total Purchase Occasions # of Buying Households.
Value Share	Category Planning Default Value Share Value. The calculated measure which uses the following formula: Penetration multiplied by Loyalty Index multiplied by Spending Index.
Loyalty (% of Buyer Spend at Retailer)%	Category Planning Default Value Loyalty (% of Buyer Spend at Retailer) Percent. The share of annual category requirements that the consumer is able to satisfy with a single brand (size, type, flavor, and so on). For example, if a consumer makes 10 purchases annually in a given category, 3 of which are made of Brand A, Brand A would have a 30% loyalty, (3/10 = 30%). This measure enables the distributor to discriminate in favor of those items for which targeted consumers have shown a higher loyalty to purchase versus other products within the category.
	The discontinuation of these products could result in the target consumer leaving the store. Loyalty is converted into an index by comparing (dividing) the loyalty of Brand A by the average loyalty of all brands within the category. Loyalty and the loyalty index can be measured at all levels of data analysis (brand, size, flavor, SKU, and so on).

Analyze Consumer Spend Tab

The following figure shows the initial views displayed for this tab.

Figure 4–17   Analyze Consumer Spend Tab Views
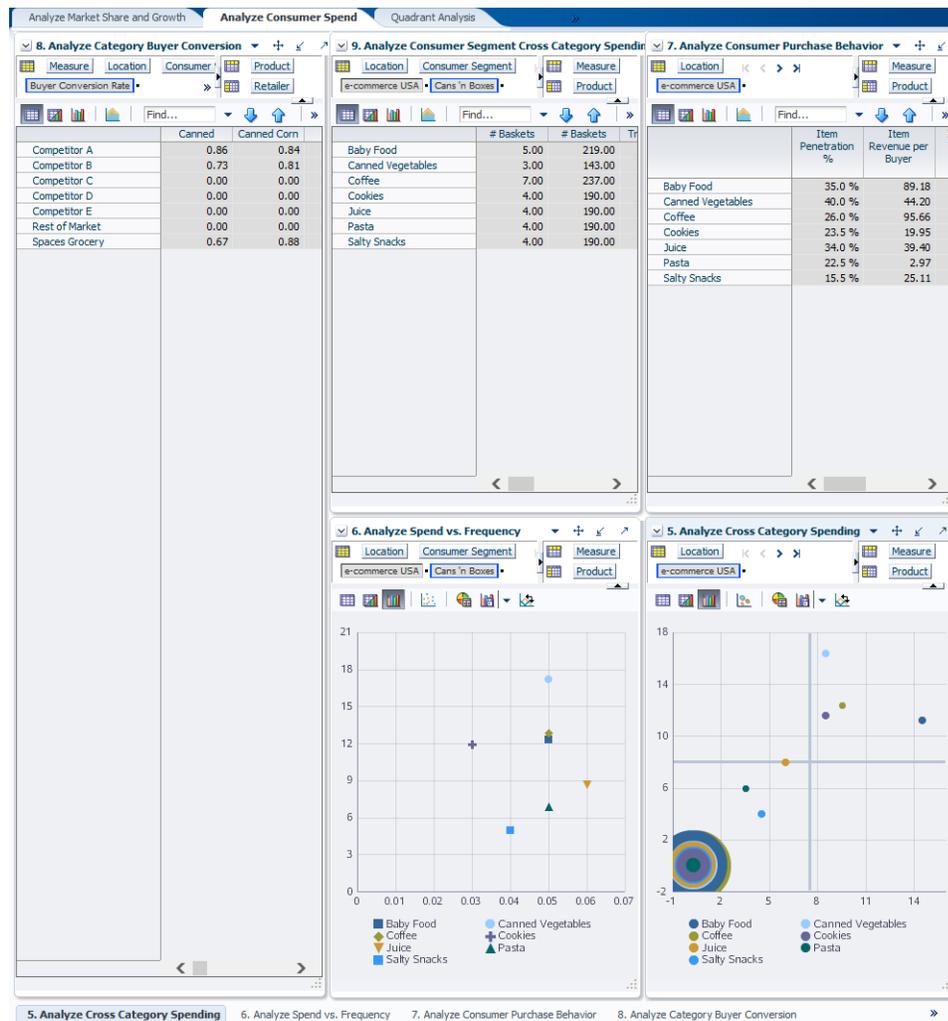
Analyze Cross Category Spending View

Use this view to analyze which categories are shopped more frequently, have a higher market share, or represent higher market growth compared to other categories for the retailer. This information is best viewed as a bubble chart.

Figure 4–18   Analyze Cross Category Spending View
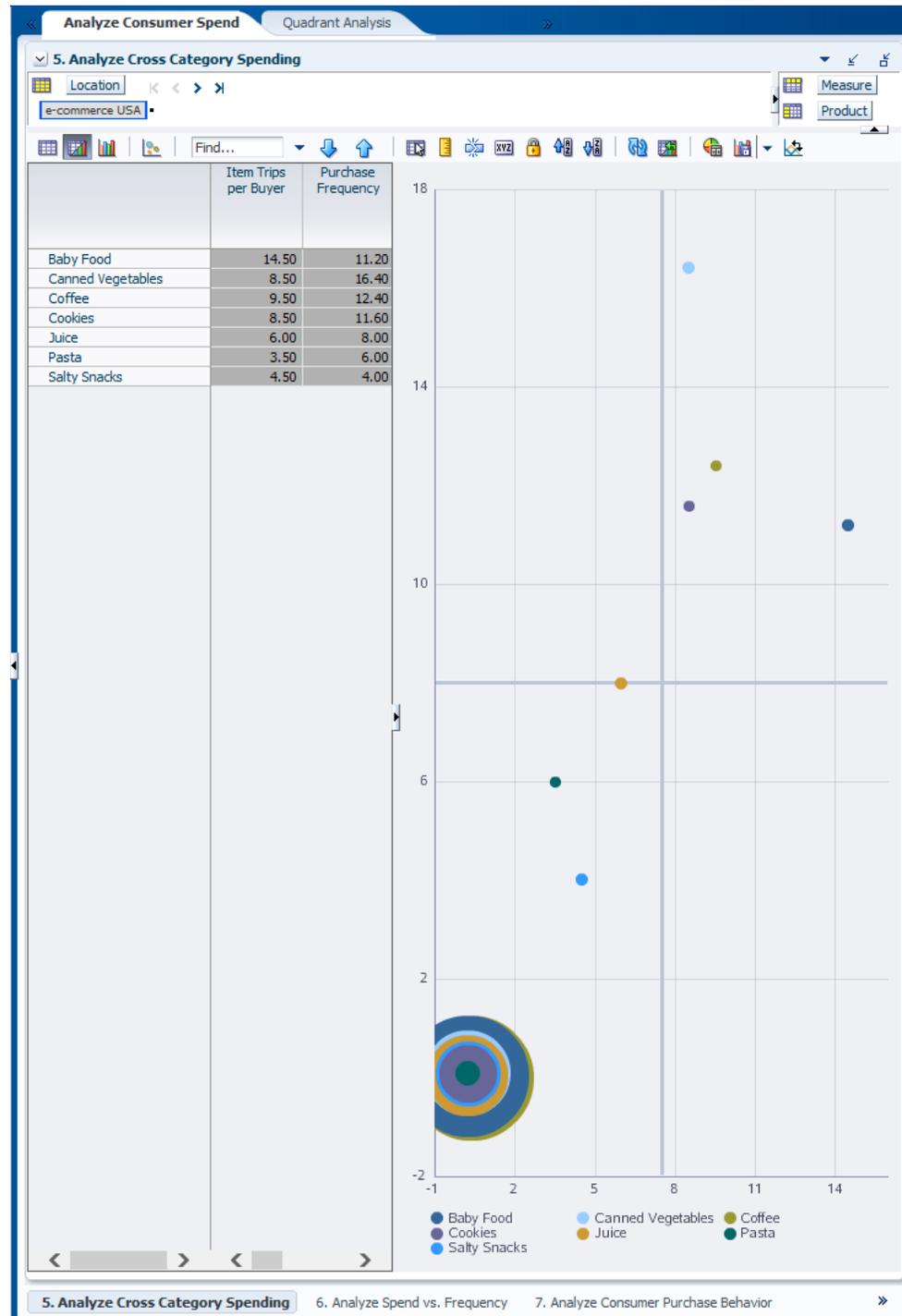
The view exists at the following levels:

■   Trading Area (a level in the Location dimension)

■   Category (a level in the Product dimension)
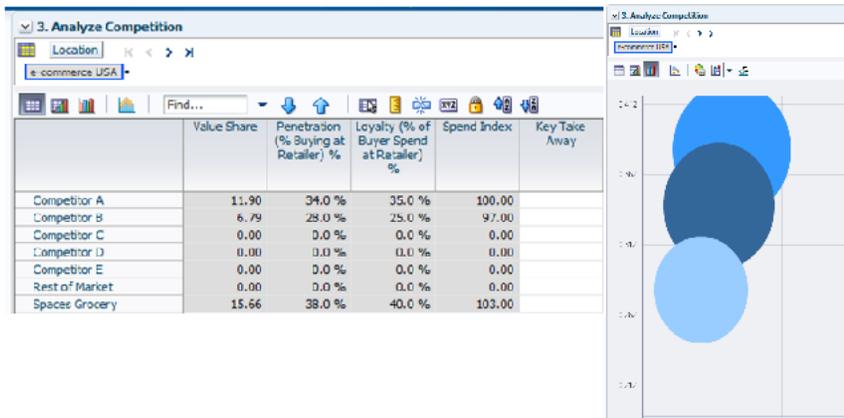
Table 4–12 lists the measures available in this view. The measures are loaded from Household Panel data.

Table 4–12   Analyze Cross Category Spending Measures

Label	Definition
Item Trips per Buyer	Category Planning and Assortment Planning @ Cluster Default Value Item Trips per Buyer Value The number of times an average buyer bought this item in this sub-category.
Purchase Frequency	Category Planning Default Value Purchase Frequency Value. The average number of times each buyer purchases an item over a given time period from a particular retailer.
	Purchase Frequency = Total Purchase Occasions # of Buying Households.
Market Share %	That percent of dollar sales in a given category controlled by a distributor in a specific geography. Market share is also captured in terms of a distributor's all commodity volume (ACV) which represents the average weighted market share for all categories within the distributor's operation. The value or volume sales for one or more competitors of a retailer divided by the total universe (such as, market)
	The percent of sales volume (dollars or units) that a particular category, product segment, or item contributes to all the sales volume in the market.
Retailer Market Share %	Assortment Planning @ Cluster and Category Planning Default Value Retailer's Market Share Percent. The percent of sales revenue for the item by retailer, obtained from a third party. The data is typically obtained quarterly.
Market Sales Growth %	Assortment Planning @ Cluster and Category Planning Default Value Market Sales Growth Percent. The percent increase or decrease in sales volume for the entire market from the prior year.
Item Revenue per Buyer	The amount of dollars spent by an average consumer for a specific market/region.

Analyze Spend Versus Frequency View

Use this view to identify which categories are important for those customers who shop at the retailer. This information is best viewed as a scatter chart.

This view exists at the following levels:

- Consumer Segment (a level in the Location dimension)

- Market (a level in the Location dimension)

- Category (a level in the Product dimension)

Figure 4–19   Analyze Spend vs. Frequency View

Table 4–13 lists the measures available in this view. The measures are loaded from market scan and retailer data.

Table 4–13   Analyze Spend Vs. Frequency Measures

Label	Definition
Annual Spend Index	Category Planning Default Value Annual Spend Index. The average annual dollar value that each of the Consumer Segments spent on each of the categories.
Purchase Frequency	Category Planning Default Value Purchase Frequency Value. The average number of times each buyer purchases an item over a given time period.
	Purchase Frequency = Total Purchase Occasions # of Buying Households.

Analyze Consumer Purchase Behavior View

Use this view to analyze consumer purchase behavior across categories.

This view exists at the following levels:

- Category (a level in the Product dimension)

- Consumer Segment (a level in the Location dimension)

Figure 4–20   Analyze Consumer Purchase Behavior
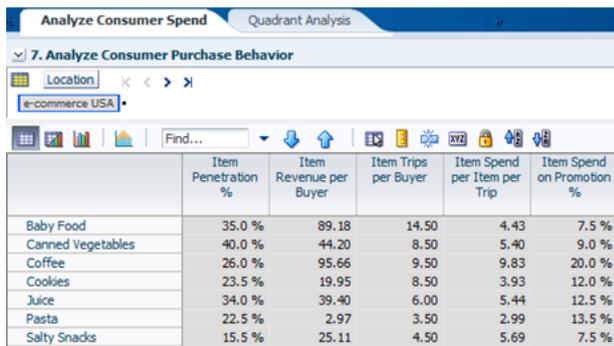
Table 4–14 lists the measures available in this view.

Table 4–14   Analyze Consumer Purchase Behavior Measures

Label	Definition
Item Penetration %	Category Planning and Assortment Planning @ Cluster Default Value Item Penetration Percent. The percent of households that purchased a product group at least once within a given time frame for a specific market/region. Sometimes called Consumption Index.
Item Revenue per Buyer	The amount of dollars spent by an average consumer for a specific market/region.
Item Trips per Buyer	Category Planning and Assortment Planning @ Cluster Default Value Item Trips per Buyer Value. The number of times an average buyer bought this item in this sub-category.
Item Spend per Item per Trip	Category Planning and Assortment Planning @ Cluster Default Value Item Spend per Item per Trip Value. The amount spent per buyer trip on the item.
Item Spend on Promotion %	Category Planning Default Value Item Spend on Promotion Percent. The percentage of the item's total sales that occurred due to a promotion.

Analyze Category Buyer Conversion View

Use this view to compare the percentage of buyer conversion of the retailer with that of named competitors.

Figure 4–21   Analyze Category Buyer Conversion View

This view exists at the following levels:

■   Category (a level in the Product dimension)

■   Retailer (a level in the Retailer dimension)

■   Consumer Segment (a level in the Location dimension)

Table 4–15 lists the measure available in this view.

Table 4–15   Analyze Category Buyer Conversion Measure

Label	Definition
Buyer Conversion Rate	Category Planning and Assortment Planning @ Cluster Default Value Buyer Conversion Rate Value. Indicates the percentage of buyers who shop the sub-category as compared to all shoppers who shop the store.

Analyze Consumer Segment Cross-Category Spending View

Use this view to determine what is more important for spending to each of the consumer segments. This can be based on market data and retailer data.

The view exists at the following levels:

■   Category (a level in the Product dimension)

■   Market (a level in the Location dimension)

Figure 4–22   Analyze Consumer Segment Cross-Category Spending View

Table 4–16 lists the measures available in this view. The measures are loaded from market scan and retailer data.

Table 4–16   Analyze Consumer Segment Cross-Category Spending Measures

Label	Definition
# Baskets with Category	The number of baskets that contain at least one of the items or product segments.
# Baskets with Category Rank	Category Planning Default Value Number Baskets with Category Rank Value. The number of baskets that contain at least one of the items or product segment calculated as an ordinal ranking.
Transaction Size with Category	Category Planning Default Value Transaction Size with Category Value. The average-bill-amount of all transactions that contained at least 1 item from each of the categories.
Transaction Size with Category Rank	Category Planning Default Value Transaction Size with Category Rank Value. The average-bill-amount of all transactions that contained at least 1 item from each of the categories calculated as an ordinal ranking.
Annual Spend Index	Category Planning Default Value Annual Spend Index. The average annual dollar value that each of the Consumer Segments spent on each of the categories.
Annual Spend Index Rank	Category Planning Default Value Annual Spend Index Rank Index. The average annual dollar value that each of the Consumer Segments spent on each of the categories calculated as an ordinal ranking.
Purchase Frequency	Category Planning Default Value Purchase Frequency Value. The average number of times each buyer purchases an item over a given time period. Purchase Frequency = Total Purchase Occasions # of Buying Households.
Purchase Frequency Rank	Category Planning Default Value Purchase Frequency Rank Value. The average number of times each buyer purchases an item over a given time period calculated as an ordinal ranking.

Quadrant Analysis Tab

This tab has four views. Figure 4–23 shows those views.

Figure 4–23   Quadrant Analysis Views
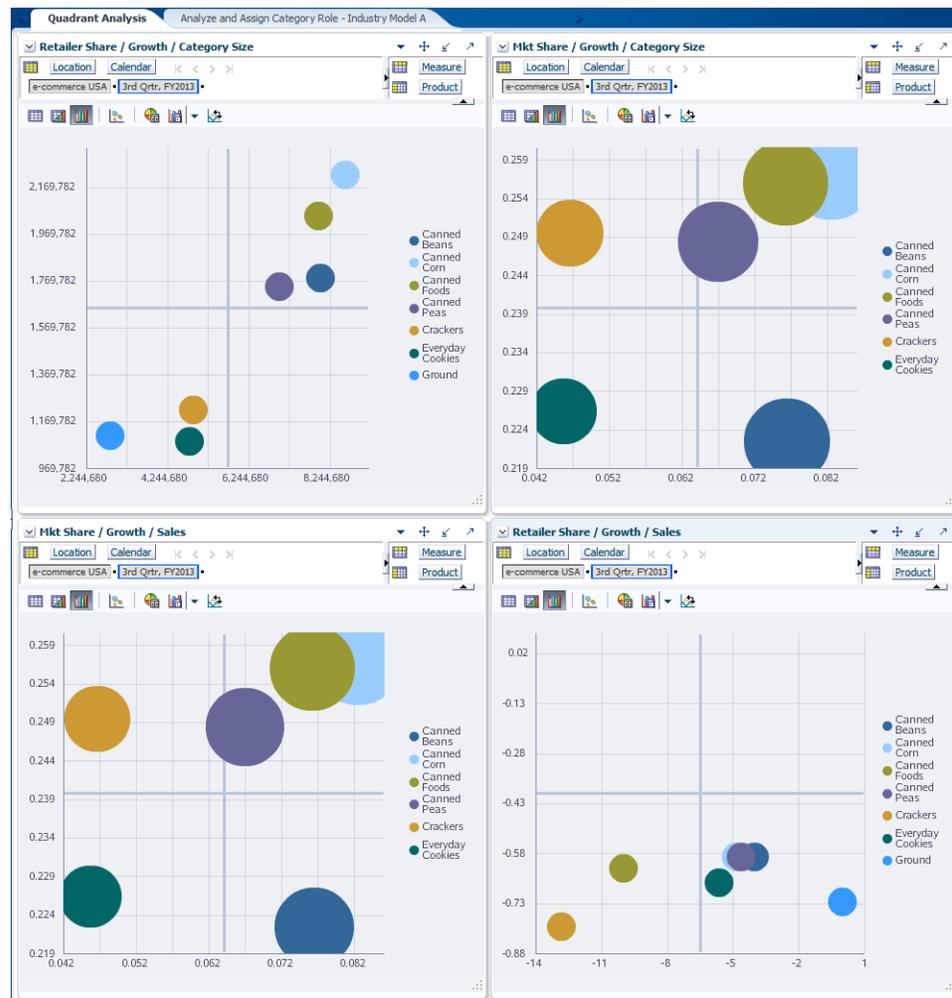
Mkt Share / Growth / Category Size

Use this view to analyze market share, growth, and category size. This information is best viewed as a bubble chart.

Figure 4–24   Market Share / Growth / Category Size View
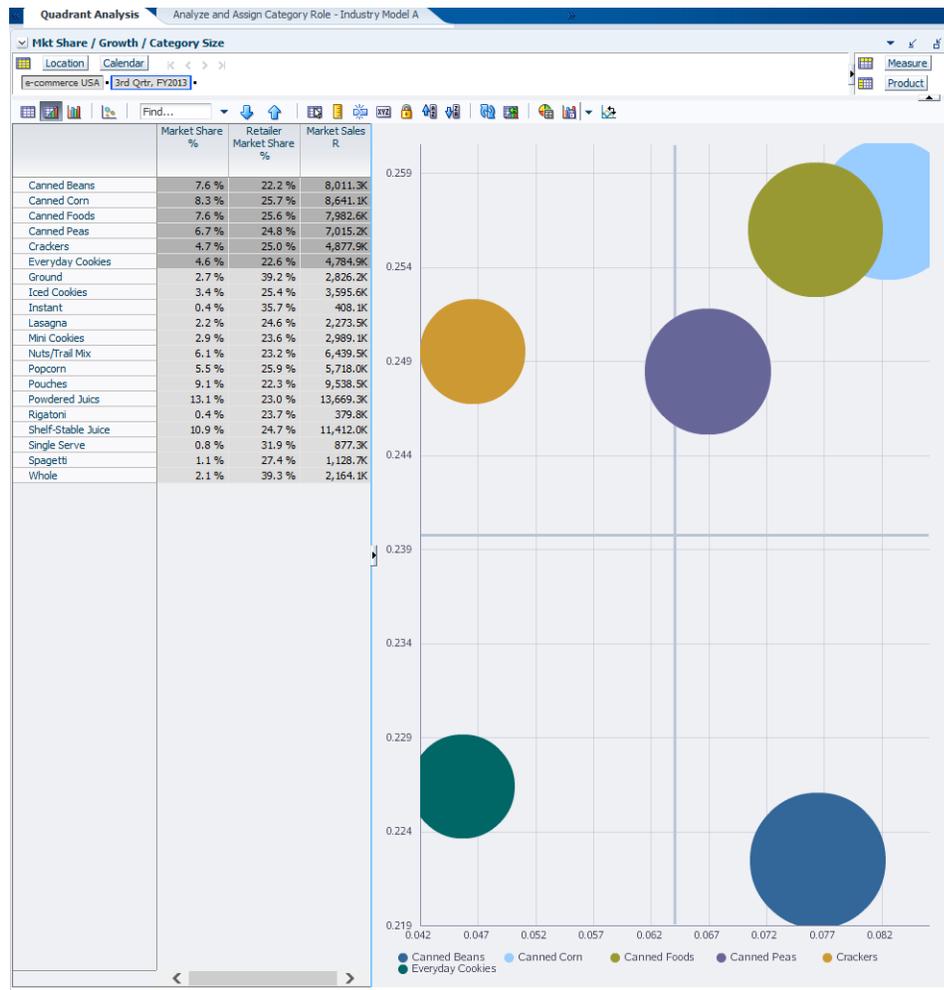
Table 4–17 lists the measure available in this view. The measure is loaded from market scan and retailer data.

Table 4–17   Mkt Share / Growth / Category Size Measures

Label	Definition
Market Share %	That percent of dollar sales in a given category controlled by a distributor in a specific geography. Market share is also captured in terms of a distributor's all commodity volume (ACV) which represents the average weighted market share for all categories within the distributor's operation. The value or volume sales for one or more competitors of a retailer divided by the total universe (such as, market).
Retailer Market Share %	Assortment Planning @ Cluster and Category Planning Default Value Retailer's Market Share Percent. The percent of sales revenue for the item by retailer, obtained from a third party. The data is typically obtained quarterly.
Market Sales R	Category Planning and Assortment Planning @ Cluster Default Value Market Sales Retail. The sales revenue for the item by retailer, obtained from a third party. The data is typically obtained quarterly.

Mkt Share / Growth / Sales View

Use this view to analyze market share, growth, and sales. This information is best viewed as a bubble chart.

Figure 4–25   Mkt Share / Growth / Sales View

Table 4–18 lists the measures available in this view. The measures are loaded from market scan and retailer data.

Table 4–18   Mkt Share / Growth / Sales Measures

Label	Definition
Market Share %	That percent of dollar sales in a given category controlled by a distributor in a specific geography. Market share is also captured in terms of a distributor's all commodity volume (ACV) which represents the average weighted market share for all categories within the distributor's operation. The value or volume sales for one or more competitors of a retailer divided by the total universe (such as, market).
Retailer Market Share %	Assortment Planning @ Cluster and Category Planning Default Value Retailer's Market Share Percent. The percent of sales revenue for the item by retailer, obtained from a third party. The data is typically obtained quarterly.

Table 4–18   (Cont.) Mkt Share / Growth / Sales Measures

Label	Definition
WP Sales R	Assortment Planning @ Cluster and Category Planning Working Plan Sales Retail. The current planned sales revenue for the item.

Retailer Share / Growth / Category Size View

Use this view to analyze retailer share, growth, and category size. This information is best viewed as a bubble chart.

Figure 4–26   Retailer Share / Growth / Category Size View

lists the measures available in this view. The measures are loaded from market scan and retailer data.

Table 4–19   Retailer Share / Growth / Category Size Measures

Label	Definition
Retailer Share of Market Sales Growth %	Category Planning Default Value Retailer's Share of Market Sales Growth Percent. The value or volume sales increase or decrease of the retailer divided by the total market expressed as a percentage.
Wp Sales Growth R%	Category Planning Working Plan Sales Growth Retail Percent.
Market Sales R	Category Planning and Assortment Planning @ Cluster Default Value Market Sales Retail. The sales revenue for the item by retailer, obtained from a third party. The data is typically obtained quarterly.
Wp Sales R	Assortment Planning @ Cluster and Category Planning Working Plan Sales Retail. The current planned sales revenue for the item.

Retailer Share / Growth / Sales View

Use this view to analyze retailer share, growth, and sales. This information is best viewed as a bubble chart.
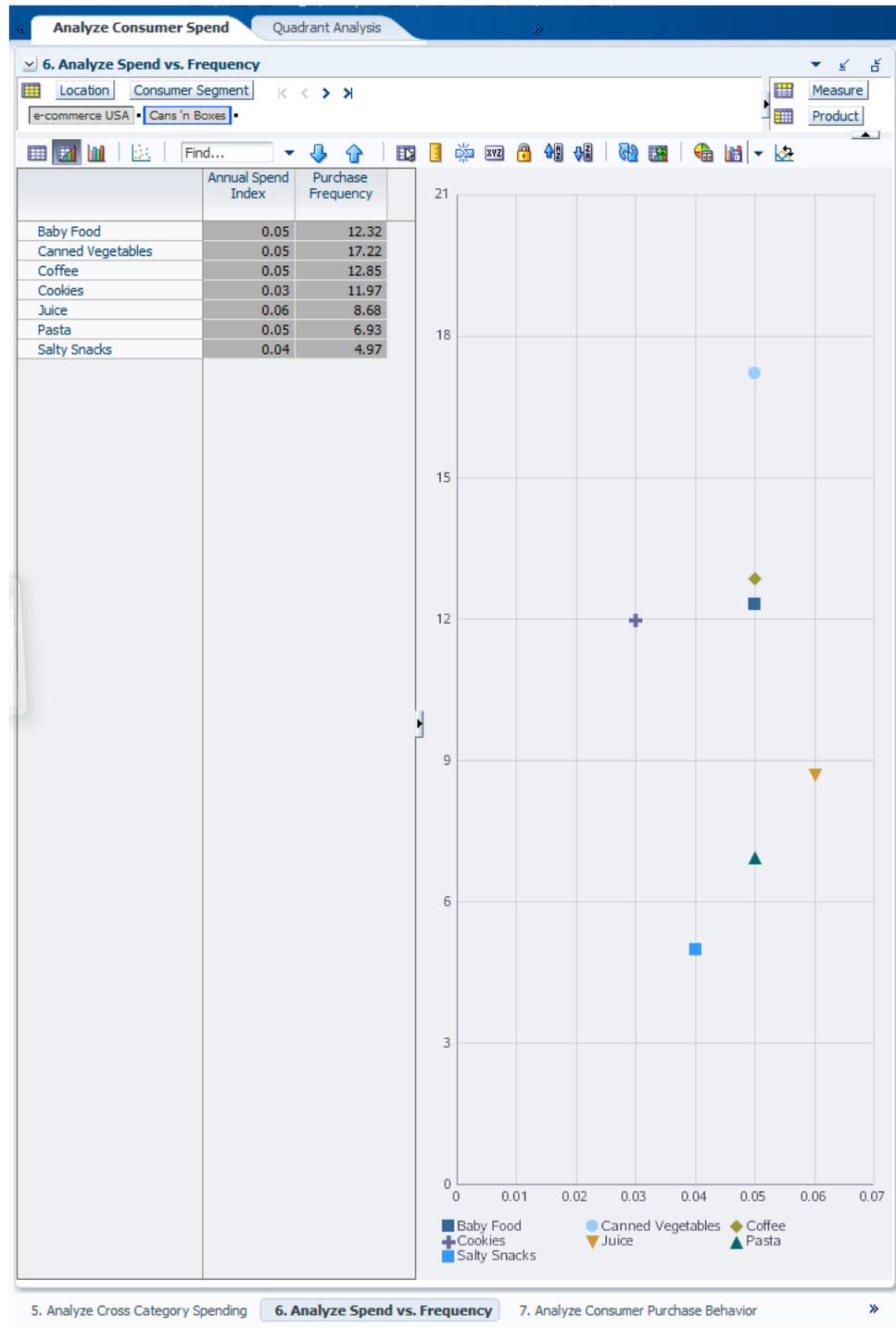
Figure 4–27   Retailer Share / Growth / Sales View
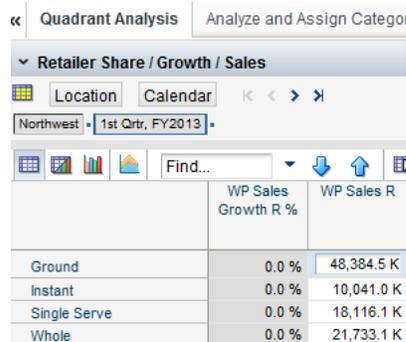
Table 4–20 lists the measures available in this view. The measures are loaded from market scan and retailer data.

Table 4–20   Retailer Share / Growth / Sales Measures

Label	Definition
Wp Sales Growth R%	Category Planning Working Plan Sales Growth Retail Percent.
Wp Sales R	Assortment Planning @ Cluster and Category Planning Working Plan Sales Retail. The current planned sales revenue for the item.

Analyze and Assign Category Role - Industry Model A Tab

Use this tab to analyze and assign the role of each category based on different Category Management frameworks and capabilities. There are two frameworks available as part of the base GA solution. These frameworks draw from industry standard best practices. However, it is possible to configure or customize the framework to meet your individual currently used best practice if there is one, leveraging the configuration framework in RPAS. It is important to understand that role assignment is based on market and consumer focused analysis combined with industry standard frameworks for automated role assignment. The expectation is that the user leverages insights from upstream analysis, retailer strategies, as well as recommendations from industry standard frameworks to override and approve category roles.

The data required for this analysis comes from the retailer's POS data and does not have details broken down by consumer segment. However, this data can be aggregated on the product hierarchy. Model A requires a plot or a bubble-chart of Item Penetration (X-Axis) vs. Purchase Frequency (Y-Axis) plotted for individual categories and Sales Value (Bubble-Size). It is also used to represent the size of individual categories. Roles are defined on the basis of relative positioning and size of categories on the plot/chart. The data used to derive these roles can be forecast data from a forecasting application (such as RDF) or historic data (actuals) in the form of LY data.

Model A requires the following data:

- Retailer's POS data
- Retailer's forecast data
- Household Panel data

Category roles pre-defined in Industry Model A consists of:

- Destination
- Routine
- Seasonal
- Convenience

Table 4–28 shows the views for this tab.

Figure 4–28   Analyze and Assign Category Role - Industry Model A Tab Views
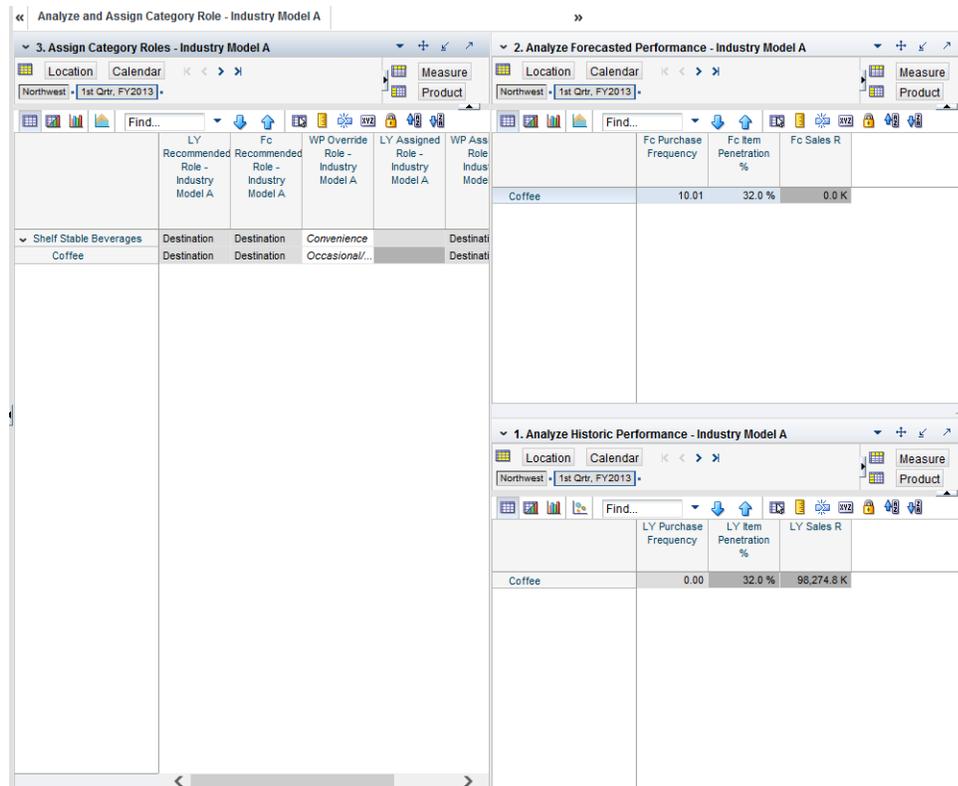
Analyze Historic Performance - Industry Model A View

Use this view to analyze historic performance for determining category roles, such as the following:

- Destination
- Routine
- Seasonal
- Convenience

This information is best viewed as a bubble chart.

Figure 4–29 Analyze Historic Performance Role - Industry Model A View
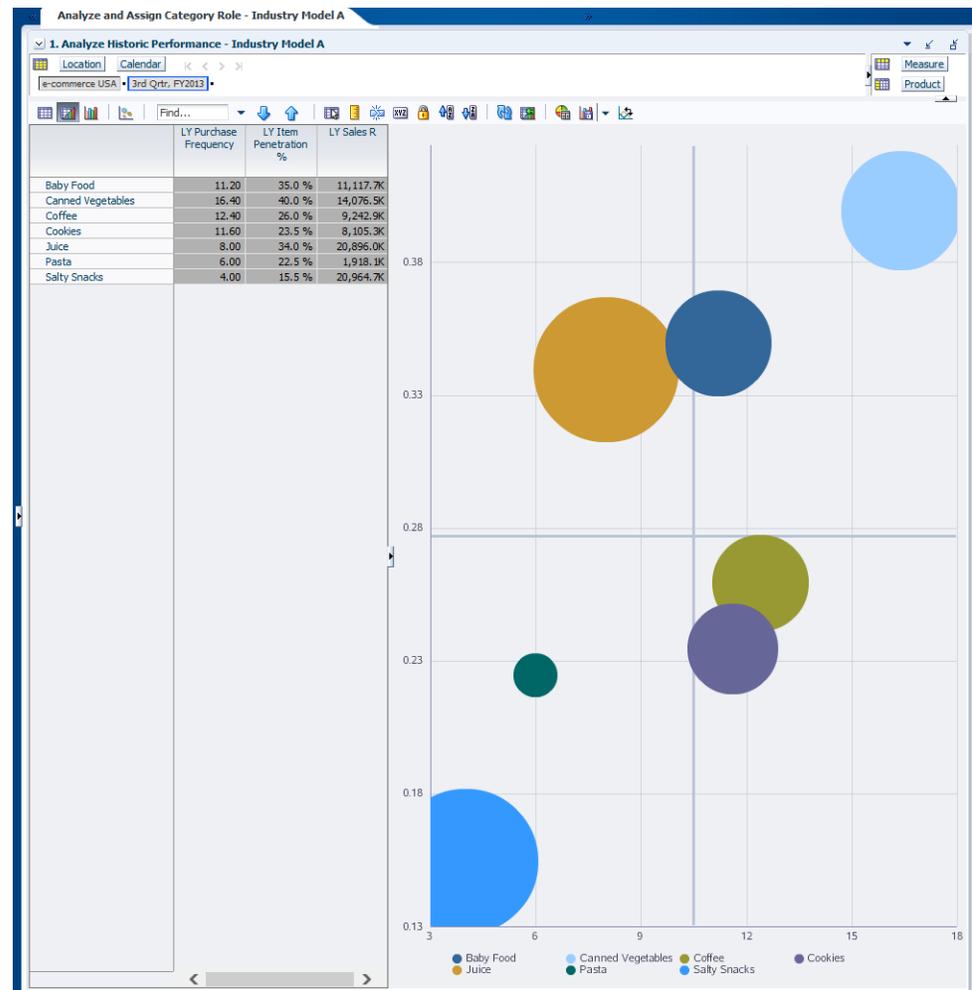
Table 4–21 lists the measures available in this view. The measures are loaded from market scan and retailer data.

Table 4–21   Analyze Historic Performance - Industry Model A Measures

Label	Definition
LY Purchase Frequency	Category Planning Last Year Purchase Frequency Value. The average number of times each buyer purchased an item during the same period last year.
LY Item Penetration %	Category Planning Last Year Item Penetration Percent.
LY Sales R	Assortment Planning @ Cluster and Category Planning Last Year Sales Retail. Last year sales revenue for the item obtained from a third party. The data is typically obtained quarterly.

Analyze Forecasted Performance - Industry Model A View

Use this view to analyze forecasted performance for determining category roles.

This view exists at the following levels:

■   Market (a level in the Location dimension)

- Consumer Segment (a level in the Location dimension)

- Category (a level in the Product dimension)

Figure 4–30   Analyze Forecasted Performance - Industry Model A View
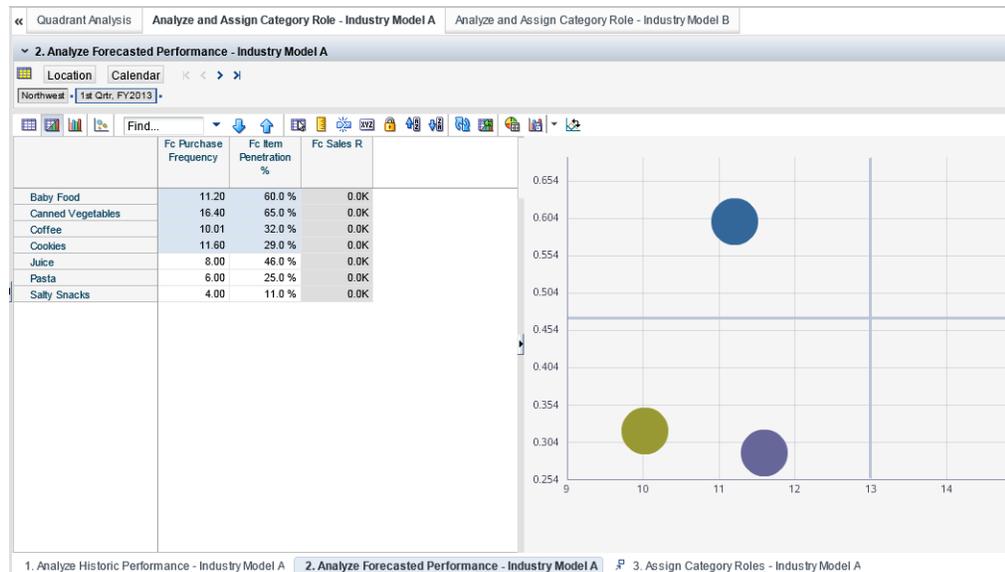
Table 4–22 lists the measures available in this view. The measures are loaded from market scan and retailer data.

Table 4–22   Analyze Forecasted Performance - Industry Model A Measures

Label	Definition
Fc Purchase Frequency	Category Planning Forecast Purchase Frequency Value. The forecasted average number of times each buyer purchases an item over a given time period from a particular retailer.
	Purchase Frequency = Total Purchase Occasions # of Buying Households.
Fc Item Penetration %	The forecasted percent of households that purchased a product group at least once within a given time frame for a specific market/region. Sometimes called Consumption Index.
Fc Sales R	Category Planning and Assortment Planning @ Cluster Forecast Sales Retail. The sales forecast from Oracle Retail Demand Forecasting in dollars.

Assign Category Roles - Industry Model A View

Use this view to assign category roles based on historic and forecasted performance. You are able to override the role recommended by the system. These roles drive the preset weights, which are specified in the Category Management Administration task, to help drive the assortment recommendations which best align with the role.

This view exists at the following level:

- Category (a level in the Product dimension)

Figure 4–31   Assign Category Roles - Industry Model A View

[Table 4–23](#) lists the measures available in this view.

Table 4–23   Assign Category Roles - Industry Model A Measures

Label	Definition
LY Recommended Role- Industry Model A	Category Planning Last Year Recommended Role - Industry Model A Text. The system or app recommended role for a category from a Model A perspective in the last financial year's assortment.
Fc Recommended Role- Industry Model A	The forecasted role for a category from a Model A perspective in the last financial year's assortment.
WP Override Role - Industry Model A	Category Planning Working Plan Override Role - Industry Model A Text. An override field giving the user an option to overwrite the category role that is being suggested by Model A being used for category role assignment.
LY Assigned Role - Industry Model A	Category Planning Last Year Assigned Role - Industry Model A Text. The Approved Category Role (Industry Model A) last year.
WP Assigned Role - Industry Model A	Category Planning Working Plan Assigned Role - Industry Model A. The Approved Category Role (Industry Model A).
OP Assigned Role - Industry Model A	Category Planning Original Plan Assigned Role - Industry Model A Text. The Pre-Season Approved Category Role (Industry Model A).

Analyze and Assign Category Role - Industry Model B Tab

The data required for this analysis comes from the retailer's POS data and does not have details broken down by consumer segment. However, this data can be aggregated on the product hierarchy. Model B requires a plot of Sales R and Gross Profit % to derive roles for the respective categories. Roles are defined on the basis of relative positioning of categories on the plot/chart. The data used to derive these roles can be forecast data from forecasting application (such as RDF) or historic data (actuals) in the form of LY data.

The following data is required:

- Retailer's POS data
- Retailer's forecast data

Category roles defined using Industry Model B:

- Flagship

- Cash Machine

- Maintain

- Core Traffic

- Under Fire

- Rehab

Figure 4–32 shows the views for this tab.

Figure 4–32   Analyze and Assign Category Role - Industry Model B Tab Views
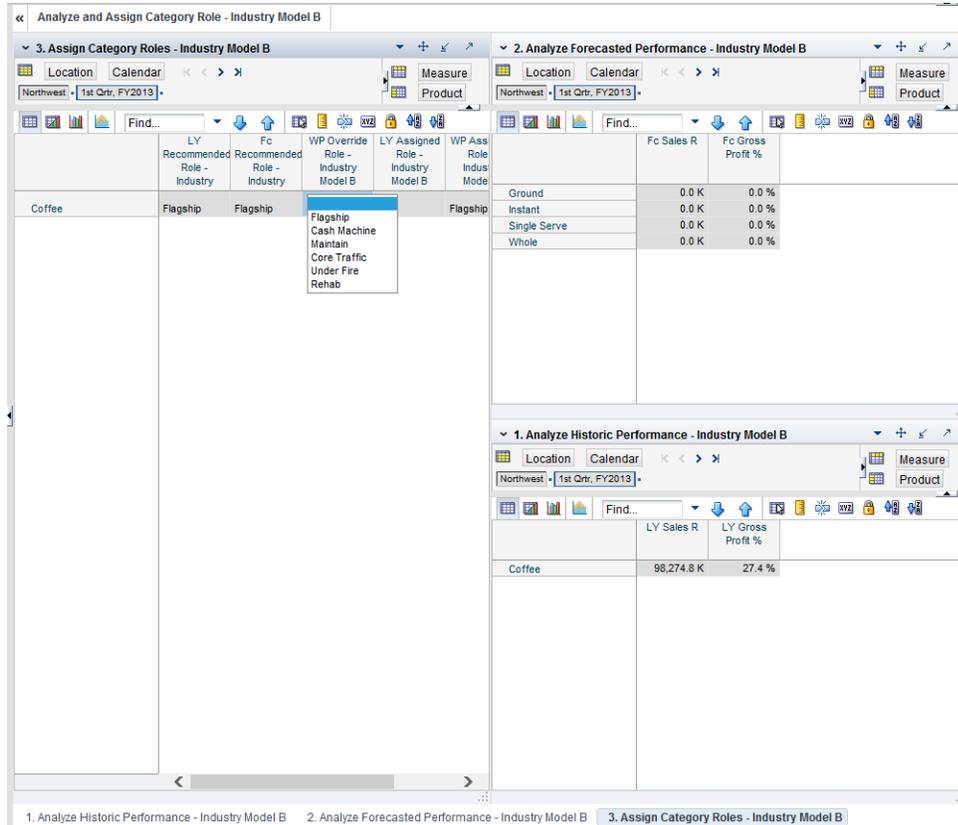
Analyze Historic Performance - Industry Model B View

Industry Model B is used to determine roles enlisted below:

- Flagship

- Cash Machine

- Maintain

- Core Traffic

- Under Fire

- Rehab

Use this view to analyze historic performance for determining category roles. This information is best viewed as a bubble chart.

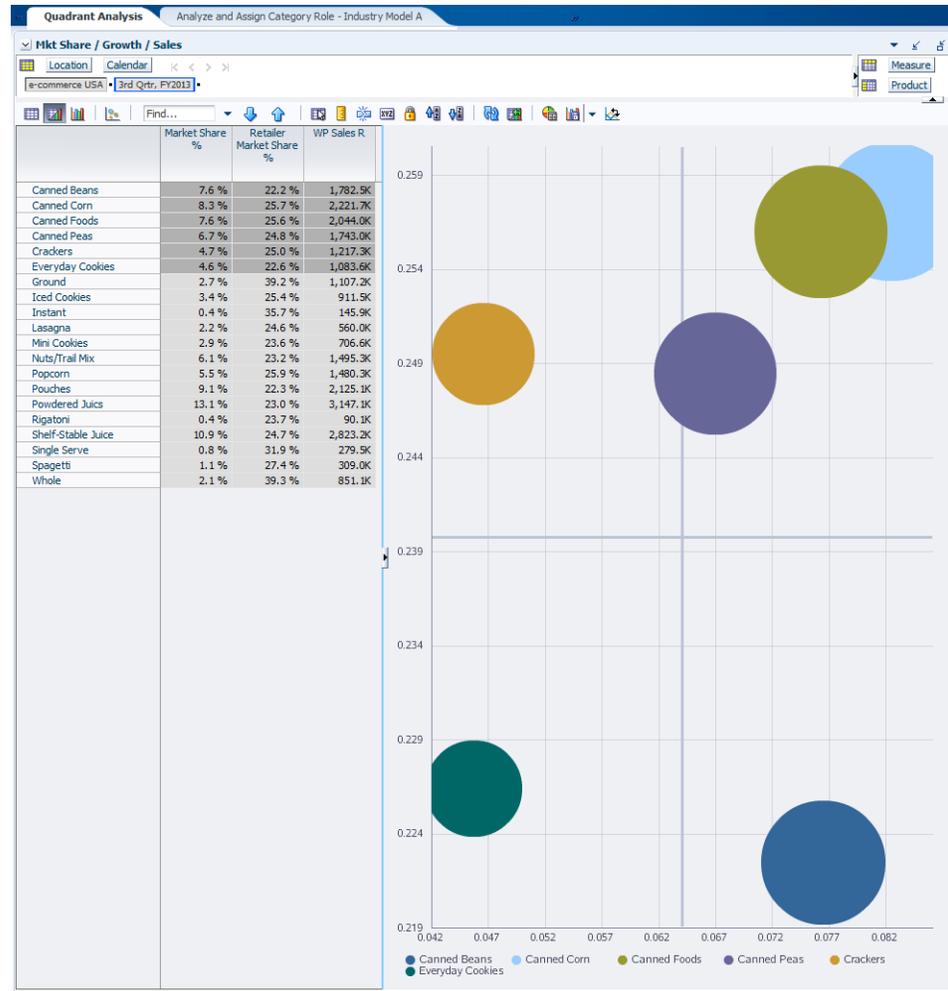*Figure 4–33   Analyze Historic Performance Role - Industry Model B View*

Table 4–24 lists the measures available in this view. The measures are loaded from market scan and retailer data.

Table 4–24   Analyze Historic Performance - Industry Model B Measures

Label	Definition
LY Sales R	Assortment Planning @ Cluster and Category Planning Last Year Sales Retail. Last year sales revenue for the item obtained from a third party. The data is typically obtained quarterly.
LY Gross Profit %	Category Planning and Assortment Planning @ Cluster Last Year Gross Profit Percent. Last year's Retail Sales minus Last Year's Cost of Goods Sold divided by Last Year's Retail Sales.

Analyze Forecasted Performance - Industry Model B View

Use this view to analyze forecasted performance for determining category roles.

This view exists at the following levels:

- Market (a level in the Location dimension)
- Consumer Segment (a level in the Location dimension)
- Category (a level in the Product dimension)

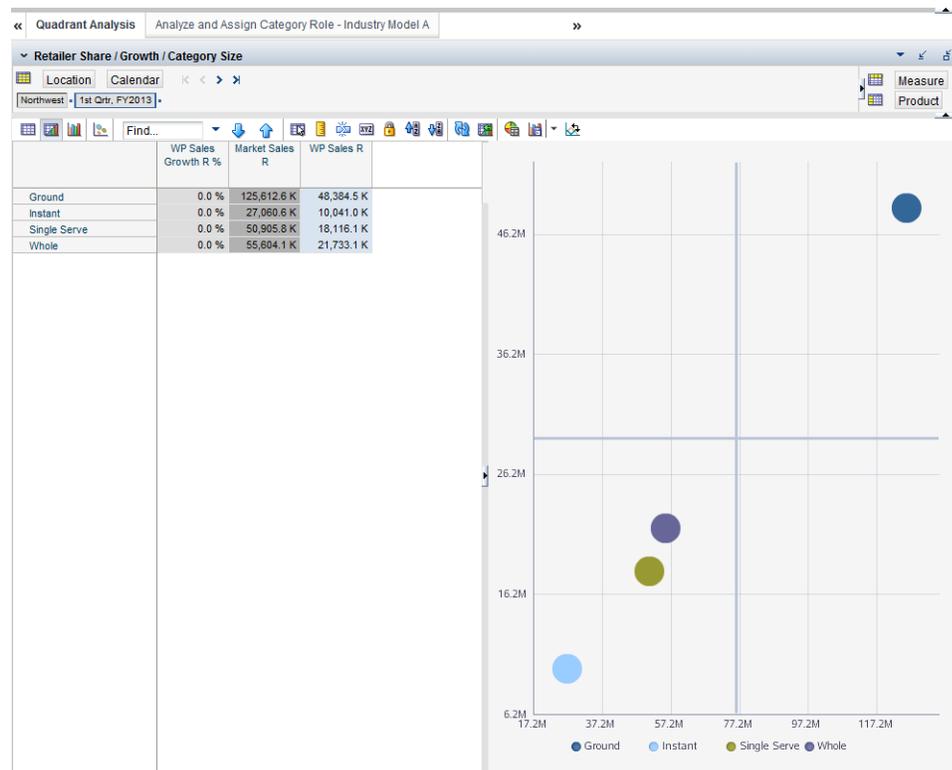*Figure 4–34 Analyze Forecasted Performance - Industry Model B View*
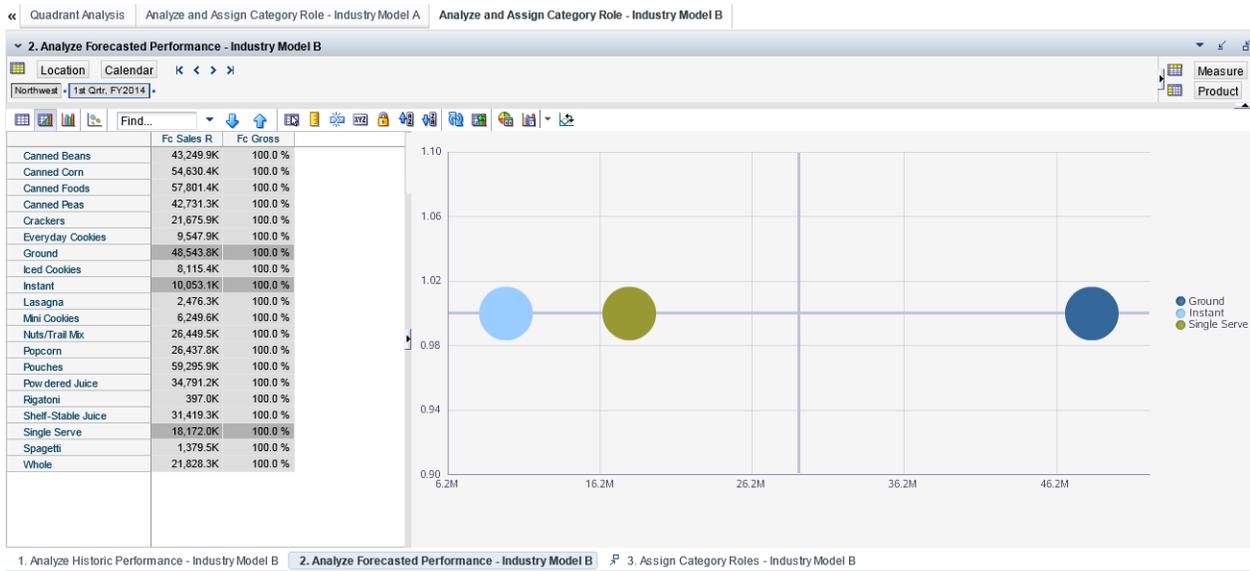
Table 4–25 lists the measures available in this view. The measures are loaded from market scan and retailer data.

*Table 4–25 Analyze Forecasted Performance - Industry Model B Measures*

Label	Definition
Fc Sales R	Category Planning and Assortment Planning @ Cluster Forecast Sales Retail. The sales forecast from Oracle Retail Demand Forecasting in dollars.
Fc Gross Profit %	Category Planning and Assortment Planning @ Cluster Forecasted Gross Profit Percent. The forecasted Retail Sales minus Cost of Goods Sold divided by Retail Sales.

Assign Category Roles - Industry Model B View

Use this view to assign category roles based on historic and forecasted performance. You are able to override the role recommended by the system. These roles drive the preset weights, which are specified in the Category Management Administration task, to help drive the assortment recommendations which best align with the role.

This view is a standard table at the following levels:

- Category (a level in the Product dimension)
- Market (a level in the Location dimension)

Figure 4–35   Assign Category Roles - Industry Model B View

Table 4-35 lists the measures available in this view.

Table 4–26   Assign Category Roles - Industry Model B Measures

Label	Description
LY Recommended Role-Industry Model B	Category Planning Last Year Recommended Role - Industry Model B Text. The system or app recommended role for a category from a Model B perspective in the last financial year's assortment.
Fc Recommended Role-Industry Model B	The forecasted role for a category from a Model B perspective in the last financial year's assortment.
WP Override Role - Industry Model B	Category Planning Working Plan Override Role - Industry Model B Text. An override field giving the user an option to overwrite the category role that is being suggested by Model B being used for category role assignment.
LY Assigned Role - Industry Model B	Category Planning Last Year Assigned Role - Industry Model B Text. The Approved Category Role (Industry Model B) last year.
WP Assigned Role - Industry Model B	Category Planning Working Plan Assigned Role - Industry Model B. The Approved Category Role (Industry Model B).
OP Assigned Role - Industry Model B	Category Planning Original Plan Assigned Role - Industry Model B Text. The Pre-Season Approved Category Role (Industry Model B).

Assign Category Strategies Step

Use this step to evaluate category purchase dynamics and assign appropriate strategies to sub-category/brand. Based on different metrics, you define the role and strategies for each sub-category for each consumer segment.

The following data is required for defining the Assign Category Strategies task:

■   Retailer's POS data

■   Pre-defined category strategies

This step has the following views:

■   Assign Strategies View

■   Identify Cash Generators View

■   Identify Excitement Generators View

- [Identify Image Enhancer View](#)
- [Identify Profit Generators View](#)
- [Identify Traffic Builders View](#)
- [Identify Transaction Builders View](#)
- [Identify Turf-Defenders View](#)

Assign Strategies View

Use this view to assign strategies based on the relevant performance behavior. Assigning Strategies is a key component of calculating and working with IPIs in Assortment Planning. These strategies drive the preset weights, which are specified in the Category Management Administration task, to help drive the assortment recommendations which best align with the role.

Figure 4–36   Assign Strategies View

[Table 4–27](#) lists the measures available in this view.

Table 4–27   Assign Strategies Measures

Label	Definition
LY Strategy Assignment	An historical strategy assignment associated with the category.
WP Strategy Assignment	Category Planning Working Plan Strategy Assignment Text. The strategy being assigned to a category in the new assortment.
OP Strategy Assignment	Category Planning Original Plan Strategy Assignment Text. The strategy being assigned to a category in the new assortment.

Identify Cash Generators View

Use this view to plot shopping frequency versus market turns (sales units). Sub-categories, with a large bubble in the top right corner on the bubble chart, qualify for this strategy. This information is best viewed as a bubble chart.

This view exists at the following level:

- Any static or dynamic level in the Product dimension

Figure 4–37   Identify Cash Generators View

Table 4–28 lists the measures available in this view.

Table 4–28   Identify Cash Generators Measures

Label	Definition
WP Turn	Assortment Planning @ Cluster and Category Planning Working Plan Turn Retail Ratio. The current planned number of times a retailer expects to sell out of its complete inventory in a given period of time.
Purchase Frequency	Category Planning Default Value Purchase Frequency Value. The average number of times each buyer purchases an item over a given time period.
	Purchase Frequency = Total Purchase Occasions # of Buying Households.
WP Sales by Consumer Seg U	Category Planning and Assortment Planning @ Cluster Working Plan Sales by Consumer Segment Units.

Identify Excitement Generators View

Use this view to plot sales dollars as a trend:

- Any sub-category that demonstrates seasonal purchases and is high-impulse and lifestyle-oriented, is flagged as excitement-generating on a scale of excellent versus possible versus poor.

- These attributes are not determined systematically. They are left to the interpretation of the business users.

This information is best viewed as a line chart.

Figure 4–38   Identify Excitement Generators View
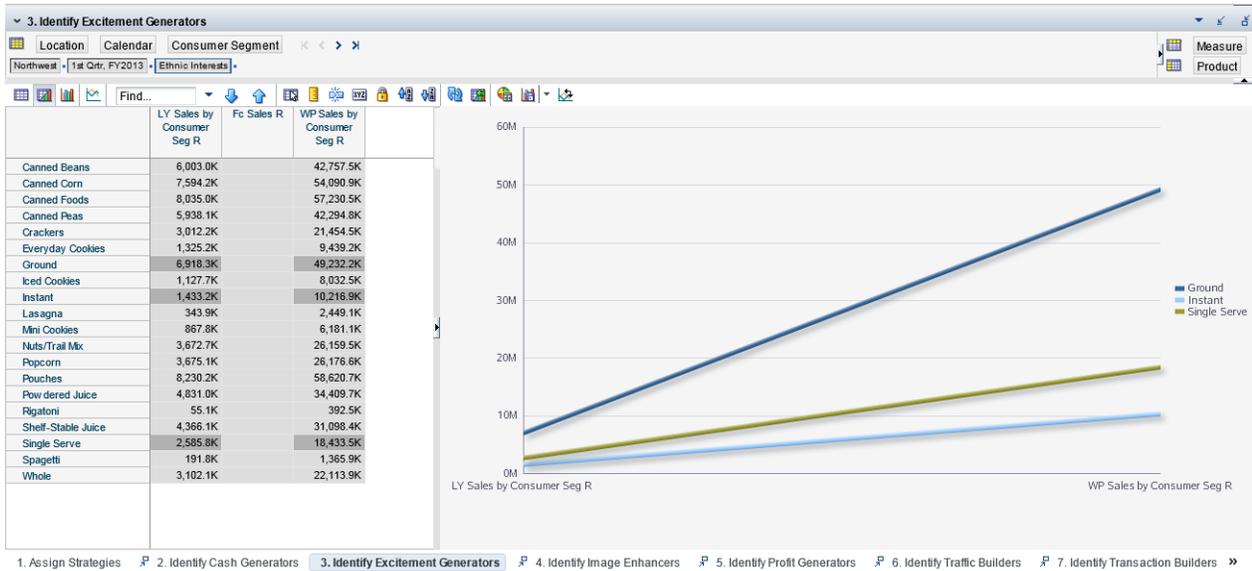
Table 4–29 lists the measures available in this view.

Table 4–29   Identify Excitement Generators Measures

Label	Definition
LY Sales by Consumer Seg R	Category Planning Last Year Sales contribution to Location Retail.
Fc Sales R	Category Planning and Assortment Planning @ Cluster Forecast Sales Retail. The sales forecast from Oracle Retail Demand Forecasting in dollars.
WP Sales by Consumer Seg R	Category Planning and Assortment Planning @ Cluster Working Plan Sales by Consumer Segment Retail.

Identify Image Enhancer View

Use this view to perform quadrant analysis to plot purchase-frequency against Promo % (percentage bought on promotion). Sub-categories, in the top right corner, are flagged as an excellent fit and so on. This information is best viewed as a bubble chart.

This view exists at the following level:

■   Any static or dynamic level in the Product dimension

Figure 4–39   Identify Image Enhancer View
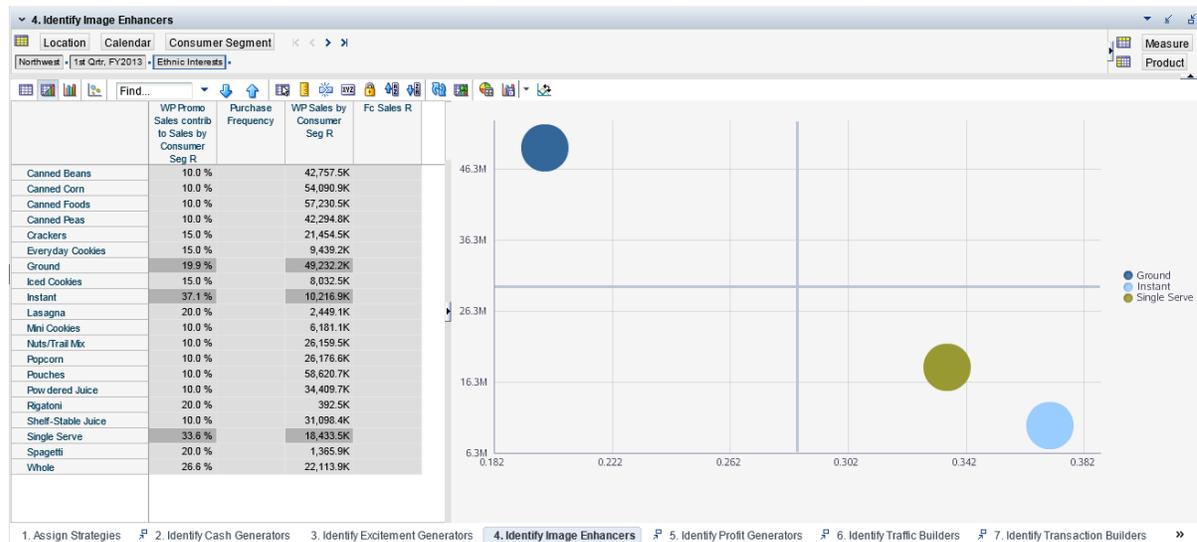
lists the measures available in this view.

Table 4–30   Identify Image Enhancer Measures

Label	Definition
WP Promo Sales contrib to Sales by Consumer Seg R	Category Planning Working Plan Promo Sales by Consumer Segment contribution to Working Plan Sales by Consumer Segment Retail.
Purchase Frequency	Category Planning Default Value Purchase Frequency Value. The average number of times each buyer purchases an item over a given time period.
	Purchase Frequency = Total Purchase Occasions # of Buying Households.
Wp Sales by Consumer Seg R	Category Planning and Assortment Planning @ Cluster Working Plan Sales by Consumer Segment Retail.
Fc Sales R	Category Planning and Assortment Planning @ Cluster Forecast Sales Retail. The sales forecast from Oracle Retail Demand Forecasting in dollars.

Identify Profit Generators View

Use this view to plot histograms for the profit (or GM) percentage of each sub-category. Excellent versus possible versus poor are based on predefined thresholds. This information is best viewed as a column chart.

This view exists at the following level:

- Any static or dynamic level in the Product dimension

Figure 4–40   Identify Profit Generators View
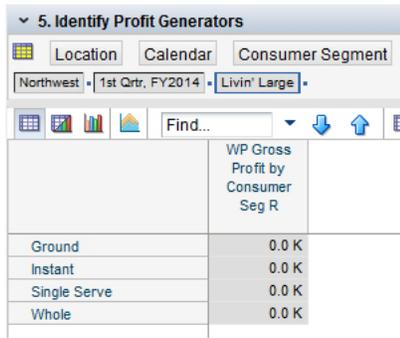
Table 4–31 lists the measures available in this view.

Table 4–31   Identify Profit Generators Measure

Label	Definition
WP Gross Profit by Consumer Seg R	Category Planning Working Plan Gross Profit by Consumer Segment Retail.

Identify Traffic Builders View

Use this view to create a bubble chart to plot market share versus frequency:

■   Sub-categories in the top-right segment and large bubble are considered ideally suited.

■   Based on fit, categories are classified as excellent, possible, or poor.

This information is best viewed as a bubble chart.

This view exists at the following level:

■   Any static or dynamic level in the Product dimension

Figure 4–41   Identify Traffic Builders View
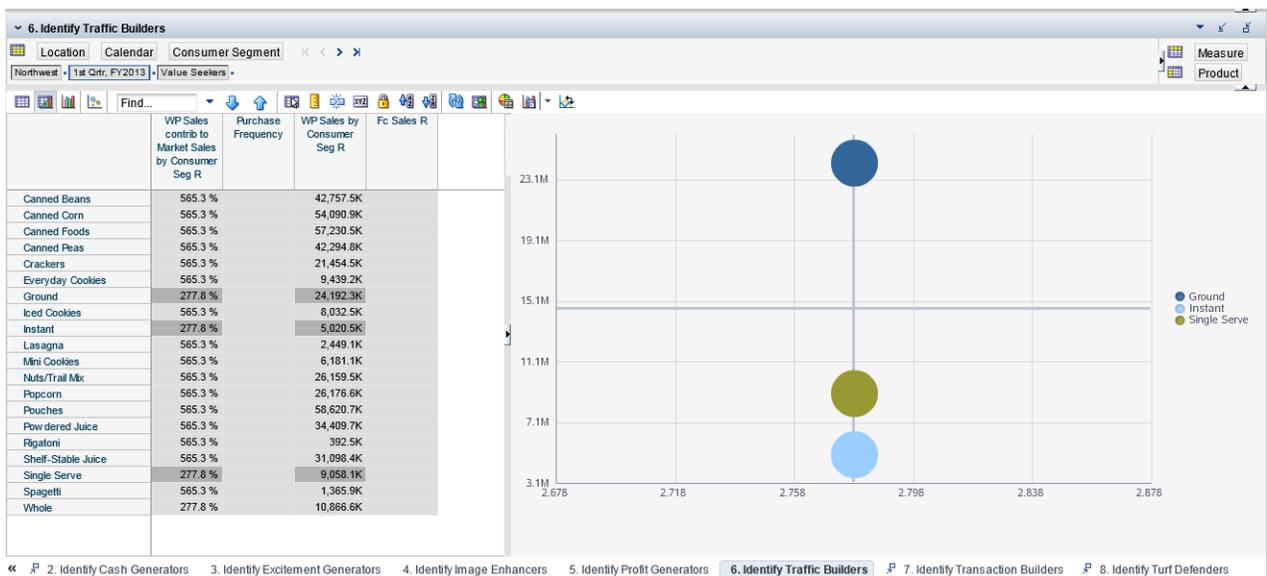
Table 4–32 lists the measures available in this view.

Table 4–32   Identify Traffic Builders Measures

Label	Definition
WP Sales contrib to Market Sales by Consumer Seg R	Category Planning Working Plan Sales contribution to Market Sales by Consumer Segment Retail Percent.
Purchase Frequency	Category Planning Default Value Purchase Frequency Value. The average number of times each buyer purchases an item over a given time period. Purchase Frequency = Total Purchase Occasions # of Buying Households.
WP Sales by Consumer Seg R	Category Planning Working Plan Gross Profit by Consumer Segment Retail.
Fc Sales R	Category Planning and Assortment Planning @ Cluster Forecast Sales Retail. The sales forecast from Oracle Retail Demand Forecasting in dollars.

Identify Transaction Builders View

Use this view to create a bubble chart to plot shopping frequency versus basket value. Sub-categories, with a large bubble in the top right corner, qualify for this strategy. This information is best viewed as a scatter chart.

This view exists at the following level:

- Any static or dynamic level in the Product dimension

Figure 4–42   Identify Transaction Builders View

Table 4–33 lists the measures available in this view.

Table 4–33   Identify Transaction Builders Measures

Label	Definition
Purchase Frequency	Category Planning Default Value Purchase Frequency Value. The average number of times each buyer purchases an item over a given time period. Purchase Frequency = Total Purchase Occasions # of Buying Households.
Transaction Size with Category	Category Planning Default Value Transaction Size with Category Value. The average-bill-amount of all transactions that contained at least 1 item from each of the categories.

Identify Turf-Defenders View

Use this view to plot the retailer's buyer conversion rates against that of the competition. Any sub-categories where the retailer is lagging may be flagged as potentially turf-defending. This information is best viewed as a column chart.

This view exists at the following level:

- Any static or dynamic level in the Product dimension

- Retailer (a level in the Retailer dimension)

- Consumer Segment (a level in the Location dimension)

Figure 4–43   Identify Turf-Defenders View

Table 4–34 lists the measure available in this view.

Table 4–34   Identify Turf-Defenders Measure

Label	Definition
Buyer Conversion Rate	Category Planning and Assortment Planning @ Cluster Default Value Buyer Conversion Rate Value. Indicates the percentage of buyers who shop the sub-category as compared to all shoppers who shop the store.

Assign Category Tactics Step

Use this step to perform deeper assessments within the category for assortment, space, price, promotion, and supply chain. The analytics within this step enable retailers to identify and prioritize opportunities. This step is also used to assign tactics, view historical tactics, and seed tactics from historical views. Tactics are assigned for each of the tactical areas per sub-category, trading area, and consumer segment. There are five tactical areas:

- Assortment

- Inventory

-

- Pricing

- Promotion

- Space

This step contains the majority of the analytics and answers key questions such as the following:

- Consumer:
  - Who buys the category?
  - What percentage buys the category?
  - How frequently do they purchase?
  - How much do they spend?
  - When do they buy the category?
  - What drives their purchases?
  - What else is in their basket?
  - How loyal are they to the category?
- Retailer:
  - How productive are overall sales and profit trends?
  - How productive is the current assortment?
  - How productive is the current pricing?
  - How effective are current promotions?
  - What are the inventory turns and days of supply?
  - What are the profit margins, velocity, and inventory levels?
- Market/Competitor:
  - What are the sales trends of the category in the market?
  - What is the retailer's share?
  - What are the opportunities?
  - How does pricing compare to the competition?
  - How does the assortment compare?
  - How does promotional activity compare?
- Supplier/Brand:
  - What are the sales trends for specific brands?
  - How efficient are profitable are each supplier's brand?
  - How does the retailer's private label contribute to the category and add to their image?
  - How does the retailer's private label compare to national brands?
  - How powerful is the supplier's brand development?

The following data is required for this task:

- Market scan data
- Micro and macro space data
- Pricing data

This step has the following tab and views:

- Review Category Performance to Role Tab:
  - Review Category / Sub-Category Performance View

– Review Price and Promo Effectiveness View

– Review Average Movement View

– Review Space Effectiveness View

Review Category Performance to Role Tab

This tab is used to review category performance. Figure 4–44 shows the views for this tab.

Figure 4–44   Review Category Performance to Role Tab Views
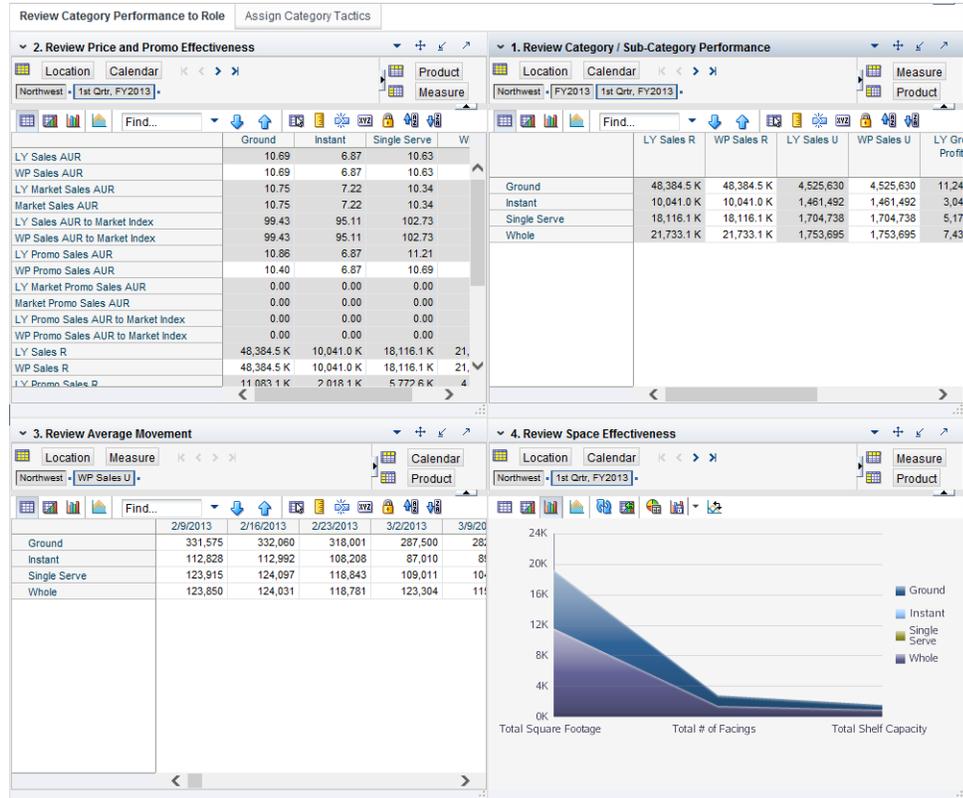
Review Category / Sub-Category Performance View

Use this view to review the performance of the assortment.

Figure 4–45   Review Category / Sub-Category Performance View

Table 4–35 lists the measures available in this view.

Table 4–35   Review Category / Sub-Category Performance Measures

Label	Definition
LY Sales R	Assortment Planning @ Cluster and Category Planning Last Year Sales Retail. Last year sales revenue for the item obtained from a third party. The data is typically obtained quarterly.
Wp Sales R	Assortment Planning @ Cluster and Category Planning Working Plan Sales Retail. The current planned sales revenue for the item.
LY Sales U	Assortment Planning @ Cluster and Category Planning Last Year Sales Retail. The sales units for the retailer from the same period last year obtained from a third party. The data is typically obtained quarterly.
LY Gross Profit R	Assortment Planning @ Cluster and Category Planning Last Year Gross Profit Retail. Last year's Retail Sales minus Last Year's Cost of Goods Sold.
WP Gross Profit R	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit Retail. Used only in IPI calculations. The current Retail Sales minus Last Year's Cost of Goods Sold.
LY Gross Profit %	Category Planning and Assortment Planning @ Cluster Last Year Gross Profit Percent. Last year's Retail Sales minus Last Year's Cost of Goods Sold divided by Last Year's Retail Sales.
WP Gross Profit %	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit Percent. Current approved Retail Sales minus Cost of Goods Sold divided by Retail Sales.

Review Price and Promo Effectiveness View

Use this view to determine how base pricing compares to promotional pricing for the retailer and market. This helps to identify whether the retailer spread is comparable to or different from the market.

The view exists at the following levels:

- Category/Sub-category (a level in the Product dimension)
- Market (a level in the Location dimension)

Figure 4–46   Review Price and Promo Effectiveness View

Table 4–36 lists the measures available in this view.

Table 4–36   Review Price and Promo Effectiveness Measures

Label	Definition
LY Sales AUR	Assortment Planning @ Cluster Category Planning Last Year Sales Average Unit Retail. The average unit retail sales for the retailer from the same period last year - obtained from a third party. The data is typically obtained quarterly.
WP Sales AUR	Category Planning and Assortment Planning @ Cluster Working Plan Sales Average Unit Retail. The current planned sales average unit's retail for the item.
LY Market Sales AUR	Category Planning Last Year Market Sales Average Unit Retail. The average unit retail sales for the Market from the same period last year obtained from a third party. The data is typically obtained quarterly.
Market Sales AUR	Category Planning Default Value Market Sales by Consumer Segment Retail. The current Market average unit's retail for the item.
LY Sales AUR to Market Index	Assortment Planning @ Cluster and Category Planning Last Year Sales Average Unit Retail to Market Sales Average Unit Retail Index.
WP Sales AUR to Market Index	Category Planning Working Plan Sales Average Unit Retail to Market Sales Average Unit Retail Index.
LY Promo Sales AUR	Category Planning and Assortment Planning @ Cluster Last Year Promo Sales Average Unit Retail. Last year's promotional sales average unit's retail for the item.

Table 4–36 (Cont.) Review Price and Promo Effectiveness Measures

Label	Definition
WP Promo Sales AUR	Category Planning and Assortment Planning @ Cluster Working Plan Sales Average Unit Retail. The current planned promotional sales average unit's retail for the item.
Market Promo Sales AUR	Category Planning Default Value Market Promo Sales Average Unit Retail. The Market promotional sales average unit's retail for the item.
LY Promo Sales AUR to Market Index	Category Planning Last Year Promotional Sales Average Unit Retail to Market Sales Average Unit.
WP Promo Sales AUR to Market Index	Category Planning Working Plan Promotional Sales Average Unit Retail to Market Sales Average Unit Retail Index.
LY Sales R	Assortment Planning @ Cluster and Category Planning Last Year Sales Retail. Last year sales revenue for the item obtained from a third party. The data is typically obtained quarterly.
WP Sales R	Assortment Planning @ Cluster and Category Planning Working Plan Sales Retail. The current planned sales revenue for the item.
LY Promo Sales R	Category Planning and Assortment Planning @ Cluster. Last Year Promo Sales Retail. Last year sales revenue due to a promotion for the item obtained from a third party. The data is typically obtained quarterly.
WP Promo Sales R	Category Planning and Assortment Planning @ Cluster Working Plan Promotional Sales Retail. Current approved Promotional sales revenue for the item obtained from a third party. The data is typically obtained quarterly.
LY Market Sales R	Assortment Planning @ Cluster and Category Planning Last Year Market Sales Retail. Last year's sales revenue for the item by retailer, obtained from a third party. The data is typically obtained quarterly.
Market Sales R	Category Planning and Assortment Planning @ Cluster Default Value Market Sales Retail. The sales revenue for the item by retailer, obtained from a third party. The data is typically obtained quarterly.
LY Market Promo Sales R	Category Planning Last Year Market Promo Sales Retail. Last year's promotional sales revenue for the item by retailer, obtained from a third party. The data is typically obtained quarterly.
Market Promo Sales R	Category Planning Default Value Market Promo Sales Retail. Promotional sales revenue for the item by retailer, obtained from a third party. The data is typically obtained quarterly.
LY Gross Profit R	Assortment Planning @ Cluster and Category Planning Last Year Gross Profit Retail. Last year's Retail Sales minus Last Year's Cost of Goods Sold.
LY Gross Profit %	Category Planning and Assortment Planning @ Cluster Last Year Gross Profit Percent. Last year's Retail Sales minus Last Year's Cost of Goods Sold divided by Last Year's Retail Sales.
WP Gross Profit R	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit Retail. Used only in IPI calculations. The current Retail Sales minus Last Year's Cost of Goods Sold.
Wp Gross Profit %	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit Percent. Current approved Retail Sales minus Cost of Goods Sold divided by Retail Sales.

Review Average Movement View

This view is related to promotional effectiveness and shows the sales units for a category over time. It can be used to identify and review seasonality. This information is best displayed as a line chart.

Figure 4–47   Review Average Movement View
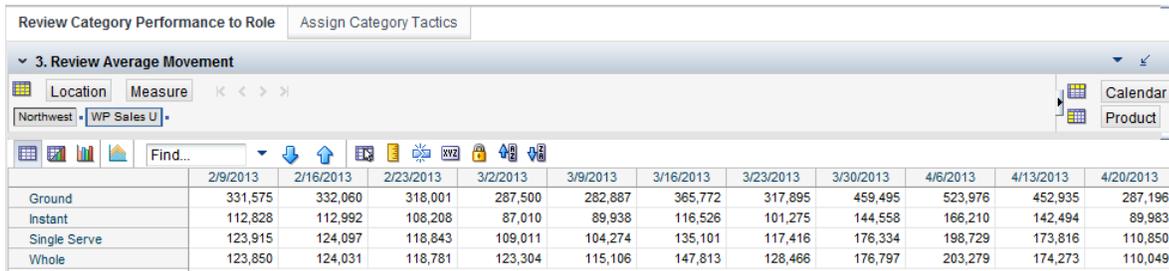
Table 4–37 lists the measure available in this view.

Table 4–37   Review Average Movement Measure

Label	Definition
Wp Sales U	Assortment Planning @ Cluster and Category Planning Working Plan Sales Units. The current planned sales units for the item.

Review Space Effectiveness View

Use this view to review the effectiveness of the planned space. All measures are optional and based on whether the retailer has the space planning data available.

Figure 4–48   Review Space Effectiveness View
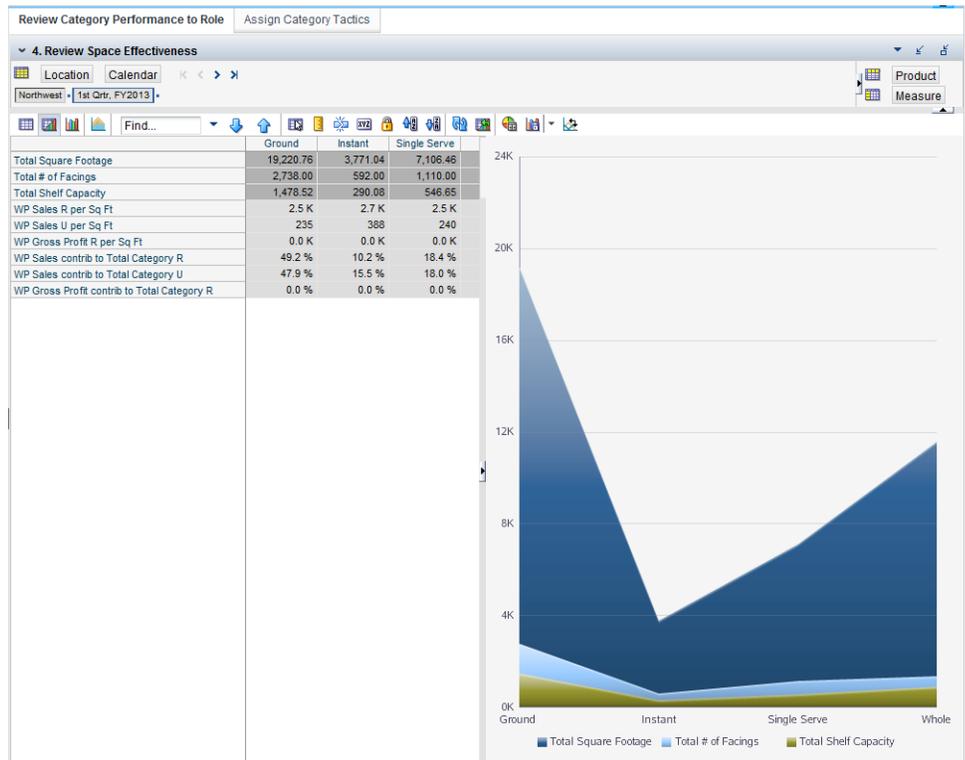
Table 4–38 lists the measures available in this view.

Table 4–38   Review Space Effectiveness Measures

Label	Definition
Total Square Footage	The space allocation to a product dimension (includes vendor and brand as well) or to a vendor with a volume perspective in cubic feet.
Total #of Facings	The Product main side on a shelf. By counting the number of facings, it is possible to assess the visibility of a product in a store.
Total Shelf Capacity	Category Planning Default Value Total Shelf Capacity Value. The quantity of an item (or in general a product dimension) that can fit into the overall space allocated to it.
WP Sales R per Sq Ft	Category Planning and Assortment Planning @ Cluster Working Plan Sales per Square Foot Retail. Represents the space allocation in dollars to a product dimension (includes vendor and brand as well) or to a vendor with a volume perspective in cubic feet.
WP Sales U per Sq Ft	Category Planning and Assortment Planning @ Cluster Working Plan Sales Units. The planned sales units for a product dimension divided by the cubic feet allocated to that particular product dimension. The planned sales units for a product dimension divided by the cubic feet allocated to that particular product dimension. Represents the space allocation in units to a product dimension (includes vendor and brand as well) or to a vendor with a volume perspective in cubic feet.
Wp Gross Profit R per Sq Ft	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit per Square Foot Retail. The planned gross profit for a product dimension divided by the square feet allocated to that particular product dimension.
WP Sales contrib to Total Category R	Assortment Planning @ Cluster and Category Planning Working Plan Sales contribution to Total Category Retail.
WP Sales contrib to Total Category U	Assortment Planning @ Cluster and Category Planning Working Plan Sales contribution to Total Category Units.
WP Gross Profit contrib to Total Category R	Category Planning and Assortment Planning @ Cluster Working Plan Sales contribution to Total Category Retail. The contribution to gross profit by an item (or a product dimension) to the overall sales value/revenue.

Assign Category Tactics Tab

This tab is used to assign category tactics.

Assign Category Tactics View

Use this view to assign tactics for each of the tactical areas per category, market, and consumer segment. These tactics drive the preset weights, which are specified in the Category Management Administration task, to help drive the assortment recommendations which best align with the role.

Figure 4–49   Review Space Effectiveness View
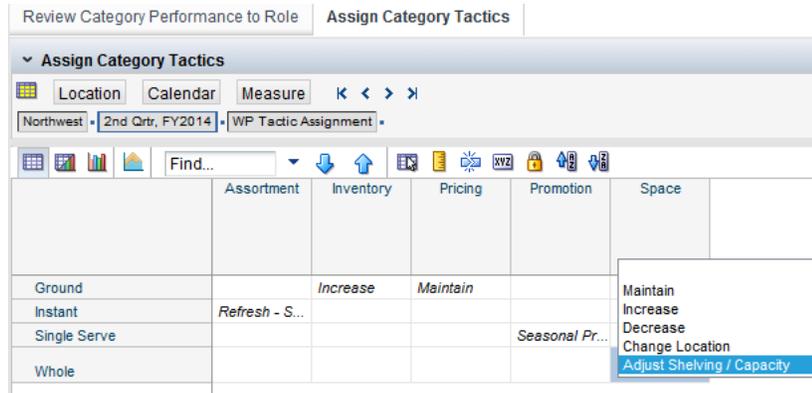
Table 4–39 lists the measure available in this view.

Table 4–39   Assign Category Tactic Measure

Label	Definition
WP Tactic Assignment	Category Planning Working Plan Tactic Assignment Text. The Assignment of Tactics to a category keeping the role and strategy assigned to that category in mind. Tactics refer to the approach or way forward for a category in terms of assortment range, inventory levels, pricing, promotion, space, and so on.

Set Targets and Approve Category Plan Step

This is the final step in the Category Planning task and it consists of setting the final targets in terms of various retail business measures (like Sales, Gross Profit, Inventory, and so on) at the category and sub-category level and formally approving them. On approval, the category plan is conveyed to the Assortment Planning task as target data (Tgt measures). In Category Planning, the final plan is stored as an Original Plan (OP). These final targets are further defined as Private Label Targets and Promo Sales Targets. This step also contains a dashboard view to see performance against targets and LY data during in-season and pre-season planning periods. This step also provides a facility to initially seed the category plan sales using LY data. Use this step to derive the final category plan.

This step contains the following tabs and views:

- Scorecard Summary View

- Seed and Review Plan Sales Tab:

    - Review Sales View

    - Seed Sales View

- Set Sales and Profit Targets Tab:

    - Set Sales and Profit Targets View

    - Set Promo Sales Targets View

    - Set Private Label Targets View

- Set Inventory Targets Tab:

    - Set Inventory Targets View

- Approve Assortment Strategies, Tactics, and Scorecard View

This step also contains the following custom menu options:

- Seed Sales

- Approve OP

Scorecard Summary View

This step has one view, Scorecard Summary. Use this view to see the summary of the scorecard.

The Scorecard Summary view also contains three measure profiles:

- Private Label

- Promo Stores

- Sales

Figure 4–50   Scorecard Summary Sales Measure Profile View

Table 4–40 lists the measures available in the Sales Measure Profile View.

Table 4–40   Scorecard Summary Sales Measure Profile Measures

Label	Definition
LY Sales R	Assortment Planning @ Cluster and Category Planning Last Year Sales Retail. Last year sales revenue for the item obtained from a third party. The data is typically obtained quarterly.
WP Sales R	Assortment Planning @ Cluster and Category Planning Working Plan Sales Retail. The current planned sales revenue for the item.
WP Sales var to LY R	Assortment Planning @ Cluster and Category Planning Working Plan Sales variance to Last Year Retail.

Table 4–40   (Cont.) Scorecard Summary Sales Measure Profile Measures

Label	Definition
OP Sales R	Category Planning and Assortment Planning @ Cluster Original Plan Sales Retail. The Pre-Season planned sales revenue for the item.
OP Sales var to LY R	Category Planning Original Plan Promo Sales variance to Last Year Retail.
LY Gross Profit R	Assortment Planning @ Cluster and Category Planning Last Year Gross Profit Retail. Last year's Retail Sales minus Last Year's Cost of Goods Sold.
LY Gross Profit %	Category Planning and Assortment Planning @ Cluster Last Year Gross Profit Percent. Last year's Retail Sales minus Last Year's Cost of Goods Sold divided by Last Year's Retail Sales.
WP Gross Profit R	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit Retail. Used only in IPI calculations. The current Retail Sales minus Last Year's Cost of Goods Sold.
WP Gross Profit %	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit Percent. Current approved Retail Sales minus Cost of Goods Sold divided by Retail Sales.
WP Gross Profit var to LY R	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit variance to Last Year Retail.
OP Gross Profit R	Category Planning and Assortment Planning @ Cluster Original Plan Gross Profit Retail The Pre-Season Planned Retail Sales minus Last Year's Cost of Goods Sold.
OP Gross Profit %	Assortment Planning @ Cluster Original Plan Private Label Gross Profit Percent. Pre-Season approved Retail Sales minus Cost of Goods Sold divided by Retail Sales.
OP Gross Profit var to LY	Category Planning Original Plan Gross Profit variance to Last Year Retail.
LY Avg Inv R	Category Planning and Assortment Planning @ Cluster Last Year Average Inventory Retail.
WP Avg Inv R	Category Planning and Assortment Planning @ Cluster Working Plan Average Inventory Retail.
OP Avg Inv R	Assortment Planning @ Cluster and Category Planning Original Plan Average Inventory Retail.
LY Turn	Category Planning and Assortment Planning @ Cluster Last Year Turn Retail Ratio.
WP Turn	Assortment Planning @ Cluster and Category Planning Working Plan Turn Retail Ratio. The current planned number of times a retailer expects to sell out of its complete inventory in a given period of time.
OP Turn	Category Planning and Assortment Planning @ Cluster Original Plan Turn Retail Ratio. The Pre-Season approved number of times a retailer expects to sell out of its complete inventory in a given period of time.

Figure 4–51   Scorecard Summary Promo Sales Measure Profile View

Table 4–41 lists the measures available in the Promo Sales Measure Profile View.

Table 4–41   Scorecard Summary Promo Sales Measure Profile Measures

Label	Definition
LY Sales R	Assortment Planning @ Cluster and Category Planning Last Year Sales Retail. Last year sales revenue for the item obtained from a third party. The data is typically obtained quarterly.
WP Sales R	Assortment Planning @ Cluster and Category Planning Working Plan Sales Retail. The current planned sales revenue for the item.
WP Sales var to LY R	Assortment Planning @ Cluster and Category Planning Working Plan Sales variance to Last Year Retail.
OP Sales R	Category Planning and Assortment Planning @ Cluster Original Plan Sales Retail. The Pre-Season planned sales revenue for the item.
OP Sales var to LY R	Category Planning Original Plan Promo Sales variance to Last Year Retail.
LY Promo Sales R	Category Planning and Assortment Planning @ Cluster. Last Year Promo Sales Retail. Last year sales revenue due to a promotion for the item obtained from a third party. The data is typically obtained quarterly.
LY Promo Sales contrib to LY R	Assortment Planning @ Cluster Last Year Promo Sales contribution to Last Year Retail.
Wp Promo Sales R	Category Planning and Assortment Planning @ Cluster Working Plan Promotional Sales Retail. Current approved Promotional sales revenue for the item obtained from a third party. The data is typically obtained quarterly.

Table 4–41   (Cont.) Scorecard Summary Promo Sales Measure Profile Measures

Label	Definition
WP Promo Sales contrib to WP Sales R	Category Planning and Assortment Planning @ Cluster Working Plan Promo Sales contribution to Working Plan Retail. Represents the contribution to promotional sales by an item (or a product dimension) to the overall sales value/revenue.
WP Promo Sales var to LY R	Category Planning and Assortment Planning @ Cluster Working Plan Promo Sales variance to Last Year Retail.
OP Promo Sales R	Category Planning and Assortment Planning @ Cluster Original Plan Promo Sales Retail. Pre-Season planned sales revenue for the item obtained from a third party. The data is typically obtained quarterly.
OP Promo Sales contrib to OP Sales R	Category Planning and Assortment Planning @ Cluster Original Plan Promo Sales contribution to Original Plan Retail.
OP Promo Sales var to LY R	Category Planning and Assortment Planning @ Cluster Working Plan Promo Sales variance to Last Year Retail.
LY Gross Profit R	Assortment Planning @ Cluster and Category Planning Last Year Gross Profit Retail. Last year's Retail Sales minus Last Year's Cost of Goods Sold.
LY Gross Profit %	Category Planning and Assortment Planning @ Cluster Last Year Gross Profit Percent. Last year's Retail Sales minus Last Year's Cost of Goods Sold divided by Last Year's Retail Sales.
WP Gross Profit R	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit Retail. Used only in IPI calculations. The current Retail Sales minus Last Year's Cost of Goods Sold.
WP Gross Profit %	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit Percent. Current approved Retail Sales minus Cost of Goods Sold divided by Retail Sales.
WP Gross Profit var to LY	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit variance to Last Year Retail.
OP Gross Profit R	Category Planning and Assortment Planning @ Cluster Original Plan Gross Profit Retail The Pre-Season Planned Retail Sales minus Last Year's Cost of Goods Sold.
OP Gross Profit %	Assortment Planning @ Cluster Original Plan Private Label Gross Profit Percent. Pre-Season approved Retail Sales minus Cost of Goods Sold divided by Retail Sales.
OP Gross Profit var to LY	Category Planning Original Plan Gross Profit variance to Last Year Retail.

Figure 4–52   Scorecard Summary Private Label Measure Profile View

Table 4–42 lists the measures available in the Private Label Measure Profile View.

Table 4–42   Scorecard Summary Private Label Measure Profile Measures

Label	Definition
LY Sales R	Assortment Planning @ Cluster and Category Planning Last Year Sales Retail. Last year sales revenue for the item obtained from a third party. The data is typically obtained quarterly
WP Sales R	Assortment Planning @ Cluster and Category Planning Working Plan Sales Retail. The current planned sales revenue for the item.
WP Sales var to LY R	Assortment Planning @ Cluster and Category Planning Working Plan Sales variance to Last Year Retail.
OP Sales R	Category Planning and Assortment Planning @ Cluster Original Plan Sales Retail. The Pre-Season planned sales revenue for the item.
OP Sales var to LY R	Category Planning Original Plan Promo Sales variance to Last Year Retail.
LY Private Label Sales R	Category Planning and Assortment Planning @ Cluster and Category Planning Last Year Private Label Sales Retail. The Sales dollars for the retailer brand during the last fiscal year.
LY Private Label Sales contrib to LY	Category Planning and Assortment Planning @ Cluster Last Year Promo Sales contribution to Last Year Retail.

Table 4–42   (Cont.) Scorecard Summary Private Label Measure Profile Measures

Label	Definition
Wp Private Label Sales R	Category Planning and Assortment Planning @ Cluster Working Plan Private Label Sales Retail. Current approved planned sales revenue for the retailer brand.
WP Private Label Sales contrib to WP Sales R	Category Planning and Assortment Planning @ Cluster Working Plan Private Label Sales contribution to Working Plan Sales Retail
WP Private Label Sales var to LY R	Category Planning and Assortment Planning @ Cluster Working Plan Private Label Sales variance to Last Year Retail
OP Private Label Sales R	Category Planning and Assortment Planning @ Cluster Original Plan Private Label Sales Retail. Pre-Season planned sales revenue for the retailer brand obtained from a third party. The data is typically obtained quarterly.
OP Private Label Sales contrib to OP Sales R	Category Planning and Assortment Planning @ Cluster. Original Plan Private Label Sales contribution to Original Plan Sales Retail.
OP Private Label Sales var to LY R	Category Planning and Assortment Planning @ Cluster Original Plan Private Label Sales variance to Last Year Retail.
LY Gross Profit R	Assortment Planning @ Cluster and Category Planning Last Year Gross Profit Retail. Last year's Retail Sales minus Last Year's Cost of Goods Sold.
LY Gross Profit %	Category Planning and Assortment Planning @ Cluster Last Year Gross Profit Percent. Last year's Retail Sales minus Last Year's Cost of Goods Sold divided by Last Year's Retail Sales.
WP Gross Profit R	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit Retail. Used only in IPI calculations. The current Retail Sales minus Last Year's Cost of Goods Sold.
WP Gross Profit %	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit Percent. Current approved Retail Sales minus Cost of Goods Sold divided by Retail Sales.
WP Gross Profit var to LY	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit variance to Last Year Retail.
OP Gross Profit R	Category Planning and Assortment Planning @ Cluster Original Plan Gross Profit Retail The Pre-Season Planned Retail Sales minus Last Year's Cost of Goods Sold.
OP Gross Profit %	Assortment Planning @ Cluster Original Plan Private Label Gross Profit Percent. Pre-Season approved Retail Sales minus Cost of Goods Sold divided by Retail Sales.
OP Gross Profit var to LY	Category Planning Original Plan Gross Profit variance to Last Year Retail.
LY Private Label Gross Profit R	Assortment Planning @ Cluster and Category Planning Last Year Gross Profit Retail. Last year's Retail Sales minus Last Year's Cost of Goods Sold for the retailer brand.
LY Private Label Gross Profit %	Category Planning and Assortment Planning @ Cluster Last Year Gross Profit Percent. Last year's Retail Sales minus Last Year's Cost of Goods Sold divided by Last Year's Retail Sales for the retailer brand.
WP Private Label Gross Profit R	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit Retail. Used only in IPI calculations. The current Retail Sales minus Last Year's Cost of Goods Sold for the retailer brand.

Table 4–42   (Cont.) Scorecard Summary Private Label Measure Profile Measures

Label	Definition
WP Private Label Gross Profit %	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit Percent. Current approved Retail Sales minus Cost of Goods Sold divided by Retail Sales for the retailer brand.
WP Private Label Gross Profit var to LY R	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit variance to Last Year Retail for the retailer brand.
OP Private Label Gross Profit R	Category Planning and Assortment Planning @ Cluster Original Plan Gross Profit Retail The Pre-Season Planned Retail Sales minus Last Year's Cost of Goods Sold for the retailer brand.
OP Private Label Gross Profit %	Assortment Planning @ Cluster Original Plan Private Label Gross Profit Percent. Pre-Season approved Retail Sales minus Cost of Goods Sold divided by Retail Sales for the retailer brand.
OP Private Label Gross Profit var to LY	Category Planning Original Plan Gross Profit variance to Last Year Retail for the retailer brand.

Seed and Review Plan Sales Tab

This tab is used to seed and review plan sales.

Custom Menu

There is a custom menu available on this tab called Seed Sales. You select the desired data source in the Seed Source column. The choices are No Action, Forecast, and Last Year. The appropriate values are copied into the Sales and Sales Units columns.

This tab has two views:

■   Review Sales

■   Seed Sales

Review Sales View

Use this view to review LY Sales against the WP Sales. However, WP Sales are set only in the next few worksheets. This view presents LY and WP measures for Sales U and Sales R at the overall sales level, Private Label level and Promo Sales level.

Figure 4–53   Review Sales View

Table 4–43 lists the measures available in this view.

Table 4–43   Review Sales Measures

Label	Definition
LY Sales R	Assortment Planning @ Cluster and Category Planning Last Year Sales Retail. Last year sales revenue for the item obtained from a third party. The data is typically obtained quarterly.
LY Sales U	Assortment Planning @ Cluster and Category Planning Last Year Sales Retail. The sales units for the retailer from the same period last year obtained from a third party. The data is typically obtained quarterly.
LY Private Label Sales R	Category Planning and Assortment Planning @ Cluster Last Year Private Label Sales Retail. The Sales dollars for the retailer brand during the last fiscal year.
LY Private Label Sales U	Assortment Planning @ Cluster and Category Planning Last Year Private Label Sales Units. The Sales units for the retailer brand during the last fiscal year.
LY Promo Sales R	Category Planning and Assortment Planning @ Cluster. Last Year Proo Sales Retail. Last year sales revenue due to a promotion for the item obtained from a third party. The data is typically obtained quarterly.
LY Promo Sales U	Category Planning and Assortment Planning @ Cluster Last Year Promo Sales Units. Last year sales units due to a promotion for the item obtained from a third party. The data is typically obtained quarterly.

Seed Sales View

Use this view to seed the initial WP plan with LY plan used to derive the final category plan as an Original Plan (OP).

Figure 4–54   Seed Sales View
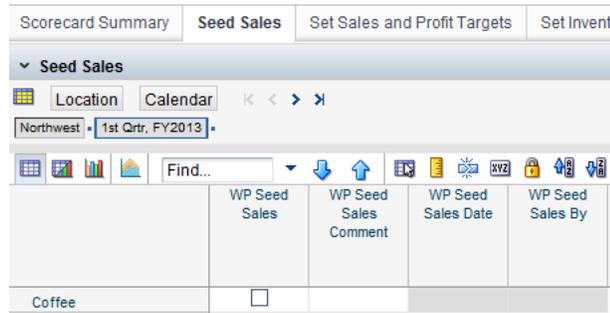
Table 4–44 lists the measures available in this view.

Table 4–44   Seed Sales Measures

Label	Definition
Wp Seed Sales	Category Planning and Assortment Planning @ Cluster Working Plan Seed Sales Boolean. A Boolean measure to flag a category for seeding.
WP Seed Sales Comments	Category Planning Working Plan Seed Sales Comments. User notes related to seeding.
WP Seed Sales Date	Category Planning Working Plan Seed Sales Date. The date that seeding is implemented.

Table 4–44   (Cont.) Seed Sales Measures

Label	Definition
WP Seed Sales By	Category Planning Working Plan Seed Sales User. The user ID of the user initiating seeding.

Set Sales and Profit Targets Tab

This tab has three views:

- Set Sales and Profit Targets View
- Set Promo Sales Targets View
- Set Private Label Targets View

Set Sales and Profit Targets View

Use this view to set the sales and profit targets at the total category level.

Figure 4–55   Set Sales and Profit Targets View

Table 4–45 lists the measures available in this view.

Table 4–45   Set Sales and Profit Targets Measures

Label	Definition
FC Sales R	Category Planning and Assortment Planning @ Cluster Forecast Sales Retail. The sales forecast from Oracle Retail Demand Forecasting in dollars.

Table 4–45   (Cont.) Set Sales and Profit Targets Measures

Label	Definition
WP Sales R	Assortment Planning @ Cluster and Category Planning Working Plan Sales Retail. The current planned sales revenue for the item.
LY Sales R	Assortment Planning @ Cluster and Category Planning Last Year Sales Retail. Last year sales revenue for the item obtained from a third party. The data is typically obtained quarterly.
WP Sales var to LY R	Assortment Planning @ Cluster and Category Planning Working Plan Sales variance to Last Year Retail.
Wp Sales var to Fc R	Category Planning Working and Assortment Planning @ Cluster Plan Sales variance to Forecast Retail.
LY Sales contrib to Product R	Category Planning Last Year Sales contribution to Product Retail.
WP Sales contrib to Product R	Category Planning Working Plan Sales contribution to product Retail.
LY Sales contrib to Location R	Category Planning Last Year Sales contribution to Location Retail.
WP Sales contrib to Location R	Category Planning Working Plan Sales contribution to Location Retail.
LY Sales U	Assortment Planning @ Cluster and Category Planning Last Year Sales Retail. The sales units for the retailer from the same period last year obtained from a third party. The data is typically obtained quarterly.
LY Sales AUR	Assortment Planning @ Cluster Category Planning Last Year Sales Average Unit Retail. The average unit retail sales for the retailer from the same period last year - obtained from a third party. The data is typically obtained quarterly.
WP Sales U	Assortment Planning @ Cluster and Category Planning Working Plan Sales Units. The current planned sales units for the item.
WP Sales AUR	Category Planning and Assortment Planning @ Cluster Working Plan Sales Average Unit Retail. The current planned sales average unit's retail for the item.
WP Sales Var to LY U	Assortment Planning @ Cluster and Category Planning Working Plan Sales variance to Last Year Units.
Fc Sales U	Category Planning Forecast Sales Units. The sales unit forecast from Oracle Retail Demand Forecasting.
Fc Sales AUR	Category Planning and Assortment Planning @ Cluster Forecast Sales Average Units Retail. The Sales average units retail forecast from Oracle Retail Demand Forecasting.
LY Gross Profit R	Assortment Planning @ Cluster and Category Planning Last Year Gross Profit Retail. Last year's Retail Sales minus Last Year's Cost of Goods Sold.
LY Gross Profit %	Category Planning and Assortment Planning @ Cluster Last Year Gross Profit Percent. Last year's Retail Sales minus Last Year's Cost of Goods Sold divided by Last Year's Retail Sales.
WP Gross Profit R	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit Retail. Used only in IPI calculations. The current Retail Sales minus Last Year's Cost of Goods Sold.
WP Gross Profit %	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit Percent. Current approved Retail Sales minus Cost of Goods Sold divided by Retail Sales.

Table 4–45   (Cont.) Set Sales and Profit Targets Measures

Label	Definition
WP Gross Profit var to LY R	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit variance to Last Year Retail.
LY Sales R per Sq Ft	Category Planning and Assortment Planning @ Cluster Last Year Sales per Square Foot Retail. Last Year's planned sales value/revenue for a product dimension divided by the square feet allocated to that particular product dimension.
WP Sales R per Sq Ft	Category Planning and Assortment Planning @ Cluster Working Plan Sales per Square Foot Retail. Represents the space allocation in dollars to a product dimension (includes vendor and brand as well) or to a vendor with a volume perspective in cubic feet.
LY Gross Profit R per Sq Ft	Assortment Planning @ Cluster and Category Planning Last Year Gross Profit per Square Foot Retail. Last year's gross profit for a product dimension divided by the square feet allocated to that particular product dimension.
WP Gross Profit R per Sq Ft	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit per Square Foot Retail. The planned gross profit for a product dimension divided by the square feet allocated to that particular product dimension.

Set Promo Sales Targets View

Use this view to set the scorecard targets for inventory.

Figure 4–56   Set Promo Sales Targets View

[Table 4–46](#) lists the measures available in this view.

Table 4–46   Set Promo Sales Targets Measures

Label	Definition
LY Sales R	Assortment Planning @ Cluster and Category Planning Last Year Sales Retail. Last year sales revenue for the item obtained from a third party. The data is typically obtained quarterly.
LY Promo Sales R	Category Planning and Assortment Planning @ Cluster. Last Year Promo Sales Retail. Last year sales revenue due to a promotion for the item obtained from a third party. The data is typically obtained quarterly.
LY Promo Sales contrib to LY Sales R	Assortment Planning @ Cluster and Category Planning Last Year Promo Sales contribution to Last Year Retail.
Fc Sales R	Category Planning and Assortment Planning @ Cluster Forecast Sales Retail. The sales forecast from Oracle Retail Demand Forecasting in dollars.
WP Sales R	Assortment Planning @ Cluster and Category Planning Working Plan Sales Retail. The current planned sales revenue for the item.

Table 4–46   (Cont.) Set Promo Sales Targets Measures

Label	Definition
WP Promo Sales R	Category Planning and Assortment Planning @ Cluster Working Plan Promotional Sales Retail. Current approved Promotional sales revenue for the item obtained from a third party. The data is typically obtained quarterly.
WP Promo Sales contrib to WP Sales R	Category Planning and Assortment Planning @ Cluster Working Plan Promo Sales contribution to Working Plan Retail. Represents the contribution to promotional sales by an item (or a product dimension) to the overall sales value/revenue.
WP Promo Sales var to LY R	Category Planning and Assortment Planning @ Cluster Working Plan Promo Sales variance to Last Year Retail.
LY Sales U	Assortment Planning @ Cluster and Category Planning Last Year Sales Retail. The sales units for the retailer from the same period last year obtained from a third party. The data is typically obtained quarterly.
LY Sales AUR	Assortment Planning @ Cluster Category Planning Last Year Sales Average Unit Retail. The average unit retail sales for the retailer from the same period last year obtained from a third party. The data is typically obtained quarterly.
LY Promo Sales U	Category Planning and Assortment Planning @ Cluster Last Year Promo Sales Units. Last year sales units due to a promotion for the item obtained from a third party. The data is typically obtained quarterly.
Fc Sales U	Category Planning Forecast Sales Units. The sales unit forecast from Oracle Retail Demand Forecasting.
Fc Sales AUR	Category Planning and Assortment Planning @ Cluster Forecast Sales Average Units Retail. The Sales average units retail forecast from Oracle Retail Demand Forecasting.
WP Sales U	Assortment Planning @ Cluster and Category Planning Working Plan Sales Units. The current planned sales units for the item.
LY Promo Sales AUR	Category Planning and Assortment Planning @ Cluster Last Year Promo Sales Average Unit Retail. Last year's promotional sales average unit's retail for the item.
WP Sales AUR	Category Planning and Assortment Planning @ Cluster Working Plan Sales Average Unit Retail. The current planned promotional sales average unit's retail for the item.
WP Promo Sales U	Category Planning and Assortment Planning @ Cluster Working Plan Promotional Sales Units. The current planned promotional sales units for the item.
WP Promo Sales AUR	Category Planning and Assortment Planning @ Cluster Working Plan Sales Average Unit Retail. The current planned promotional sales average unit's retail for the item.
LY Gross Profit R	Assortment Planning @ Cluster and Category Planning Last Year Gross Profit Retail. Last year's Retail Sales minus Last Year's Cost of Goods Sold.
LY Gross Profit %	Category Planning and Assortment Planning @ Cluster Last Year Gross Profit Percent. Last year's Retail Sales minus Last Year's Cost of Goods Sold divided by Last Year's Retail Sales.
WP Gross Profit R	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit Retail. Used only in IPI calculations. The current Retail Sales minus Last Year's Cost of Goods Sold.

Table 4–46   (Cont.) Set Promo Sales Targets Measures

Label	Definition
WP Gross Profit %	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit Percent. Current approved Retail Sales minus Cost of Goods Sold divided by Retail Sales.
AC LY Assort SKU Count	The total number of SKUs in the last year's assortment for the cluster.
AC LY Assort Promo SKU Count	The Number of SKUs put on promotion in the last year's assortment for the cluster.
AC LY Assort Promo SKU contrib to LY Assort SKU	The no. of SKUs put on promotion in the LY assortment relative to the total no. of SKUs in the LY assortment; expressed in percentage points.
AC WP Assort SKU Count	The total number of SKUs in the Working Plan's assortment for the cluster.
AC WP Assort Promo SKU Count	The number of SKUs put on promotion in the working plan's assortment for the cluster.
AC WP Assort Promo SKU contrib to WP Assort SKU	The no. of SKUs put on promotion in Working Plan assortment relative to the total no. of SKUs in the Working Plan assortment; expressed in percentage points.
AC CP Assort SKU Count	The total number of SKUs in the Current Plan's assortment for the cluster.
AC CP Assort Promo SKU Count	The Number of SKUs put on promotion in the current plan's assortment for the cluster.
AC CP Assort Promo SKU contrib to CP Assort SKU	The no. of SKUs put on promotion in Current Plan assortment relative to the total no. of SKUs in the Current Plan assortment; expressed in percentage points.

Set Private Label Targets View

Use this view to set the category-specific sales and profit targets for the private label.

Figure 4–57   Set Private Label Targets View

Table 4–47 lists the measures available in this view.

Table 4–47   Set Private Label Targets Measures

Label	Definition
LY Sales R	Assortment Planning @ Cluster and Category Planning Last Year Sales Retail. Last year sales revenue for the item obtained from a third party. The data is typically obtained quarterly.
LY Private Label Sales R	Category Planning and Assortment Planning @ Cluster Last Year Private Label Sales Retail. The Sales dollars for the retailer brand during the last fiscal year.
LY Private Label Sales contrib to LY Sales R	Assortment Planning @ Cluster Last Year Promo Sales contribution to Last Year Retail.
Fc Sales R	Category Planning and Assortment Planning @ Cluster Forecast Sales Retail. The sales forecast from Oracle Retail Demand Forecasting in dollars.

Table 4–47   (Cont.) Set Private Label Targets Measures

Label	Definition
WP Sales R	Assortment Planning @ Cluster and Category Planning Working Plan Sales Retail. The current planned sales revenue for the item.
WP Private Label Sales R	Category Planning and Assortment Planning @ Cluster Working Plan Private Label Sales Retail. Current approved planned sales revenue for the retailer brand.
WP Private Label Sales contrib to WP Sales R	Category Planning and Assortment Planning @ Cluster Working Plan Private Label Sales contribution to Working Plan Sales Retail.
WP Private Label Sales var to LY R	Category Planning and Assortment Planning @ Cluster Working Plan Private Label Sales variance to Last Year Retail.
LY Sales U	Assortment Planning @ Cluster and Category Planning Last Year Sales Retail. The sales units for the retailer from the same period last year obtained from a third party. The data is typically obtained quarterly.
LY Sales AUR	Assortment Planning @ Cluster Category Planning Last Year Sales Average Unit Retail. The average unit retail sales for the retailer from the same period last year obtained from a third party. The data is typically obtained quarterly.
LY Private Label Sales U	Assortment Planning @ Cluster and Category Planning Last Year Private Label Sales Units. The Sales units for the retailer brand during the last fiscal year.
Fc Sales U	Category Planning Forecast Sales Units. The sales unit forecast from Oracle Retail Demand Forecasting.
Fc Sales AUR	Category Planning and Assortment Planning @ Cluster Forecast Sales Average Units Retail. The Sales average units retail forecast from Oracle Retail Demand Forecasting.
WP Sales U	Assortment Planning @ Cluster and Category Planning Working Plan Sales Units. The current planned sales units for the item.
LY Private Label Sales AUR	Category Planning and Assortment Planning @ Cluster ast Year Private Label Sales Average Unit Retail. The average unit retail sales for the retailer brand from the same period last year; obtained from a third party. The data is typically obtained quarterly.
WP Sales AUR	Category Planning and Assortment Planning @ Cluster Working Plan Sales Average Unit Retail. The current planned sales average unit's retail for the item.
WP Private Label Sales U	Category Planning and Assortment Planning @ Cluster Working Plan Private Label Sales Units. Current approved planned sales units for the retailer brand.
WP Private Label Sales AUR	Category Planning Working Plan Private Label Sales Retail. The current planned retailer brand sales average unit's retail for the item.
LY Gross Profit R	Assortment Planning @ Cluster and Category Planning Last Year Gross Profit Retail. Last year's Retail Sales minus Last Year's Cost of Goods Sold.
LY Gross Profit %	Category Planning and Assortment Planning @ Cluster Last Year Gross Profit Percent. Last year's Retail Sales minus Last Year's Cost of Goods Sold divided by Last Year's Retail Sales.
WP Gross Profit R	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit Retail. Used only in IPI calculations. The current Retail Sales minus Last Year's Cost of Goods Sold.

Table 4–47   (Cont.) Set Private Label Targets Measures

Label	Definition
WP Gross Profit %	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit Percent. Current approved Retail Sales minus Cost of Goods Sold divided by Retail Sales.
LY Private Label Gross Profit R	Category Planning and Assortment Planning @ Cluster Last Year Private Label Gross Profit Retail. Last year's Retail Sales minus Last Year's Cost of Goods Sold for the retailer brand.
LY Private Label Gross Profit %	Category Planning and Assortment Planning @ Cluster Last Year Private Label Gross Profit Percent. Last year's Retail Sales minus respective (or planned) Cost of Goods Sold divided by Planned Retail Sales for the retailer brand.
WP Gross Profit R	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit Retail. Used only in IPI calculations. The current Retail Sales minus Last Year's Cost of Goods Sold.
LY Private Label Gross Profit contrib to LY Gross Profit R	Category Planning Last Year Private Label Gross Profit contribution to Last Year Gross Profit Retail.
Wp Gross Profit %	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit Percent. Current approved Retail Sales minus Cost of Goods Sold divided by Retail Sales.
WP Private Label Gross Profit R	Category Planning and Assortment Planning @ Cluster Working Plan Private Label Gross Profit Retail.
WP Private Label Gross Profit %	Category Planning and Assortment Planning @ Cluster Working Plan Private Label Gross Profit Percent.
WP Private Label Gross Profit contrib to WP Gross Profit R	Category Planning Working Plan Private Label Gross Profit contribution to Working Plan Gross Profit Retail.
WP Private Label Gross Profit var to LY R	Category Planning Working Plan Private Label Gross Profit variance to Last Year Retail.
AC LY Assort SKU Count	The total number of SKUs in the Current Plan's assortment for the cluster.
AC LY Assort Private Label SKU Count	The number of private label SKUs in the last year's assortment for the cluster.
AC LY Assort Private Label SKU contrib to LY Assort SKU	The no. of private label SKUs in the LY assortment relative to the total no. of SKUs in the LY assortment; expressed in percentage points.
AC WP Assort SKU Count	The total number of SKUs in the Working Plan's assortment for the cluster.
AC WP Assort Private Label SKU Count	The Number of private label SKUs in the working plan's assortment for the cluster.
AC WP Assort Private Label SKU contrib to WP Assort SKU	The no. of private label SKUs in the Working Plan assortment relative to the total no. of SKUs in the Working Plan assortment; expressed in percentage points.
AC CP Assort SKU Count	The total number of SKUs in the Current Plan's assortment for the cluster.
AC CP Assort Private Label SKU Count	The number of private label SKUs in the current plan's assortment for the cluster.
AC CP Assort Private Label SKU contrib to CP Assort SKU	The no. of private label SKUs in the Current Plan assortment relative to the total no. of SKUs in the Current Plan assortment; expressed in percentage points.

Set Inventory Targets Tab

This tab has one view.

Set Inventory Targets View

Use this view to set the scorecard targets for inventory.

Figure 4–58   Set Inventory Targets View

Table 4–48 lists the measures available in this view.

Table 4–48   Set Inventory Targets Measures

Label	Definition
LY Avg Inv R	Category Planning and Assortment Planning @ Cluster Last Year Average Inventory Retail.
WP Avg Inv R	Category Planning and Assortment Planning @ Cluster Working Plan Average Inventory Retail.
OP Avg Inv R	Assortment Planning @ Cluster and Category Planning Original Plan Average Inventory Retail.
LY Turn	Category Planning and Assortment Planning @ Cluster Last Year Turn Retail Ratio.
WP Turn	Assortment Planning @ Cluster and Category Planning Working Plan Turn Retail Ratio. The current planned number of times a retailer expects to sell out of its complete inventory in a given period of time.
OP Turn	The Pre-Season approved number of times a retailer expects to sell out of its complete inventory in a given period of time.

Approve Assortment Strategies, Tactics, and Scorecard View

Use this view to approve the assortment. Approval is the trigger that makes category roles, strategies, and tactics available to downstream solutions (for example, Assortment Planning). The Working Plan is transferred into the Current Plan, which is transferred to Assortment Planning. The plan is time-stamped and includes user information.

To approve the strategies, tactics, and scorecard, check the box next to the desired category. Enter approval comments, if desired. Click the Approve custom menu to approve. Commit the workbook changes.

Approve Assortment Strategies, Tactics, and Scorecard View

This step contains the Approve custom menu.

This view exists at the following level:

- Sub-Category (a level in the Product dimension)

- Trading Area (a level in the Location dimension)

Figure 4–59   Approve Assortment Strategies, Tactics, and Scorecard View
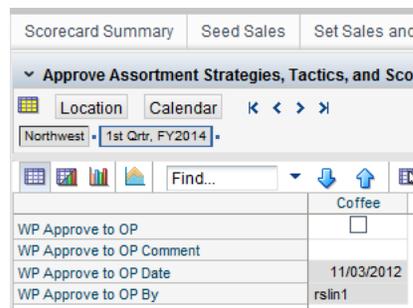
Table 4–49 lists the measures available in this view.

Table 4–49   Approve Assortment Strategies, Tactics, and Scorecard Measures

Label	Definition
WP Approve to OP	Category Planning Working Plan Approve to Original Plan Boolean. Boolean mask measure to control what is approved and not approved as the Original Plan.
WP Approve to OP Comment	Category Planning Working Plan Approve to Original Plan Comments. The comments made by the approver at the time of approving a specific plan (or an assortment) for the approval seeker to take a note of while executing the plan or working on other plans.
WP Approve OP Date	Category Planning Working Plan Approve to Original Plan Date. The date on which a specific plan or an assortment is approved.
WP Approve to OP By	Category Planning Working Plan Approve to Original Plan User. The Approver's ID or identification details. Typically, in a retail context it will be an ID of a category manager.

Next Steps

After completing category planning, continue to the Assortment Planning Analysis Task.

5

Assortment Planning Analysis Task

This task enables a retailer to analyze their current assortment and past assortment (last year, last plan) from a performance perspective, consumer segment perspective, market perspective.

Consumer insights are core to this task utilizing external market and consumer data. This task also includes visibility to the retailer's category versus competitors versus the market place as a whole. (Examples of external market data providers include Nielsen, Symphony IRI, Axciom, and FICO.)

The task assists users in analyzing their current assortments, determining the appropriate market coverage, rationalizing (validation of necessary add, drop, and keep) the assortment, and quantifying the assortment decision.

The task utilizes Assortment Clusters (or Clusters) received from ORASE (Oracle Retail Advanced Science Engine) to ensure assortments are tailored to specific markets and primary consumer segments. Stores are pre-clustered or grouped into Assortment Clusters in Oracle Retail Modeling Engine (ORME) module of ORASE, based on various parameters like Consumer Segment Profiles, Store Attributes, Performance Attributes, Product Attributes, and so on.

This task takes advantage of a feed of category planning data to make category roles, strategies, tactics, and financial objectives visible to ensure the assortment aligns back to the overall category-level objectives.

This task has the following steps:

- Performance Analysis Step
- Market Analysis Step
- Consumer Analysis Step
- Review Assortment Scorecard Step

Create the Assortment Planning Analysis Workbook

To create the workbook:

1. Select the **New Workbook** icon in the Assortment Planning Analysis activity.

Figure 5–1   Assortment Planning Analysis Task
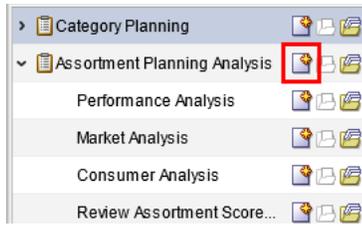
2. Select only one category and move it to the Selected Items box. Click **Next**.

Figure 5–2   Workbook Wizard Select Category Page
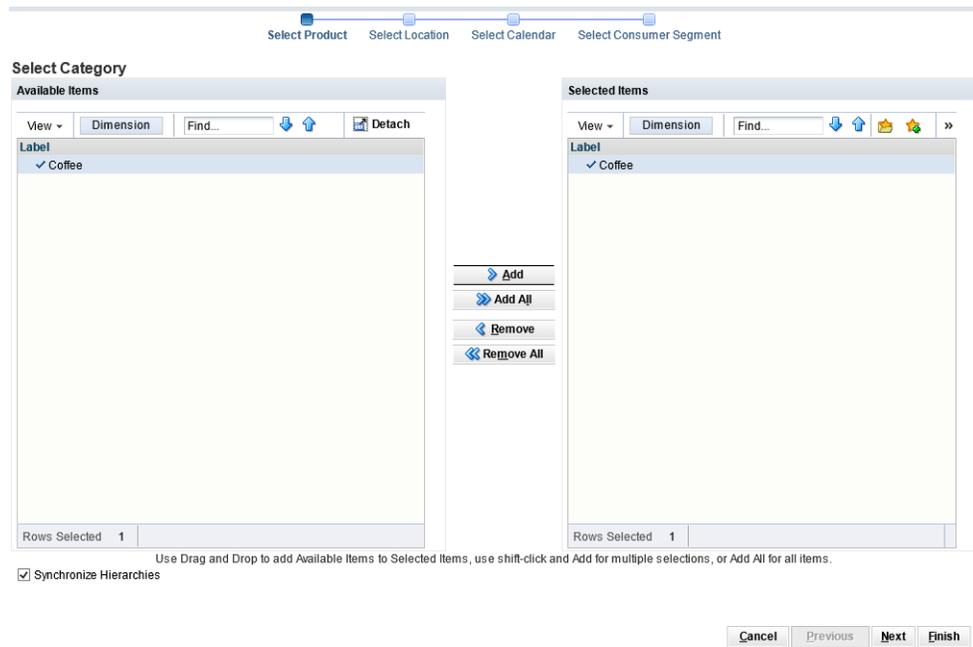
3. Select the trading areas and move them to the Selected Items box. Click **Next**.

Figure 5–3   Workbook Wizard Select Trading Area Page

4. Select the quarters and move them to the Selected Items box. Click **Next**.

Figure 5–4   Workbook Wizard Select Quarter Page
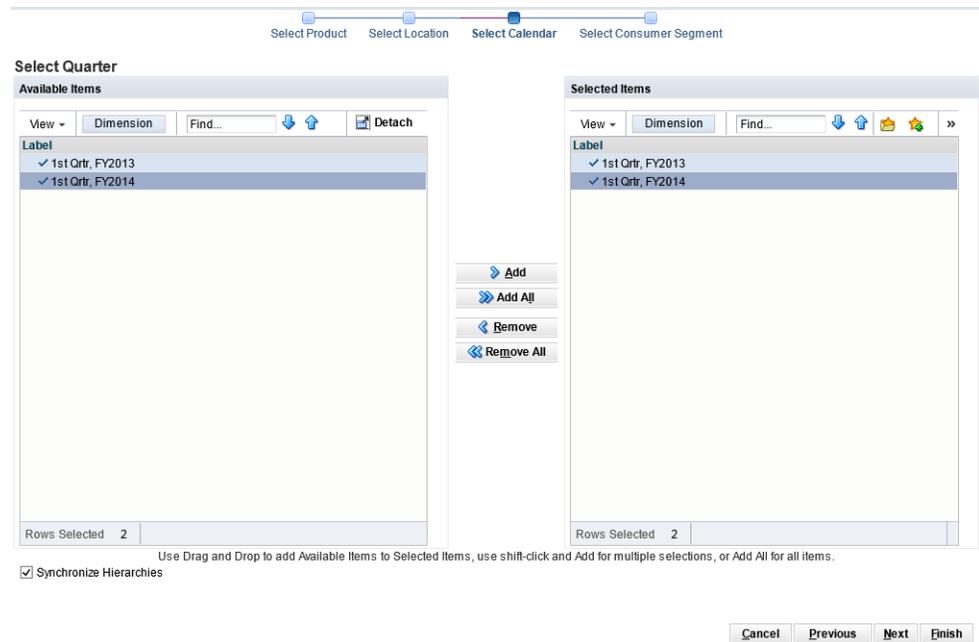
5. Select the Consumer Segments and move them to the Selected Items box. Click **Finish**.

Figure 5–5   Workbook Wizard Select Version Page
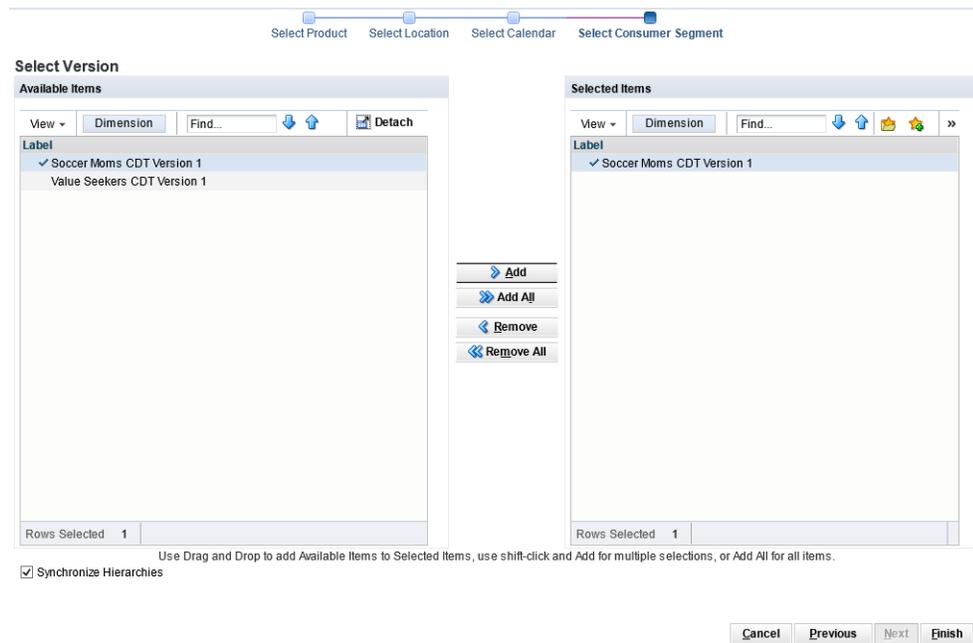
The workbook is created.

Performance Analysis Step

Use this step to analyze the performance of a category based on historical sales and forecast, if available.

This step has the following tabs and views:

- Sales and Gross Profit Analysis Tab:
    - Sales and Gross Profit Analysis View
- Performance Quadrant Analysis Tab:
    - Gross Profit and Inventory Turns View
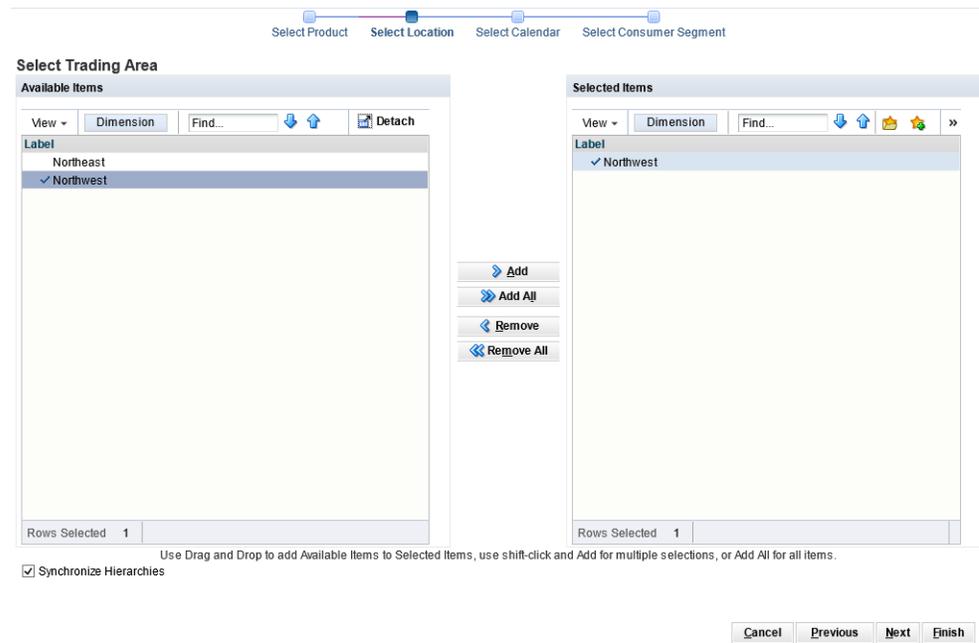   - Sales Revenue and Sales Units View
    - Sales Revenue and Gross Profit View
    - Sales and Profit per Sq Ft View

Sales and Gross Profit Analysis Tab

This tab has one view.

Sales and Gross Profit Analysis View

Use this view to analyze the contribution of sales and profits from each sub-category to the category total.

Figure 5–6   Sales and Gross Profit Analysis View

Table 5–1 lists the measures available in this view.

Table 5–1   Sales and Gross Profit Analysis Measures

Label	Definition
WP Segment % Share of Category Profit	Assortment Planning @ Cluster Working Plan Segment % Share of Category Profit Percent. The current planned fraction of category level profit that can be attributed to this segment.
WP Avg. Profit per Item R	Assortment Planning @ Cluster Working Plan Avg. Profit per Item Retail. The current planned average profit per SKU in this segment.
WP Avg. Sales per Item R	Assortment Planning @ Cluster Working Plan Avg Sales per Item Retail. The current planned average sales (in dollars) per SKU in this segment.
WP Avg. Sales per Item U	Assortment Planning @ Cluster Working Plan Avg Sales per Item Units. The current planned average sales (in units) per SKU in this segment.
WP Profit Productivity Index	Assortment Planning @ Cluster Working Plan Profit Productivity Index. Profit dollars per SKU of the segment divided by profit dollars per SKU of the category.
WP Sales Productivity Index	Assortment Planning @ Cluster Working Plan Sales Productivity Index. Sales dollars per SKU of the segment divided by Sales dollars per SKU of the category.
WP Sales contrib to Total Category R	Assortment Planning @ Cluster and Category Planning Working Plan Sales contribution to Total Category Retail. The contribution to sales value/revenue by an item (or a product dimension) to the overall sales value/revenue.
WP Sales contrib to Total Category U	Category Planning and Assortment Planning @ Cluster Working Plan Sales contribution to Total Category Unit. The contribution to sales units by an item (or a product dimension) to the overall sales value/revenue.

Performance Quadrant Analysis Tab

This tab has four views.

Gross Profit and Inventory Turns View

Use this view to analyze gross profit and inventory turns. This information is best displayed as a bubble chart.

Figure 5–7   Gross Profit and Inventory Turns View

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

Table 5–2   Gross Profit and Inventory Turns Measures

Label	Definition
WP Turn	Assortment Planning @ Cluster and Category Planning Working Plan Turn Retail Ratio. The current planned number of times a retailer expects to sell out of its complete inventory in a given period of time.
WP Gross Profit %	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit Percent. Current approved Retail Sales minus Cost of Goods Sold divided by Retail Sales.
Target Turn	The desired number of times a retailer expects to sell out of its complete inventory in a given period of time.
Target Gross Profit %	The Approved Plan Retail Sales minus respective (or approved plan) Cost of Goods Sold divided by Approved Plan Retail Sales.

Sales Revenue and Sales Units View

Use this view to analyze sales dollars and units. This information is best displayed as a bubble chart.
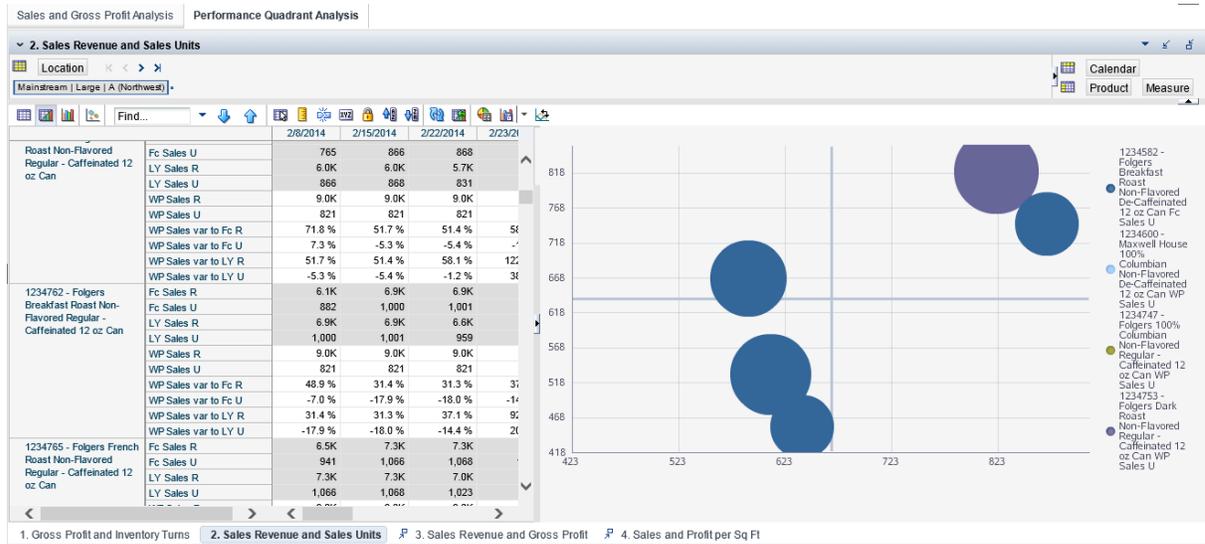
Figure 5–8   Sales Revenue and Sales Units View

Table 5–3 lists the measures available in this view.

Table 5–3   Sales Revenue and Sales Units Measures

Label	Definition
Fc Sales R	Category Planning and Assortment Planning @ Cluster Forecast Sales Retail. The sales forecast from Oracle Retail Demand Forecasting in dollars.
Fc Sales U	Category Planning Forecast Sales Units. The sales unit forecast from Oracle Retail Demand Forecasting.
LY Sales R	Assortment Planning @ Cluster and Category Planning Last Year Sales Retail. Last year sales revenue for the item obtained from a third party. The data is typically obtained quarterly.
LY Sales U	Assortment Planning @ Cluster and Category Planning Last Year Sales Retail. The sales units for the retailer from the same period last year obtained from a third party. The data is typically obtained quarterly.
WP Sales R	Assortment Planning @ Cluster and Category Planning Working Plan Sales Retail. The current planned sales revenue for the item.
WP Sales U	Assortment Planning @ Cluster and Category Planning Working Plan Sales Units. The current planned sales units for the item.
WP Sales var to Fc R	Category Planning Working and Assortment Planning @ Cluster Plan Sales variance to Forecast Retail.
WP Sales var to Fc U	Category Planning and Assortment Planning @ Cluster Working Plan Sales variance to Forecast Units
WP Sales var to LY R	Assortment Planning @ Cluster and Category Planning Working Plan Sales variance to Last Year Retail.
WP Sales var to LY U	Assortment Planning @ Cluster and Category Planning Working Plan Sales variance to Last Year Units.

Sales Revenue and Gross Profit View

Use this view to analyze gross profit and sales. This information is best displayed as a bubble chart.
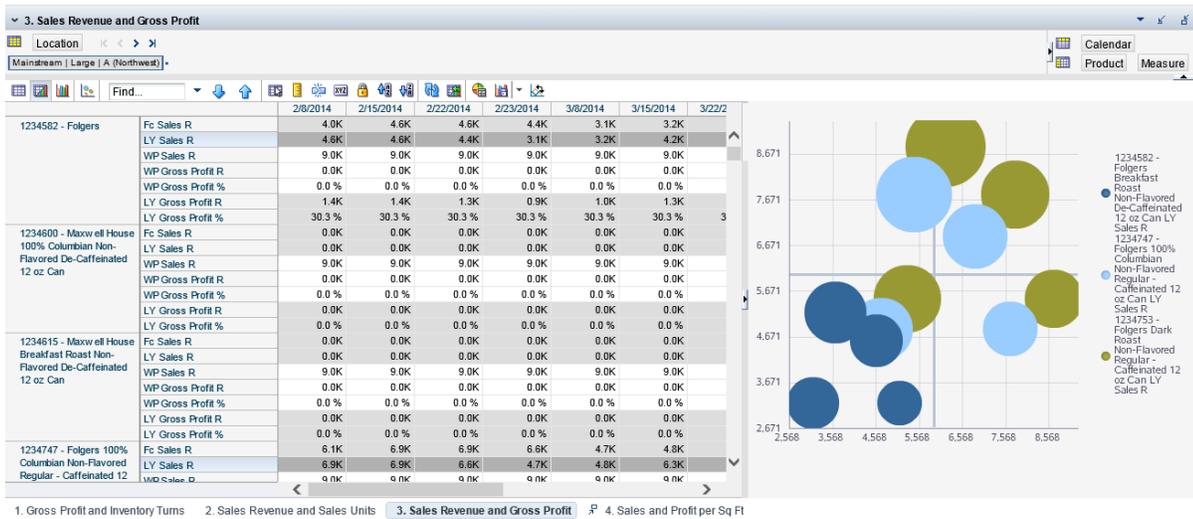
Figure 5–9   Sales Revenue and Gross Profit View

Table 5–4 lists the measures available in this view.

Table 5–4   Sales Revenue and Gross Profit Measures

Label	Definition
Fc Sales R	Category Planning and Assortment Planning @ Cluster Forecast Sales Retail. The sales forecast from Oracle Retail Demand Forecasting in dollars.
LY Sales R	Assortment Planning @ Cluster and Category Planning Last Year Sales Retail. Last year sales revenue for the item obtained from a third party. The data is typically obtained quarterly.
WP Sales R	Assortment Planning @ Cluster and Category Planning Working Plan Sales Retail. The current planned sales revenue for the item.
WP Gross Profit R	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit Retail. Used only in IPI calculations. The current Retail Sales minus Last Year's Cost of Goods Sold.
WP Gross Profit %	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit Percent. Current approved Retail Sales minus Cost of Goods Sold divided by Retail Sales.

Sales and Profit per Sq Ft View

Use this view to analyze profit and sales per square foot. This information is best displayed as a bubble chart.

Figure 5–10   Sales and Profit per Sq Ft View

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

Table 5–5   Sales and Profit per Square Foot Measures

Label	Definition
WP Sales R	Assortment Planning @ Cluster and Category Planning Working Plan Sales Retail. The current planned sales revenue for the item.
WP Gross Profit R	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit Retail. Used only in IPI calculations. The current Retail Sales minus Last Year's Cost of Goods Sold.
WP Gross Profit R per Sq Ft	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit per Square Foot Retail. The planned gross profit for a product dimension divided by the square feet allocated to that particular product dimension.
WP Sales R per Sq Ft	Category Planning and Assortment Planning @ Cluster Working Plan Sales per Square Foot Retail.

Market Analysis Step

Use this step to evaluate market coverage for each category by store cluster based on the standard hierarchy and/or by CDTs.

This step has the following tabs and views:

- Set Breakpoint and Performance Drivers Tab:
  - Set Breakpoints View
  - Set Performance Metric Driver View
- Performance Based Fragmentation Analysis Tab:
  - Performance Based Fragmentation Analysis - Market Data View
  - Performance Based Fragmentation Analysis - Retail Data View
- Item Contribution Analysis Tab:
  - Item Contribution Analysis (Market) View
  - Item Contribution Retailer View
- Proliferation Analysis Tab:
  - Proliferation Market Analysis View
  - Proliferation Retailer Analysis View

- Accumulative Ranking Tab:
  – Accumulative Ranking Market Analysis View
  – Accumulative Ranking Retailer Analysis View
- Market Assessment Tab:
  – Market Share Assessment View
  – Market Sales Trend Analysis View
  – Market Analysis View
- Market Quadrant Analysis Tab:
  – Market Sales $/ Sales Units/ Share View
  – Market Share / Growth / Sales Units View

Set Breakpoint and Performance Drivers Tab

This tab has two views.

Set Breakpoints View

Use this view to set the category breakpoints.

Figure 5–11   Set Breakpoints View

Table 5–6 lists the measures available in this view.

Table 5–6   Set Breakpoints Measures

Label	Definition
Contribution Analysis Breakpoints %	The pre-defined (user-set) break-points for the count of items (in percentage points) for a category to see the sales variance across the complete range of SKUs in that category.
Fragmentation Analysis Breakpoints %	The pre-defined (user-set) break-points for sales dollars (in percentage points) for a category to see the sales dollars variance across the complete range of SKUs in that category.

Set Performance Metric Driver View

Use this view to set key metrics for retailer and market data analysis. Selections made here are used in fragmentation analysis as the basis of its calculation. Once this selection has been completed, the user needs to run the Fragmentation Analysis custom menu to populate fragmentation analysis based worksheets.
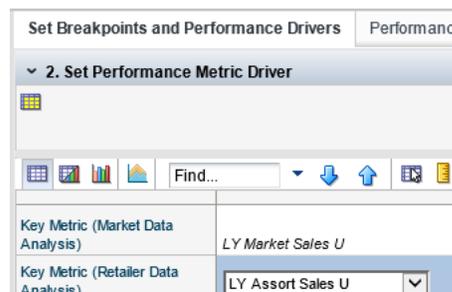
Figure 5–12   Set Performance Metric Driver View

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

Table 5–7   Select Performance Metric Driver Measures

Label	Definition
Key Metric (Market Data Analysis)	The retailer data measure used to do fragmentation and contribution analysis.
Key Metric (Retailer Data Analysis)	The market data measure used to do fragmentation and contribution analysis.

Performance Based Fragmentation Analysis Tab

Fragmentation Analysis provides a facility to divide the sales and corresponding SKU/Item count to pre-set levels or ranges, so that both these parameters/measures can be looked at side-by-side. The idea is to look at market coverage (or sales) achieved by given number of SKUs/Items. This analysis can be performed in retailer's business and overall market's (for example a trading area) business context.

Custom Menu

At any point after the information in these first three views are set, you can perform fragmentation analysis. This is done by using the Fragmentation Analysis custom menu.

The results of the fragmentation analysis populate the measures available in the following tabs:

- Performance Based Fragmentation Analysis tab
- Item Contribution Analysis tab
- Proliferation Analysis tab
- Accumulative Ranking tab

The following figure shows the views for this tab.

Figure 5–13   Performance Based Fragmentation Analysis Tab

Performance Based Fragmentation Analysis - Market Data View

Use this view to analyze the percentage of the SKUs that represent certain pre-defined breakpoints of sales dollars of the market sales data.

Figure 5–14   Performance Based Fragmentation Market Data Analysis View

Table 5–8 lists the measures available in this view.

Table 5–8   Performance Based Fragmentation Analysis - Market Data Measures

Label	Definition
Market % Sales of Item Count	The contribution towards overall sales of the market (or market coverage in other words) represented in percentage figures by a set of items or a fragment of items from the overall assortment. Typically looked at the product category level. Break-points are defined for this measure to view the fragmentation analysis.
Market Item Count to Reach Breakpoint Sales	The no. of items required in the market (trading area) as a whole to reach a pre-set break-point sales level.

Performance Based Fragmentation Analysis - Retail Data View

Use this view to analyze the percentage of the SKUs that represent certain pre-defined breakpoints of sales dollars of the retailer's sales data.

Figure 5–15   Performance Based Fragmentation Retailer Data Analysis View

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

Table 5–9   Performance Based Fragmentation Analysis - Retail Data Measures

Label	Definition
Retailer % Sales of Item Count	The contribution towards overall retail sales of the retailer (or market coverage in other words) represented in percentage figures by a set of items or a fragment of items from the overall assortment. Typically looked at on the product category level. Break-points are defined for this measure to view the fragmentation analysis.
Retailer Item Count to Reach Breakpoint Sales	The number of SKUs required to reach a pre-set sales value (in terms of Sales R) level.

Item Contribution Analysis Tab

The following figure shows the views for this tab.

Figure 5–16   Item Contribution Analysis Tab Views

Item Contribution Analysis (Market) View

Use this view to analyze the ranked list of SKUs within each level of aggregation that represent breakpoints based on SKU-count instead of sales dollars (using market data).

Figure 5–17   Item Contribution Market View

Table 5–10 lists the measures available in this view.

Table 5–10   Item Contribution Market Measures

Label	Definition
Market Item Count % of Sales	The contribution towards overall sales of the market (or market coverage in other words) represented in percentage figures by a set of items or a fragment of items from the overall assortment. Typically looked at the product category level. Break-points are defined for this measure to view the fragmentation analysis.
Market % Sales to Reach Breakpoint	The percentage of market sales (trading area sales) reached to achieve the pre-set break-point sales level.

Item Contribution Retailer View

Use this view to analyze the ranked list of SKUs within each level of aggregation that represent breakpoints based on SKU-count instead of sales dollars, but using retailer data.

Figure 5–18   Item Contribution Retailer View

Table 5–11 lists the measures available in this view.

Table 5–11   Item Contribution Retailer Measures

Label	Definition
Retailer % Sales to Reach Breakpoint	The percentage of retailer's sales reached to achieve the pre-set break-point sales level.
Retailer Item Count of % Sales	The count of items being sold in the by the retailer as a whole.

Proliferation Analysis Tab

The following figure shows the views for this tab.

Figure 5–19   Proliferation Analysis Tab Views
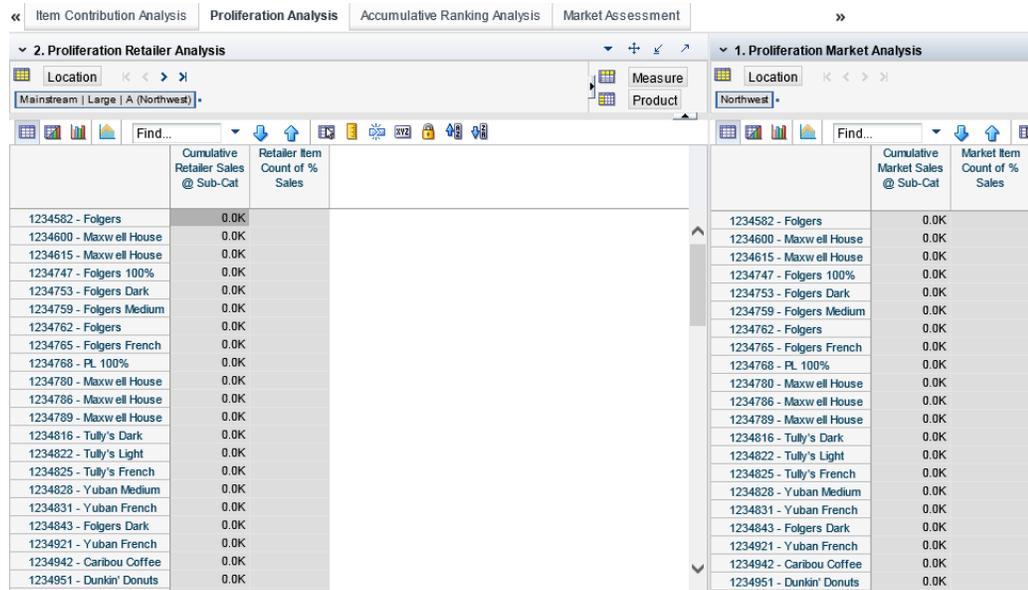
Proliferation Market Analysis View

Use this view to analyze the cumulative contribution for the retailer. A forecast is not available. This information is best displayed as a pareto chart.

Figure 5–20   Proliferation Analysis Market View

Table 5–12 lists the measures available in this view.

Table 5–12   Proliferation Market Analysis Measures

Label	Definition
Cumulative Market Sales @ Sub-Cat	Used in proliferation analysis under Market Analysis. It reflects the cumulative sales quantity of the market at the Sub-category level and is shown against the number of items to analyze the market coverage from a sales quantity perspective.
Market Item Count of % Sales	The contribution towards overall sales of the market (or market coverage in other words) represented in percentage figures by a set of items or a fragment of items from the overall assortment. Typically looked at the product category level. Break-points are defined for this measure to view the fragmentation analysis.

Proliferation Retailer Analysis View

Use this view to analyze the cumulative contribution for the retailer. This information is best displayed as a pareto chart.

Figure 5–21   Proliferation Retailer Analysis View

Table 5–13 lists the measures available in this view.

Table 5–13   Proliferation Retailer Analysis Measures

Label	Definition
Cumulative Retailer Sales @ Sub-Cat	Used in proliferation analysis under Retailer Analysis. It reflects the cumulative sales quantity of the retailer at the Sub-category level and is shown against the number of items to analyze the market coverage from a sales quantity perspective.
Retailer Item Count of % Sales	The count of items being sold in the by the retailer as a whole.

Accumulative Ranking Tab

The following figure shows the views for this tab.

Figure 5–22   Accumulative Ranking Tab Views

Accumulative Ranking Market Analysis View

Use this view to create an accumulation ranking report for the market.

Figure 5–23   Accumulative Ranking Market Analysis View

Table 5–14 lists the measures available in this view.

Table 5–14   Accumulative Market Analysis Measures

Label	Definition
Cumulative Market Sales @ Sub-Cat	Used in proliferation analysis under Market Analysis. It reflects the cumulative sales quantity of the market at the Sub-category level and is shown against the number of items to analyze the market coverage from a sales quantity perspective.
Market Rank @Sub Cat	An Index of sales for the competition in this segment compared to retailer's market share for all products in the category.

Accumulative Ranking Retailer Analysis View

Use this view to create an accumulation ranking report for the retailer.

Figure 5–24   Accumulative Ranking Retailer Analysis View
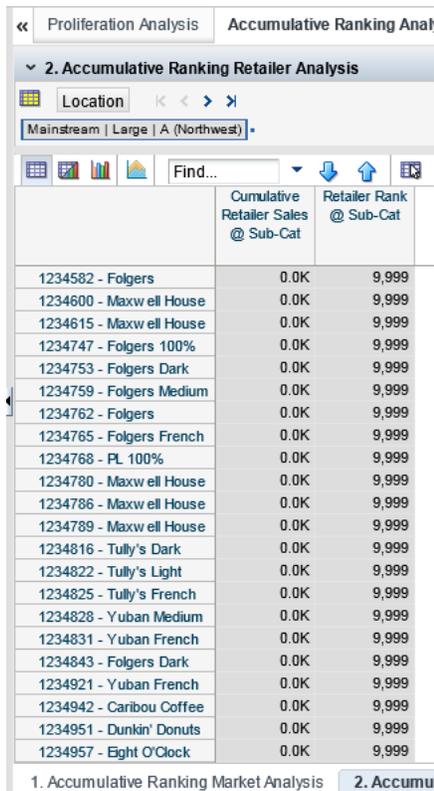
Table 5–15 lists the measures available in this view.

Table 5–15   Accumulative Ranking Retailer Analysis Measures

Label	Definition
Cumulative Retailer Sales @ Sub Cat	Used in proliferation analysis under Retailer Analysis. It reflects the cumulative sales quantity of the retailer at the Sub-category level and is shown against the number of items to analyze the market coverage from a sales quantity perspective.
Retailer Rank @ Sub Cat	An Index of the retailer's Sales in this segment compared to retailer's market share for all products in the category.

Market Assessment Tab

The following figure shows the views for this tab.

Figure 5–25   Market Assessment Tab Views
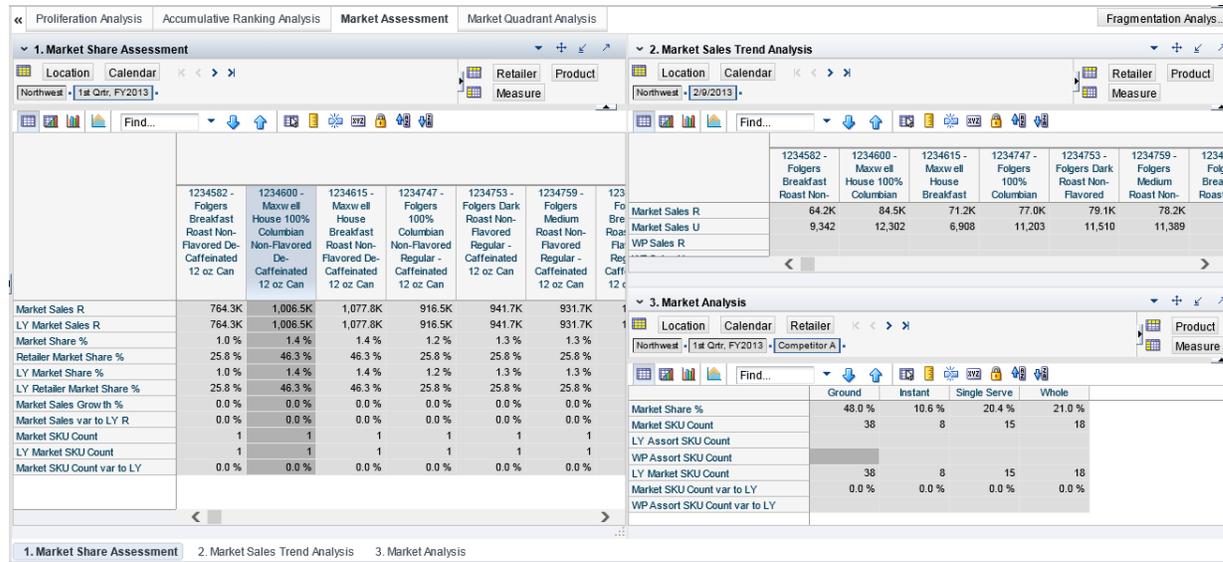
Market Share Assessment View

Use this view to analyze the Market Shares and Growth rates of the retailer among competitors at the item level compared against the rest of the market.

Figure 5–26   Market Share Assessment View
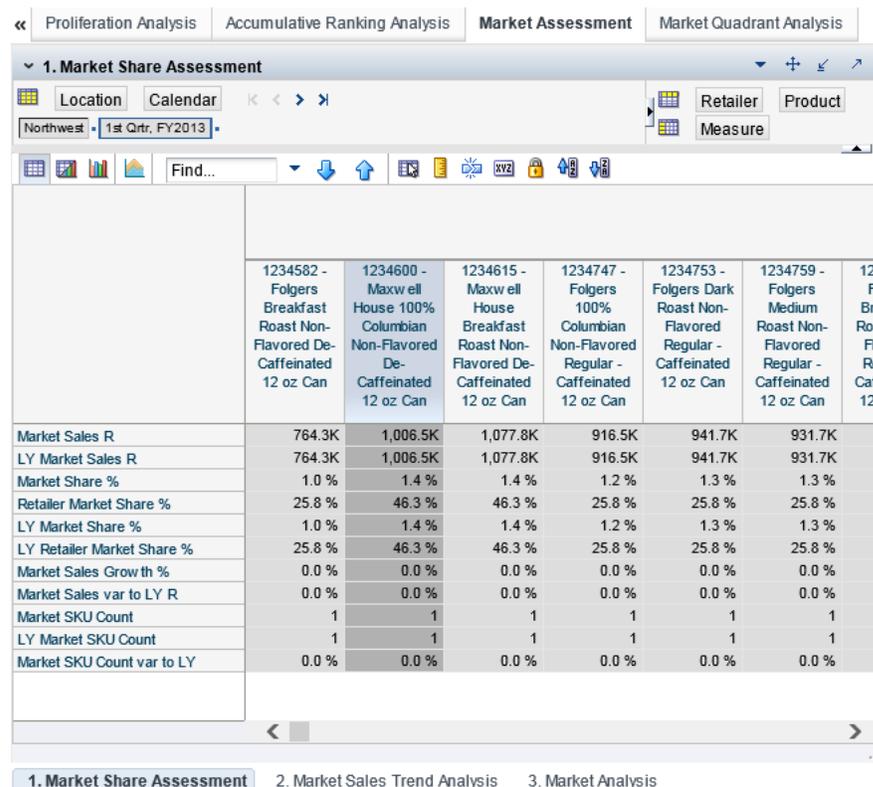
Table 5–16 lists the measures available in this view.

Table 5–16   Market Share Assessment Measures

Label	Definition
Market Sales R	Category Planning and Assortment Planning @ Cluster Default Value Market Sales Retail. The sales revenue for the item by retailer, obtained from a third party. The data is typically obtained quarterly.
LY Market Sales R	Assortment Planning @ Cluster and Category Planning Last Year Market Sales Retail. Last year's sales revenue for the item by retailer, obtained from a third party. The data is typically obtained quarterly.
Market Share %	That percent of dollar sales in a given category controlled by a distributor in a specific geography. Market share is also captured in terms of a distributor's all commodity volume (ACV) which represents the average weighted market share for all categories within the distributor's operation. The value or volume sales for one or more competitors of a retailer divided by the total universe (such as, market).
	The percent of sales volume (dollars or units) that a particular category, product segment, or item contributes to all the sales volume in the market.
Retailer Market Share %	Assortment Planning @ Cluster and Category Planning Default Value Retailer's Market Share Percent. The percent of sales revenue for the item by retailer, obtained from a third party. The data is typically obtained quarterly.
LY Market Share %	Last Year's percent of dollar sales in a given category controlled by a distributor in a specific geography. Market share is also captured in terms of a distributor's all commodity volume (ACV) which represents the average weighted market share for all categories within the distributor's operation. The value or volume sales for one or more competitors of a retailer divided by the total universe (such as, market).
	Last Year's percent of sales volume (dollars or units) that a particular category, product segment, or item contributes to all the sales volume in the market.
LY Retailer Market Share %	Assortment Planning @ Cluster and Category Planning Default Value Last Year's Retailer's Market Share Percent. Last Year's percent of sales revenue for the item by retailer, obtained from a third party. The data is typically obtained quarterly.
Market Sales Growth %	Assortment Planning @ Cluster and Category Planning Default Value Market Sales Growth Percent. The percent increase or decrease in sales volume for the entire market from the prior year.
Market Sales var to LY R	Assortment Planning @ Cluster Default Value Market Sales variance to Last Year Retail. The sales revenue for the item by retailer, obtained from a third party compared to last year.
Market SKU Count	Assortment Planning @ Cluster Default Value Market SKU Count. The Total number of SKUs carried by a competitor.
LY Market SKU Count	Assortment Planning @ Cluster Last Year Market SKU Count. The Total number of SKUs carried by a competitor last year.
Market SKU Count var to LY	Market's SKU count variance to the SKU count in Last Year's Assortment.

Market Sales Trend Analysis View

Use this view to analyze trends to see the variance between the retailer's Sales, Gross Profit, and Growth among the competition over a period of time.

Figure 5–27   Market Sales Trend Analysis View

Table 5–17 lists the measures available in this view.

Table 5–17   Market Sales Trend Analysis Measures

Label	Definition
Market Sales R	Category Planning and Assortment Planning @ Cluster Default Value Market Sales Retail. The sales revenue for the item by retailer, obtained from a third party. The data is typically obtained quarterly.
Market Sales U	Category Planning and Assortment Planning @ Cluster Default Value Market Sales Units. The Sales Units for one of more of the retailer's competitors.
WP Sales R	Assortment Planning @ Cluster and Category Planning Working Plan Sales Retail. The current planned sales revenue for the item.
WP Sales U	Assortment Planning @ Cluster and Category Planning Working Plan Sales Units. The current planned sales units for the item.
WP Sales AUR	Category Planning and Assortment Planning @ Cluster Working Plan Sales Average Unit Retail. The current planned sales average unit's retail for the item.
WP Gross Profit R	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit Retail. Used only in IPI calculations. The current Retail Sales minus Last Year's Cost of Goods Sold.
WP Gross Profit %	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit Percent. Current approved Retail Sales minus Cost of Goods Sold divided by Retail Sales.

Table 5–17 (Cont.) Market Sales Trend Analysis Measures

Label	Definition
LY Market Sales R	Assortment Planning @ Cluster and Category Planning Last Year Market Sales Retail. Last year's sales revenue for the item by retailer, obtained from a third party. The data is typically obtained quarterly.
LY Market Sales U	Assortment Planning @ Cluster and Category Planning Last Year Market Sales Units. Last year's sales units for one or more of the retailer's competitors, obtained from a third party. The data is typically obtained quarterly.
Market Sales Growth %	Assortment Planning @ Cluster and Category Planning Default Value Market Sales Growth Percent. The percent increase or decrease in sales volume for the entire market from the prior year.
LY Sales U	Assortment Planning @ Cluster and Category Planning Last Year Sales Retail. The sales units for the retailer from the same period last year obtained from a third party. The data is typically obtained quarterly.
LY Sales R	Assortment Planning @ Cluster and Category Planning Last Year Sales Retail. Last year sales revenue for the item obtained from a third party. The data is typically obtained quarterly.
LY Sales AUR	Assortment Planning @ Cluster Category Planning Last Year Sales Average Unit Retail. The average unit retail sales for the retailer from the same period last year obtained from a third party. The data is typically obtained quarterly.
WP Sales var to LY R	Assortment Planning @ Cluster and Category Planning Working Plan Sales variance to Last Year Retail.
WP Sales var to LY U	Assortment Planning @ Cluster and Category Planning Working Plan Sales variance to Last Year Units.

Market Analysis View

Use this view to understand the market coverage information in the form of SKU count to meet a specific market share level for the retailer among the competition. This view is available at the sub-category level.

Figure 5–28   Market Analysis View

Table 5–28 lists the measures available in this view.

Table 5–18   Market Analysis Measures

Label	Definition
Market Share %	That percent of dollar sales in a given category controlled by a distributor in a specific geography. Market share is also captured in terms of a distributor's all commodity volume (ACV) which represents the average weighted market share for all categories within the distributor's operation. The value or volume sales for one or more competitors of a retailer divided by the total universe (such as, market).
	The percent of sales volume (dollars or units) that a particular category, product segment, or item contributes to all the sales volume in the market.
Market SKU Count	Assortment Planning @ Cluster Default Value Market SKU Count. The Total number of SKUs carried by a competitor
LY Assort SKU Count	The Number of SKUs put on promotion in the last year's assortment for the cluster.
WP Assort SKU Count	The total number of SKUs in the Working Plan's assortment for the cluster.
LY Market SKU Count	Assortment Planning @ Cluster Last Year Market SKU Count. The Total number of SKUs carried by a competitor last year.
Market SKU Count var to LY	Market's SKU count variance to the SKU count in Last Year's Assortment
WP Assort SKU Count var to LY	Working Plan Assortment's SKU count variance to SKU count in Last Year's Assortment

Market Quadrant Analysis Tab

The following figure shows the views for this tab.

Figure 5–29   Market Quadrant Analysis Tab Views
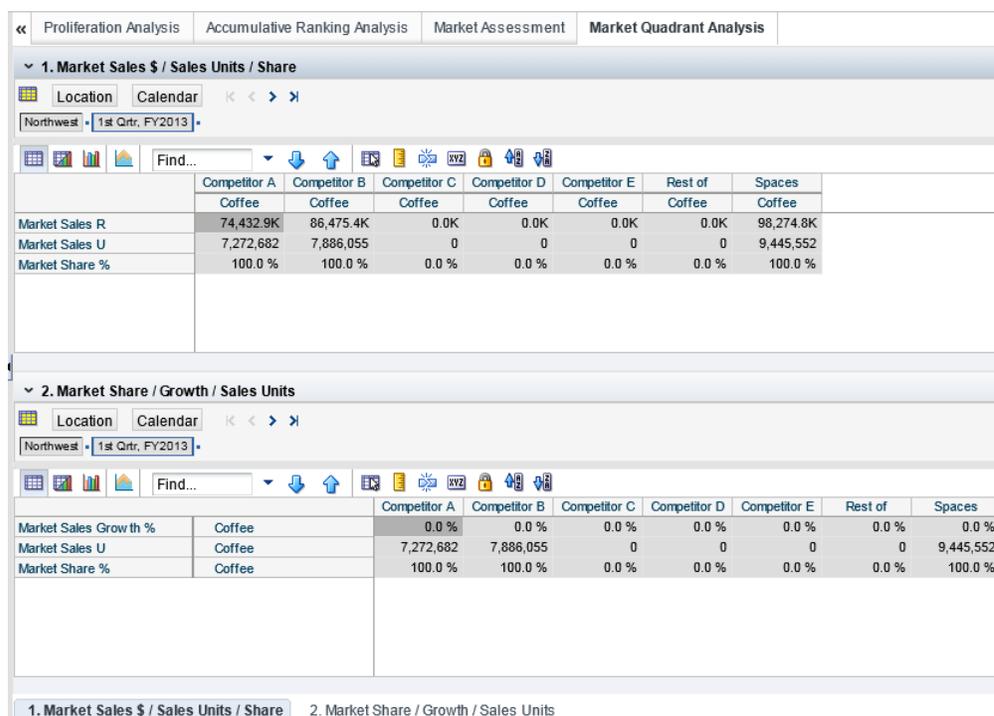
Market Sales $/ Sales Units/ Share View

Use this view to see the Market Sales R, Growth and Sales Units at the category level to gain a relative understanding from a large market perspective.

Figure 5–30   Market Sales $ / Sales Units / Share View

Table 5–19 lists the measures available in this view.

Table 5–19   Market Sales $ / Sales Units / Share Measures

Label	Definition
Market Sales R	Category Planning and Assortment Planning @ Cluster Default Value Market Sales Retail. The sales revenue for the item by retailer, obtained from a third party. The data is typically obtained quarterly.
Market Sales U	Category Planning and Assortment Planning @ Cluster Default Value Market Sales Units. The Sales Units for one of more of the retailer's competitors.
Market Share %	That percent of dollar sales in a given category controlled by a distributor in a specific geography. Market share is also captured in terms of a distributor's all commodity volume (ACV) which represents the average weighted market share for all categories within the distributor's operation. The value or volume sales for one or more competitors of a retailer divided by the total universe (such as, market).
	The percent of sales volume (dollars or units) that a particular category, product segment, or item contributes to all the sales volume in the market.

Market Share / Growth / Sales Units View

Use this view to see the Market Share, Growth and Sales Units at the category level to gain a relative understanding from a larger market perspective.

Figure 5–31   Market Share / Growth / Sales Units View

Table 5–20 lists the measures available in this view.

Table 5–20   Market Share / Growth / Sales Units Measures

Label	Definition
Market Sales Growth %	Assortment Planning @ Cluster and Category Planning Default Value Market Sales Growth Percent. The percent increase or decrease in sales volume for the entire market from the prior year.
Market Sales U	Category Planning and Assortment Planning @ Cluster Default Value Market Sales Units. The Sales Units for one of more of the retailer's competitors.
Market Share %	That percent of dollar sales in a given category controlled by a distributor in a specific geography. Market share is also captured in terms of a distributor's all commodity volume (ACV) which represents the average weighted market share for all categories within the distributor's operation. The value or volume sales for one or more competitors of a retailer divided by the total universe (such as, market).
	The percent of sales volume (dollars or units) that a particular category, product segment, or item contributes to all the sales volume in the market.

Consumer Analysis Step

This step has the following tabs and views:

- Who is the Consumer? Tab:
  - Consumer Segment Analysis View
- What is the Consumer Purchasing and How Loyal are they? Tab:
  - Purchase Behavior Analysis View
  - Consumer Loyalty Analysis View
  - Top Shopper Analysis View
- Where is the Consumer Purchasing? Tab:
  - Retail Channel Share Analysis View
  - Buyer Conversion Analysis View

Who is the Consumer? Tab

This tab has one view.

Consumer Segment Analysis View

Use this view to see the consumer segment-wise breakdown of the market where the retailer is competing. This information is available at the trading area level. This data is sourced from third party syndicated data suppliers. This provides an understanding of the composition of the market or trading area in terms of consumer segments.

Figure 5–32   Consumer Segment Analysis View

Table 5–21 lists the measures available in this view.

Table 5–21   Consumer Segment Analysis Measures

Label	Definition
Market Trading Area HH %	Category Planning and Assortment Planning @ Cluster Default Value Market Trading Area Household Percent. The Percentage of market households that belong to this profile.
Market Trading Area Spend %	Assortment Planning @ Cluster and Category Planning. Default Value Market Trading Area Spend Percent. The share of turnover that this profile gets for the market.
Retailer Trading Area HH %	Category Planning and Assortment Planning @ Cluster Default Value Retailer Trading Area Household Percent. The percentage of retailer shopper households that belong to this profile.
Retailer Trading Area Spend %	Assortment Planning @ Cluster and Category Planning Default Value Retailer Trading Area Spend Percent. The share of turnover that this profile gets for the retailer.

What is the Consumer Purchasing and How Loyal are they? Tab

This tab contains three views.

Purchase Behavior Analysis View

Use this view to analyze the contribution of sales and profits from each sub-category to the category total.

Figure 5–33   Purchase Behavior Analysis View

Table 5–22 lists the measures available in this view.

Table 5–22   Purchase Behavior Analysis Measures

Label	Definition
% Item Spend on Promo	Assortment Planning @ Cluster Default Value Item Spend on Promotion Percent. The percentage of the item's total sales that occurred due to a promotion.
Item Penetration %	Category Planning and Assortment Planning @ Cluster Default Value Item Penetration Percent. The percent of households that purchased a product group at least once within a given time frame for a specific market/region. Sometimes called consumption index.
Item Revenue per Buyer	Category Planning and Assortment Planning @ Cluster Default Value Item Revenue per Buyer Value. The amount of dollars spent by an average consumer for a specific market/region.
Item Spend per Item per Trip	Category Planning and Assortment Planning @ Cluster Default Value Item Spend per Item per Trip Value. The amount spent per buyer trip on the item.
Item Trips per Buyer	Category Planning and Assortment Planning @ Cluster Default Value Item Trips per Buyer Value. The number of times an average buyer bought this item in this sub-category.

Consumer Loyalty Analysis View

Use this view to identify the level of loyalty the consumers within the trading area have to product segments, brands, and individual SKUs.

Figure 5–34   Consumer Loyalty Analysis View

Table 5–23 lists the measures available in this view.

Table 5–23   Consumer Loyalty Analysis Measures

Label	Definition
Consumer Worth Index	Assortment Planning @ Cluster Default Value Index . The total amount of category purchases by the consumer who purchases a particular brand: size, type, flavor, and so on (consumer worth) divided by the average category spending for all brands.
Exclusivity Index	Assortment Planning @ Cluster Default Value Index. The percent of consumers purchasing a particular brand: size, type, flavor, and so on, that fulfill 100% of their category needs exclusively with that brand (exclusivity) divided by the average exclusivity for all brands in the category. As example, if 40 Households out of 100 surveyed fulfilled 100% of their annual category needs with Brand A, Brand A would have an exclusivity of 40%, (40HH/100HH = 40%). This measure enables the distributor to discriminate in favor of those items for which targeted consumers have shown an unwillingness to use other products within the category. The discontinuation of these products could result in the target consumer leaving the store. Exclusivity is converted into an index by taking the exclusivity associated with the particular brand and dividing it by the average exclusivity measure for all brands in the category. This measure can be determined at all levels of data analysis (brand, size, flavor, SKU, and so on.).

Table 5–23   (Cont.) Consumer Loyalty Analysis Measures

Label	Definition
Loyalty Index	Assortment Planning @ Cluster Default Value Loyalty Index. The share of annual category requirements that the consumer is able to satisfy with a single brand (size, type, flavor, and so on). For example, if a consumer makes 10 purchases annually in a given category, 3 of which are made of Brand A, Brand A would have a 30% loyalty, (3/10 = 30%).
	This measure enables the distributor to discriminate in favor of those items for which targeted consumers have shown a higher loyalty to purchase versus other products within the category. The discontinuation of these products could result in the target consumer leaving the store. Loyalty is converted into an index by comparing (dividing) the loyalty of Brand A by the average loyalty of all brands within the category. Loyalty and the loyalty index can be measured at all levels of data analysis (brand, size, flavor, SKU, and so on).
Switching Index	Assortment Planning @ Cluster Default Value Index. The cumulative percent of the brand's users who buy other brands (size, type, flavor, and so on) divided into the average cumulative percent of users buying other brands (size, type, flavor, and so on) in the segment. This measure enables the distributor to discriminate in favor of those items for which targeted consumers have shown an unwillingness to switch to other products within the category.
Market Basket Indec	This measure is an index measure (with an index to average calculation) indicating the ability of an SKU/Item to drive other customer purchases looked at from customer basket (market basket) perspective (micro-analysis perspective). This measure is indicative of the units in a basket and value of a basket on an average. It is generally sourced from third party syndicate data providers and derived from Household panel data or Home-scan data. It can also be derived from Retailer's Loyalty Card data. It is also used in IPI score calculations.

Top Shopper Analysis View

Use this view to compare the top shopper index of the retailer at each of the clusters.

Figure 5–35   Top Shopper Analysis View

Table 5–24 lists the measure available in this view.

Table 5–24   Top Shopper Analysis Measure

Label	Definition
Top Shopper Index	Assortment Planning @ Cluster Default Value Top Shopper Index. The total shoppers index by consumer segment.

Where is the Consumer Purchasing? Tab

This tab contains two views.

Retail Channel Share Analysis View

Use this view to see the breakdown of sales among different retail channels or formats in the market. Different retail channels or formats consist of supermarkets, drug stores, supercenters, warehouse clubs, and so on.

Figure 5–36   Retail Channel Share Analysis View

Table 5–25 lists the measures available in this view.

Table 5–25   Retail Channel Share Analysis Measures

Label	Definition
% Buyers	Assortment Planning @ Cluster and @ Store Default Value. The Percent of buyers who purchase the category in each retail segment/channel (store or cluster level).
% Dollars	Assortment Planning @ Cluster and @ Store Default The Percent of buyers' dollars that are spent in each sub-category (store level).Sometimes called consumption index.
Item Revenue per Buyer	Category Planning and Assortment Planning @ Cluster Default Value Item Revenue per Buyer Value. The amount of dollars spent by an average consumer for a specific market/region.
Item Spend per Item per Trip	Category Planning and Assortment Planning @ Cluster Default Value Item Spend per Item per Trip Value. The amount spent per buyer trip on the item.
Item Trips per Buyer	Category Planning and Assortment Planning @ Cluster Default Value Item Trips per Buyer Value. The number of times an average buyer bought this item in this sub-category.

Buyer Conversion Analysis View

Use this view to identify the level of loyalty the consumers within the trading area have to product segments, brands, and individual SKUs.

Figure 5–37   Buyer Conversion Analysis View

Table 5–26 lists the measure available in this view.

Table 5–26   Buyer Conversion Analysis Measure

Label	Definition
Buyer Conversion Rate	Category Planning and Assortment Planning @ Cluster Default Value Buyer Conversion Rate Value. Indicates the percentage of buyers who shop the sub-category as compared to all shoppers who shop the store.

Review Assortment Scorecard Step

This step has the following tabs and views:

- Category Roles, Strategies, and Tactics Tab:

  - Review Roles View

  - Review Strategies View

  - Review Tactics View

- Review Category Scorecard Tab:

  - Scorecard Summary View

- Review Consumer Segments Tab:

  - Review Consumer Segments View

Category Roles, Strategies, and Tactics Tab

This tab has three views.

Review Roles View

Use this view to review the approved roles of a category in a trading area as defined in category planning.

Figure 5–38   Review Roles View
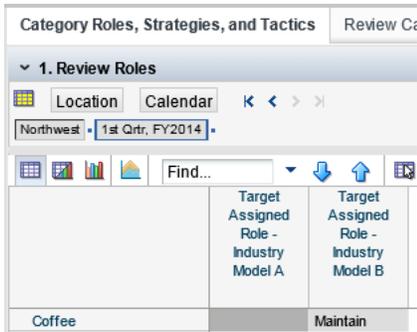
Table 5–27 lists the measures available in this view.

Table 5–27   Review Roles Measures

Label	Definition
Assigned Role - Industry Model A	The Approved Category Role (Industry Model A).
Assigned Role - Industry Model B	The Approved Category Role (Industry Model B).

Review Strategies View

Use this view to review the approved strategies of a category in a trading area as defined in category planning.

Figure 5–39   Review Strategies View

Table 5–28 lists the measure available in this view.

Table 5–28   Review Strategies Measure

Label	Definition
Target Strategy Assignment	The desired strategy being assigned to a category in the new assortment.

Review Tactics View

Use this view to review the approved tactics of a category in a trading area as defined in category planning.

Figure 5–40   Review Tactics View

Table 5–29 lists the measure available in this view.

Table 5–29   Review Tactics Measure

Label	Definition
Target Tactic Assignment	The tactic assigned to a sub-category in Category Planning. Target measures are also referred to as Original Plan measures from the approved Category Plan.

Review Category Scorecard Tab

This tab has two views.

Scorecard Summary View

Use his view to review a summary of the key measures that determine the go-forward category strategy.

Figure 5–41   Scorecard Summary View

Table 5–30 lists the measures available in this view.

Table 5–30   Scorecard Summary Measures

Label	Definition
WP Assort Sales R	Assortment Planning @ Cluster Working Plan Assortment Sales Retail. Current approved sales revenue for the assortment obtained from a third party. The data is typically obtained quarterly.
LY Assort Sales R	Assortment Planning @ Cluster Last Year Assortment Sales Retail. Last year's sales revenue for the assortment obtained from a third party. The data is typically obtained quarterly.
CP Assort Sales R	Assortment Planning @ Cluster Current Plan Assortment Sales Retail. The sales retail value of a working plan for an assortment.
Target Sales R	The desired Sales revenue for the item by retailer that the retailer wishes to obtain.
WP Assort Sales var to LY R	Assortment Planning @ Cluster Working Plan Assortment Sales variance to Last Year Retail.
WP Assort Sales var to CP R	Assortment Planning @ Cluster Working Plan Assortment Sales variance to Current Plan Retail.
WP Assort Sales var to Tgt R	Assortment Planning @ Cluster Working Plan Assortment Sales variance to Target Retail.
CP Assort Sales var to Tgt R	Assortment Planning @ Cluster Current Plan Assortment Sales variance to Target Retail.
CP Assort Sales var to LY R	Assortment Planning @ Cluster Current Plan Assortment Sales variance to Last Year Retail.
WP Assort Gross Profit R	Assortment Planning @ Cluster Working Plan Assortment Gross Profit Retail. The Retail Sales minus last year's Cost of Goods Sold.

Table 5–30   (Cont.) Scorecard Summary Measures

Label	Definition
CP Assort Gross Profit R	Assortment Planning @ Cluster Current Plan Assortment Gross Profit Retail. The current approved assortment Retail Sales minus Last Year's Cost of Goods Sold.
LY Assort Gross Profit R	Assortment Planning @ Cluster Last Year Assortment Gross Profit Retail. Last year's assortment Retail Sales minus Last Year's Cost of Goods Sold.
Target Gross Profit R	The desired Plan Retail Sales minus respective (or approved plan) Cost of Goods Sold.
WP Assort Gross Profit var to LY R	Assortment Planning @ Cluster Working Plan Assortment Gross Profit variance to Last Year Retail.
WP Assort Gross Profit var to Tgt R	Assortment Planning @ Cluster Working Plan Assortment Gross Profit variance to Target Retail.
WP Assort Gross Profit var to CP R	Assortment Planning @ Cluster Working Plan Assortment Gross Profit variance to Current Plan Retail.
CP Assort Gross Profit var to LY R	Assortment Planning @ Cluster Current Plan Assortment Gross Profit variance to Last Year Retail.
CP Assort Gross Profit var to Tgt R	Assortment Planning @ Cluster Current Plan Assortment Gross Profit variance to Target Retail.

Review Consumer Segments Tab

This tab has one view.

Review Consumer Segments View

Use this view to review the customer segments.

Figure 5–42   Review Consumer Segments View

Table 5–31 lists the measures available in this view.

Table 5–31   Review Consumer Segments Measures

Label	Definition
Consumer Seg Distribution	The percentage of consumers who belong to a given consumer segment for a given store cluster.

Table 5–31   (Cont.) Review Consumer Segments Measures

Label	Definition
Consumer Seg / Category Sales Contribution %	Assortment Planning @ Cluster Default Value Consumer Segment / Category Sales Contribution Percent. Reflects the distribution of sales across different consumer segments for a particular category.
Consumer Seg / Store Sales Contribution %	Assortment Planning @ Cluster Default Value Consumer Segment / Store Sales Contribution Percent. Reflects the distribution of sales across different consumer segments for a store, that is, which consumer segment contributes how much towards that store's overall sales value.
Sales by Consumer Seg R	Assortment Planning @ Cluster and Category Planning Default Value Sales by Consumer Segment Retail.
Sales by Consumer Seg U	Assortment Planning @ Cluster and Category Planning Default Value Sales by Consumer Segment Units.
LY Sales by Consumer Seg R	Category Planning and Assortment Planning @ Cluster Last Year Sales by Consumer Segment Retail.
LY Sales by Consumer Seg U	Category Planning and Assortment Planning @ Cluster Last Year Sales by Consumer Segment Retail.

Next Steps

After completing category planning, continue to the Assortment Planning @ Cluster Task.

6

Assortment Planning @ Cluster Task

This task enables a retailer to create assortment plans at the cluster level utilizing the IPI, Market Coverage and Incremental Curve. Demand Transference is used to fine-tune system recommended assortments based on IPI, Market Coverage and Incremental Curve. Clusters are a subset of trading areas. Prior to generating assortments, the user needs to do the required assortment setup.

This task has the following steps:

- Assortment Setup Step
- Create IPI Assortment Step
- Create Market Coverage Assessment Step
- Incremental Curve Step
- Assortment Finalization and Approval Step

Assortment Setup Step

Use this step to fulfill some of the prerequisites for an assortment plan to be created:

- A working plan for a future time period for which an assortment plan is being created. The working plan should be in alignment with the approved category plan from the Category Planning task.
- New items can be catalogs in this step using the placeholder item creation facility provided.
- New items relative to the last assortments (LY/LP/CP) being brought into the assortment can be mapped to similar items existing in the old assortments. This is done using the Like Item Mapping feature to populate sales of new items in the assortment. New items can be mapped to both the market and retailer's items sales. There is a provision to vary the mapped sales using an adjustment ratio.
- Product Attribute Value mappings can be modified using the SKU Attribute Maintenance worksheet.
- Consumer Segment Distribution and contribution to sales can be reviewed here.

This step contains the following tabs and views:

- Seed and Review Plan Sales Tab:
    - Seed Sales View
    - Review and Plan Sales View
- Create Placeholder Tab:

- – Create Placeholder Items View
- ■ Like Item Mapping Tab:
  - – Use Retail Like Item View
  - – Use Market Like Item View
  - – Use Attribute Like Item View
  - – SKU Attribute Maintenance View
- ■ Assign Consumer Segment Status Tab:
  - – Review Consumer Segment Weights View
- ■ This step also includes the following custom menu options:
  - – Seed Sales
  - – Seed Like Items

Custom Menu

There is a custom menu available called Seed Sales. You select the desired data source in the Seed Source measure from a drop-down selection. The choices are No Action, Forecast, and Last Year. The appropriate values are copied into the WP Sales R and Sales Units columns.

At any point in this step, you can calculate sales. Use the Seed Sales custom menu. This populates sales, sales units, profit, and attribute information. In the case of Market Sales, the market data is copied to the retailer's sales, scaled by the adjustment ratio.

Seed and Review Plan Sales Tab

The Seed and Review Plan Sales tab provides the facility of seeding Plan Sales (Working Plan or WP) using LY (Last Year) or Forecast plans using a custom menu. The lowest level at which seeding happens for the working plan is at the sub-category level. From the sub-category level the Working Plan (WP) is spread to the SKU/Item level and other parameters like gross profit and so on are populated.

Populating the Forecast Sales and Forecast Sales Units measures is done by running the embedded forecast. For more information on this batch operation, see the *Oracle Retail Category Management Implementation Guide*.

This tab has two views:

- ■ Seed Sales View
- ■ Review and Plan Sales View

Seed Sales View

Use this view to seed sales from LY or forecast at the sub-category level.

Figure 6–1   Seed Sales View

Table 6–1 lists the measures available in this view.

Table 6–1   Seed Sales Measures

Label	Definition
Fc Sales R	Category Planning and Assortment Planning @ Cluster Forecast Sales Retail. The sales forecast from Oracle Retail Demand Forecasting in dollars.
Fc Sales U	Category Planning Forecast Sales Units. The sales unit forecast from Oracle Retail Demand Forecasting.
LY Sales R	Assortment Planning @ Cluster and Category Planning Last Year Sales Retail. Last year sales revenue for the item obtained from a third party. The data is typically obtained quarterly.
LY Sales U	Assortment Planning @ Cluster and Category Planning Last Year Sales Retail. The sales units for the retailer from the same period last year obtained from a third party. The data is typically obtained quarterly.
WP Sales R	Assortment Planning @ Cluster and Category Planning Working Plan Sales Retail. The current planned sales revenue for the item.
WP Sales U	Assortment Planning @ Cluster and Category Planning Working Plan Sales Units. The current planned sales units for the item.
WP Sales var to LY R	Assortment Planning @ Cluster and Category Planning Working Plan Sales variance to Last Year Retail.
WP Sales var to LY U	Assortment Planning @ Cluster and Category Planning Working Plan Sales variance to Last Year Units.
WP Sales var to Fc R	Category Planning Working and Assortment Planning @ Cluster Plan Sales variance to Forecast Retail.

Table 6–1   (Cont.) Seed Sales Measures

Label	Definition
WP Sales var to Fc U	Category Planning and Assortment Planning @ Cluster Working Plan Sales variance to Forecast Units.
WP Seed Sales	Category Planning and Assortment Planning @ Cluster Working Plan Seed Sales Boolean. A Boolean measure to flag a category for seeding.

Review and Plan Sales View

Use this view to review and plan sales at the SKU/Item level. This view also presents measures such as AUR, Gross Profit R, Gross Profit %, and so on.

Figure 6–2   Review and Plan Sales View

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

Table 6–2   Review and Plan Sales Measures

Label	Definition
Fc Sales R	Category Planning and Assortment Planning @ Cluster Forecast Sales Retail. The sales forecast from Oracle Retail Demand Forecasting in dollars.
Fc Sales U	Category Planning Forecast Sales Units. The sales unit forecast from Oracle Retail Demand Forecasting.
LY Salas AUR	Assortment Planning @ Cluster Category Planning Last Year Sales Average Unit Retail. The average unit retail sales for the retailer from the same period last year obtained from a third party. The data is typically obtained quarterly.

Table 6–2   (Cont.) Review and Plan Sales Measures

Label	Definition
LY Sales R	Assortment Planning @ Cluster and Category Planning Last Year Sales Retail. Last year sales revenue for the item obtained from a third party. The data is typically obtained quarterly.
LY Sales U	Assortment Planning @ Cluster and Category Planning Last Year Sales Retail. The sales units for the retailer from the same period last year obtained from a third party. The data is typically obtained quarterly.
LY Gross Profit R	Assortment Planning @ Cluster and Category Planning Last Year Gross Profit Retail. Last year's Retail Sales minus Last Year's Cost of Goods Sold.
LY Gross Profit %	Category Planning and Assortment Planning @ Cluster Last Year Gross Profit Percent. Last year's Retail Sales minus Last Year's Cost of Goods Sold divided by Last Year's Retail Sales.
WP Sales var to LY R	Assortment Planning @ Cluster and Category Planning Working Plan Sales variance to Last Year Retail.
WP Gross Profit R	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit Retail. Used only in IPI calculations. The current Retail Sales minus Last Year's Cost of Goods Sold.
WP Sales var to Fc R	Category Planning Working and Assortment Planning @ Cluster Plan Sales variance to Forecast Retail.
WP Sales var to Fc U	Category Planning and Assortment Planning @ Cluster Working Plan Sales variance to Forecast Units.

Create Placeholder Tab

Use the Create Placeholder Items worksheet to catalog a new SKU/Item using a DPM (Dynamic Product Hierarchy) position. This view is used to create an LHS (Left Hand Side) Product position and simultaneously create an RHS (Right Hand Side) Product hierarchy for Demand Transference functionality. Both LHS and RHS are available in this worksheet.

This tab has one view.

Create Placeholder Items View

Use this view catalog new SKU/Items using Dynamic Product Hierarchy (DPM) with LHS and RHS.

Figure 6–3 Create Placeholder Items View
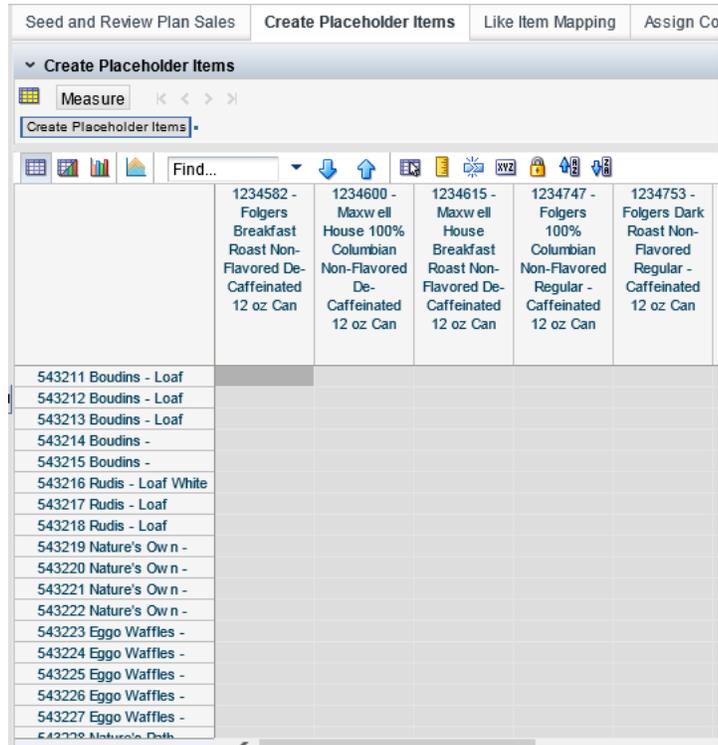
Table 6–3 lists the measure available in this view.

Table 6–3 Create Placeholder Measure

Label	Definition
Create Placeholder Items	This is a dummy measure with a base intersection of LHS SKU/RHS SKU used to order to display a worksheet with LHS Product and RHS Product hierarchies in a worksheet.

Like Item Mapping Tab

Occasionally, new items may need to be included in the planning and optimization routines. These placeholder items may be identified by using this tab. For a forecast to be generated, this tab also facilitates the mapping history from one item to another. After identified and mapped to a like item, a new item may be included in the assortment planning and optimization routines.

The category manager can define which existing items have the most similar sales characteristics.

This tab has the following views:

- Use Retail Like Item View

- Use Market Like Item View

- Use Attribute Like Item View

- SKU Attribute Maintenance View

Custom Menu

At any point in this step, you can calculate the like item effects. Use the Seed Like Items custom menu. This copies sales, sales units, profit, and attribute information from the item's "like items" to the item itself. In the case of Market Like Item, the market data is copied to the retailer's sales, scaled by the adjustment ratio.

The following figure shows the views for this step.

Figure 6–4   Like Item Mapping Step Initial Views
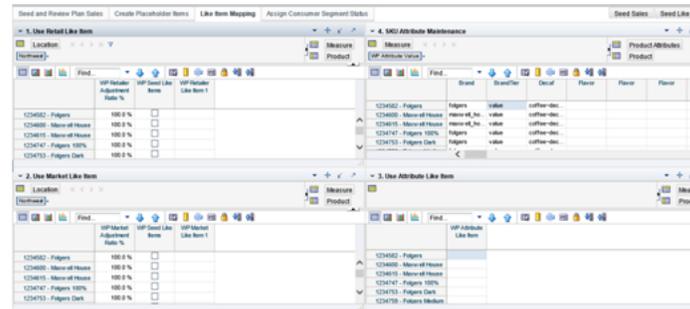
Use Retail Like Item View

Use this view to define like items for the retailer.

Figure 6–5   Use Retail Like Item View

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

Table 6–4   Use Retail Like Item Measures

Label	Definition
WP Retailer Adjustment Ratio %	Assortment Planning @ Cluster Working Plan Retailer WP Data Adjustment Ratio Percent. This provides a facility to mold or correct the sales history of Retailer History Like Item in percentage points to suit the requirement of the new item in question. The category planner may want to increase or decrease the sales history for the new item.
WP Seed Like Items	Assortment Planning @ Cluster Working Plan Seed Retailer Like Item Boolean for Market and Retail. A Boolean measure to flag a like item for seeding.
WP Retail Like Item 1 - 3	Assortment Planning @ Cluster Working Plan Seed Like Item 1 Sales using Retailer WP data Text. The items which have not been part of retailer's assortment but are required to be part of the new assortment as part of the plan, are required to have their sales history mapped to a known item's sales history. This represents the similar item from the list of other retailer items, whose sales history would most closely resemble the sales of the new item being considered to be added to the assortment.

Use Market Like Item View

Use this view to define like items for the market.

Figure 6–6   Use Market Like Item View
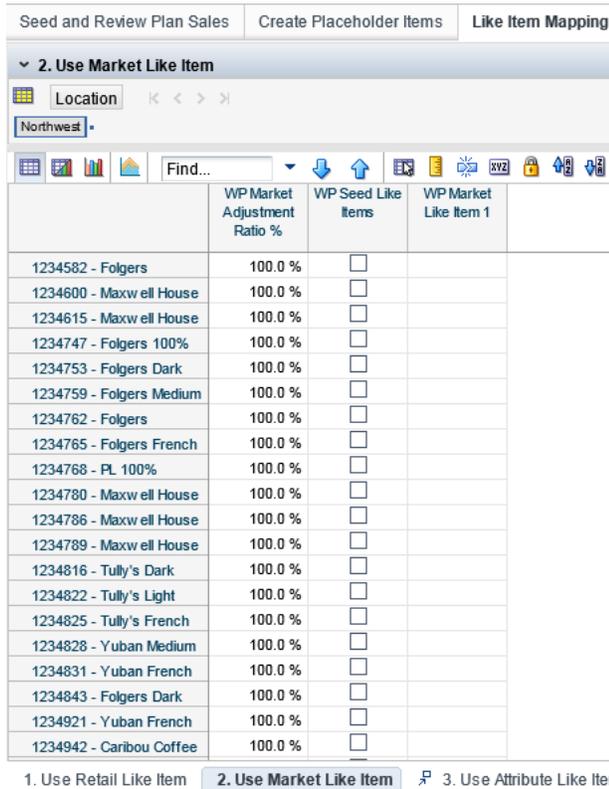
Table 6–5 lists the measures available in this view.

Table 6–5   Use Market Like Item Measures

Label	Definition
WP Market Adjustment Ratio %	Assortment Planning @ Cluster Working Plan Market WP Data Adjustment Ratio Percent. This provides a facility to mold or correct the sales history of Market History Like Item Product in percentage points to suit the requirement of the new item in question. The category planner may want to increase or decrease the sales history for the new item.
WP Seed Like Items	Assortment Planning @ Cluster Working Plan Seed Retailer Like Item Boolean for Market and Retail. A Boolean measure to flag a like item for seeding.
WP Market Like Item 1 - 3	Assortment Planning @ Cluster Working Plan Seed Like Item 1 Sales using Market WP data Text. The items which have not been part of retailer's assortment but are required to be part of the new assortment as part of the plan, require to have their sales history mapped to a known item's sales history. This represents the similar item from the list of market items, whose sales history would most closely resemble the sales of the new item being considered to be added to the assortment.

Use Attribute Like Item View

Use this view to define attributes for like items.

Figure 6–7   Use Attribute Like Item View

Table 6–6 lists the measure available in this view.

Table 6–6   Use Attribute Like Item Measure

Label	Definition
WP Attribute Like Item	Assortment Planning @ Cluster Working Plan Attribute Like Item Text. An attribute that is assigned to a product identifying it as similar to another product.

SKU Attribute Maintenance View

Use this view to modify and edit a product's attribute values mapping to SKUs/Items. The scope of maintenance includes adding new attribute values and modifying existing mappings.

Figure 6–8   SKU Attribute Maintenance View
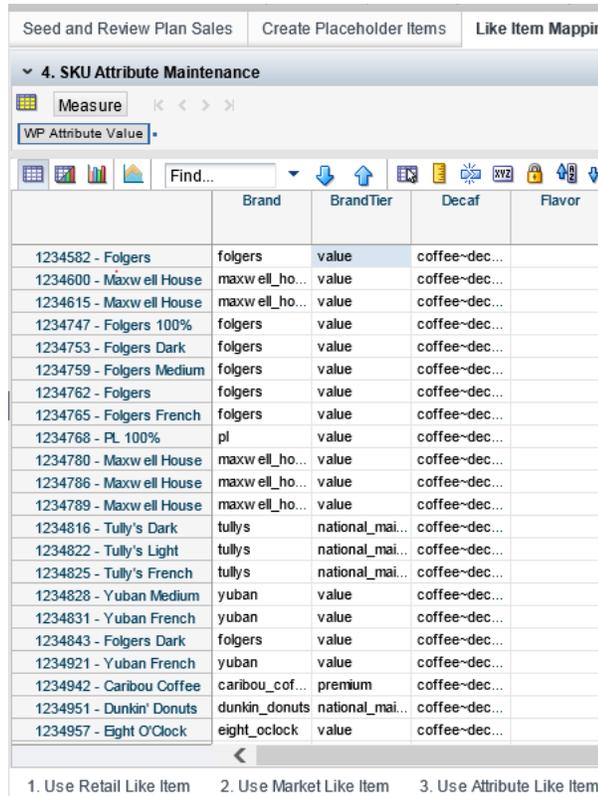
Table 6–7 lists the measure available in this view.

Table 6–7   SKU Attribute Maintenance Measure

Label	Definition
WP Attribute Value	Assortment Planning @ Cluster Working Plan Attribute Like Item Text. An attribute that is assigned to a product identifying it as similar to another product.

Assign Consumer Segment Status Tab

Use this tab to review the consumer segment distribution across different clusters and trading areas and their respective contribution to the retailer's sales at the category and store cluster level.

This tab has one view.

Review Consumer Segments View

Use this view to review consumer segments distribution across market (different trading area and clusters) and their respective contribution to a retailer sales at the category and store cluster level.

Figure 6–9   Review Consumer Segments View

Table 6–8 lists the measures available in this view.

Table 6–8   Review Consumer Segments Measures

Label	Definition
Consumer Seg Distribution	Administrator Default Value Consumer Segment Distribution Value. The percentage of consumers who belong to a given consumer segment for a given store cluster.
Consumer Seg / Category Sales Contribution %	Assortment Planning @ Cluster Default Value Consumer Segment / Category Sales Contribution Percent. Reflects the distribution of sales across different consumer segments for a particular category
Consumer Seg / Store Sales Contribution %	Assortment Planning @ Cluster Default Value Consumer Segment / Store Sales Contribution Percent. Reflects the distribution of sales across different consumer segments for a store, that is, which consumer segment contributes how much towards that store's overall sales value.
Sales by Consumer Seg R	Assortment Planning @ Cluster and Category Planning Default Value Sales by Consumer Segment Retail.
Sales by Consumer Seg U	Assortment Planning @ Cluster and Category Planning Default Value Sales by Consumer Segment Units
LY Sales by Consumer Seg R	Category Planning and Assortment Planning @ Cluster Last Year Sales by Consumer Segment Retail.
LY Sales by Consumer Seg U	Category Planning and Assortment Planning @ Cluster Last Year Sales by Consumer Segment Retail.

Create IPI Assortment Step

Use this step to compute the IPI of each SKU for each of the clusters.

This step has the following tabs and views:

- Review IPI Criteria Tab:

  - Review Focus Area Weights View

  - Review Metric Weights View

  - Review Attribute Weights View

  - Review Attribute Value Weights View

  - Review Consumer Segment Score View

- Review IPI Scores Tab:

- – Review Focus Area Score View

  – Review Consumer Segment Score View

  – Review IPI Scores View

- Set IPI Threshold Scores Tab:

  – Set IPI Assortment Threshold View

- Review IPI Assortment Recommendations Tab

  – Review IPI Assortment Recommendation View

  – Review IPI DT Details View

Custom Menu

The following custom menus are available:

- Seed IPI Weights - This custom menu is used to seed the values.

- Calc Cluster IPI Score - This custom menu is used to populate values for the views in the Review IPI Scores tab.

- Create IPI Assortment @ Cluster - This custom menu is used to create the assortment.

- Apply DT to IPI - This custom menu is used to apply the Demand Transference impact to the IPI-based system recommended assortment. This custom menu requires a reference assortment to derive Keep, Add and Drop decisions, which are used as inputs in Demand Transference calculations.

Review IPI Criteria Tab

The following figure shows the views for this tab.

Figure 6–10   Review IPI Criteria Tab Views

Review Focus Area Weights View

Use this view to review each strategy/focus area. A weight is assigned to each metric. In addition to these values being editable here, they can also be seeded with values set in IPI Setup and assignments made in Category Planning. For more information, see Chapter 4.

Figure 6–11   Review Focus Area Weights View

Table 6–9 lists the measure available in this view.

Table 6–9   Review Focus Area Weights Measure

Label	Definition
WP Focus Area Weight	Assortment Planning @ Cluster Working Plan Focus Area Weight Value. The weightage assigned to individual focus areas for a particular product category.

Review Metric Weights View

Use this view to review the metric weights and groupings.

Figure 6–12   Review Metric Weights View

Table 6–10 lists the measures available in this view.

Table 6–10   Review Metric Weights Measures

Label	Definition
WP Exclusivity Weight	Assortment Planning @ Cluster Working Plan Exclusivity Weight Value. The weightage assigned to individual focus areas keeping in mind their exclusivity.
WP Gross Profit Weight	Assortment Planning @ Cluster Working Plan Gross Profit % Weight Value. The weightage assigned to individual focus areas keeping in mind their gross profit weight.

Table 6–10   (Cont.) Review Metric Weights Measures

Label	Definition
WP Gross Profit % Weight	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit Percent. Current approved Retail Sales minus Cost of Goods Sold divided by Retail Sales.
WP Loyalty Weight	Assortment Planning @ Cluster Working Plan Loyalty Weight Value. The weightage assigned to individual focus areas based on the loyalty associated with them.
WP Sales R Weight	Assortment Planning @ Cluster Working Plan Sales R Weight Value. The percentage weightage given to 'sales retail' metric for individual focus areas in IPI calculations.
WP Sales U Weight	Assortment Planning @ Cluster Working Plan Sales U Weight Value. The percentage weightage given to 'sales unit' metric for individual focus areas in IPI calculations.
WP Switching Weight	Assortment Planning @ Cluster Working Plan Switching Weight Value.
WP Worth Weight	Assortment Planning @ Cluster Working Plan Worth Weight Value.

Review Attribute Weights View

Use this view to review the attribute weights and groupings.

Figure 6–13   Review Attribute Weights View
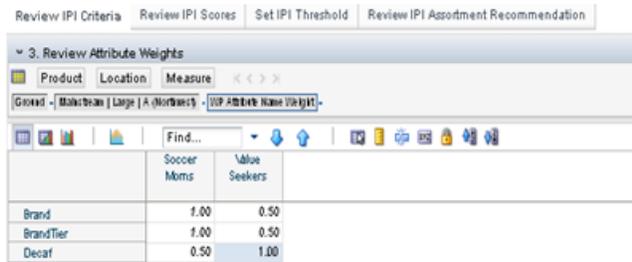
Table 6–11 lists the measure available in this view.

Table 6–11   Review Attribute Weights Measure

Label	Definition
Wp Attribute Name Weight	Assortment Planning @ Cluster Working Plan Attribute Name Weight Value.

Review Attribute Value Weights View

Use this view to review the attribute value weights and groupings.

Figure 6–14   Review Attribute Value Weights View

Table 6–12 lists the measure available in this view.

Table 6–12   Review Attribute Value Weights Measure

Label	Definition
WP Attribute Value Weight	The percentage of weightage assigned for the attribute values' IPI calculations.

Review Consumer Segment Weights View

Use this view to review consumer segment weights assigned to different consumer segments for IPI calculations. They are seeded from the Admin views.

Figure 6–15   Review Consumer Segment Weights View

Table 6–13 lists the measure available in this view.

Table 6–13   Review Consumer Segment Weights Measures

Label	Definition
WP Consumer Seg Weight	Assortment Planning @ Cluster Working Plan Consumer Segment Weight Value.

Review IPI Scores Tab

This tab has three views. Figure 6–16 shows these views.

Figure 6–16   Review IPI Scores Tab View
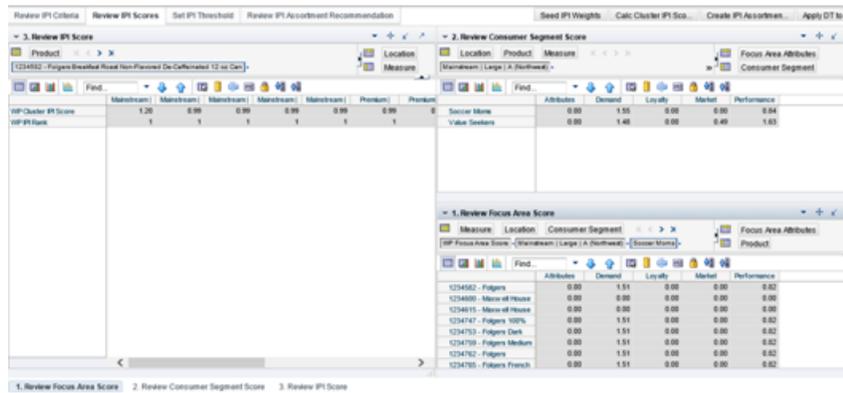
Review Focus Area Score View

Use this view to see the focus area scores:

- Within each of the focus areas, a score is computed for each assigned assortment metric. This IPI score is based on the assortment metric value as a ratio of the mean value.

- The focus area score, for each of the focus areas, is an IPI computed as a composite IPI based on the relative weight of the metrics.

At this point, you can use the custom menu Calc Cluster IPI Score to populate values in the next few views.

Figure 6–17   Review Focus Area Score View

|	Attributes	Demand	Loyalty	Market	Performance
1234582 - Folgers	0.00	1.51	0.00	0.00	0.82
1234600 - Maxwell House	0.00	0.00	0.00	0.00	0.00
1234615 - Maxwell House	0.00	0.00	0.00	0.00	0.00
1234747 - Folgers 100%	0.00	1.51	0.00	0.00	0.82
1234753 - Folgers Dark	0.00	1.51	0.00	0.00	0.82
1234759 - Folgers Medium	0.00	1.51	0.00	0.00	0.82
1234762 - Folgers	0.00	1.51	0.00	0.00	0.82
1234765 - Folgers French	0.00	1.51	0.00	0.00	0.82
1234768 - PL 100%	0.00	1.00	0.00	0.00	0.51
1234780 - Maxwell House	0.00	0.00	0.00	0.00	0.00
1234786 - Maxwell House	0.00	0.00	0.00	0.00	0.00
1234789 - Maxwell House	0.00	0.00	0.00	0.00	0.00
1234816 - Tully's Dark	0.00	1.10	0.00	0.00	0.62
1234822 - Tully's Light	0.00	1.10	0.00	0.00	0.62
1234825 - Tully's French	0.00	1.10	0.00	0.00	0.62
1234828 - Yuban Medium	0.00	0.00	0.00	0.00	0.00
1234831 - Yuban French	0.00	0.00	0.00	0.00	0.00
1234843 - Folgers Dark	0.00	1.51	0.00	0.00	0.82
1234921 - Yuban French	0.00	0.00	0.00	0.00	0.00
1234942 - Caribou Coffee	0.00	1.38	0.00	0.00	0.75
1234951 - Dunkin' Donuts	0.00	2.50	0.00	0.00	1.46
1234957 - Eight O'Clock	0.00	0.88	0.00	0.00	0.45
1235002 - PL Breakfast	0.00	1.08	0.00	0.00	0.55
1235014 - Newman's	0.00	0.88	0.00	0.00	0.47
1235098 - Caribou Coffee	0.00	0.22	0.25	0.17	0.00

Table 6–14 lists the measure available in this view.

Table 6–14   Review Focus Area Scores Measure

Label	Definition
WP Focus Area Score	Assortment Planning @ Cluster Working Plan Focus Area Score Value. IPI score for items purely based on individual focus area perspective.

Review Consumer Segment Score View

Use this view to see the consumer segment scores. Each consumer segment score is computed per the consumer segment/trading area based on the weights of the focus areas. A cluster score is then computed based on the relative weight of the consumer segments in each cluster.

Figure 6–18   Review Consumer Segment Score View

Table 6–15 lists the measure available in this view.

Table 6–15   Review Consumer Segment Score Measure

Label	Definition
WP Consumer Segment Score	Assortment Planning @ Cluster Working Plan Consumer Segment Score Value. Focus area score multiplied by the consumer segment weight.

Review IPI Scores View

Use this view to see the IPI scores. Each consumer segment score is computed per the IPI based on the weights of the focus areas. A cluster score is then computed based on the relative weight of the calculated IPI's in each cluster.

Figure 6–19   Review IPI Scores View

Table 6–16 lists the measures available in this view.

Table 6–16   Review IPI Scores Measures

Label	Definition
WP Cluster IPI Score	Assortment Planning @ Cluster Working Plan Cluster IPI Score Value.
WP IPI Rank	IPI Rank assigned to an item in based on its IPI score.

Set IPI Threshold Scores Tab

This tab has one view.

Set IPI Assortment Threshold View

Use this view to define thresholds for each sub-category and cluster. This screen is similar in function to the Set Assortment Constraints view in the Market Assessment step. Here, the thresholds are set for IPIs. These thresholds determine which items are included or excluded from the assortment calculated based on IPI scores.

> **Note:** Because a higher IPI score is better, the core threshold should be higher than the optional one. That is, core = highest scores, optional = high scores, but not quite to the core level.

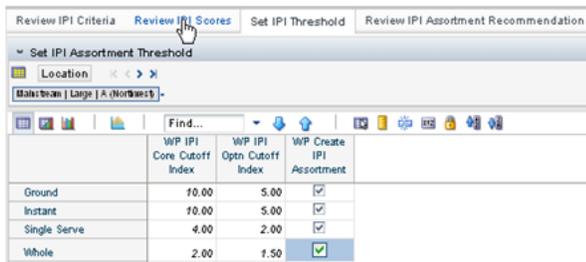*Figure 6–20   Set IPI Assortment Threshold View*

Table 6–17 lists the measures available in this view.

Table 6–17   Set IPI Assortment Threshold Measures

Label	Definition
WP IPI Core Cutoff Index	Assortment Planning @ Cluster Working Plan IPI Core Cutoff Index. The cut-off or threshold contribution for any item to be classified as a core item in the assortment.
WP IPI Optn Cutoff Index	Assortment Planning @ Cluster Working Plan IPI Optional Cutoff Index. The cut-off or threshold contribution for any item to be classified as an optional item in the assortment.
WP Create IPI Assortment	Assortment Planning @ Cluster Working Plan Create IPI Assortment Boolean. Creates an IPI assortment matching as many constraints as possible.

Review IPI Assortment Recommendations Tab

This tab has two views.

Review IPI Assortment Recommendation View

Use this view to review the system recommended IPI-based assortment. This view also contains Demand Transference parameters and provides a facility to What-If analysis by making assortment changes by marking or unmarking IPI core and IPI optional flags, thereby adding or removing SKUs/Items from the assortment. Keep, Add and Drop decisions are derived relative to a reference assortment like an LY (Last Year) assortment, CP (Current Plan) Assortment, and so on. Such a reference assortment is used as the base assortment for assortment changes in the form of Keep, Add, and Drop.

Figure 6–21   Review IPI Assortment Recommendation View 1

Table 6–18 lists the measures available in this view.

Table 6–18   Review IPI Assortment Recommendation View 1 Measures

Label	Definition
WP IPI Rank	IPI Rank assigned to an item in based on its IPI score.
WP Mandatory for Assortment	Assortment Planning @ Cluster Working Plan Mandatory for Assortment Boolean.
IPI Core Recommended	Assortment Planning @ Cluster Default Value IPI Core Boolean.
IPI Optn Recommended	Assortment Planning @ Cluster Default Value IPI Optional Boolean.
WP IPI Core	WP IPI Core Assortment @ Cluster Level. A Boolean measure used to mark the core items based on the IPI calculations in the final assortment.
WP IPI Optn	WP IPI Optn Assortment @ Cluster Level. A Boolean measure used to mark the core items based on the IPI calculations in the final assortment recommendation worksheet.
WP IPI Core Count	The number of core SKUs in the working plan assortment, which is recommended by the system based on IPI scores.
WP IPI Optn Count	The number of optional SKUs in the working plan IPI recommended assortment.
LY Assort Core	Assortment Planning @ Cluster Last Year Final Assortment Core Boolean.
LY Assort Optn	Assortment Planning @ Cluster Last Year Final Assortment Optional Boolean.
LY Assort Core Count	Assortment Planning @ Cluster Last Year Final Assortment Core Count.
LY Assort Optn Count	Assortment Planning @ Cluster Last Year Final Assortment Optional Count.

Table 6–18 (Cont.) Review IPI Assortment Recommendation View 1 Measures

Label	Definition
IPI Core Recommended Count	Assortment Planning @ Cluster Default Value IPI Core Count.
IPI Optn Recommended Count	Assortment Planning @ Cluster Default Value IPI Optional Count.
WP IPI Core Count	The number of core SKUs in the working plan assortment, which is recommended by the system based on IPI scores
WP IPI Optn Count	The number of optional SKUs in the working plan IPI recommended assortment.
CP Assort Core	Assortment Planning @ Cluster Current Plan Final Assortment Core Boolean.
CP Assort Optn	Assortment Planning @ Cluster Current Plan Final Assortment Optional Boolean.
CP Assort Core Count	Assortment Planning @ Cluster Current Plan Final Assortment Core Count.
CP Assort Optn Count	Assortment Planning @ Cluster Current Plan Final Assortment Core Count.
WP IPI Assort Compare to LY	Keep or Add or Drop decision on comparing an IPI based based assortment with an LY assortment at the cluster level.
WP IPI Assort Compare to CP	Keep or Add or Drop decision on comparing an IPI based based assortment with a Current Plan assortment at the cluster level.

Figure 6–22 Review IPI Assortment Recommendation View 2

Table 6–19 lists the measures available in this view.

Table 6–19 Review IPI Assortment Recommendation View 2 Measures

Label	Definition
IPI DT K/A/D Input	This field provides an option to the user to decide the assortment with which the comparison should be done to calculate Keep, Add or Drop actions for this assortment. This measure is specific for IPI-based assortment.
WP IPI DT Assort Sales U	Updated (or DT Affected) Demand Sales Units specifically for IC based assortment for a cluster. It is looked at vis-à-vis baseline demand sales units (IC Assort Sales U) to see the DT impact on an assortment with assortment changes.
WP IPI DT Assort Sales R	Updated (or DT Affected) Demand Sales Retail specifically for IC based assortment for a cluster. It is looked at vis-à-vis baseline demand sales retail (IC Assort Sales R) to see the DT impact on an assortment with assortment changes.

Table 6–19   (Cont.) Review IPI Assortment Recommendation View 2 Measures

Label	Definition
IPI DT No of Significant Substitute SKUs	Refers to the count of SKUs which can absorb the significant chunk of substitutable demand of an SKU in an IC based assortment.
	WP IC DT Substitutable Demand Sales R - Refers to the respective replaceable sales.
WP IPI DT Substitutable Demand Sales U	Refers to irreplaceable sales of an item, in case it is dropped from an IPI based assortment. In other words, as the name suggests, this quantum of sales is lost and does not get transferred to other SKUs in an IPI-based assortment.
WP IPI DT Substitutable Demand Sales R	Refers to the respective replaceable sales retail for the substitutable sales units for an SKU in an IPI-based assortment.
WP IPI DT Demand Transferred %	Refers to that part of demand (sales units) that has been transferred from the SKU being dropped to the substitute SKUs in IPI based assortment for a cluster. It reflects the net demand transference - distribution amongst the substitute SKUs.
WP IPI DT Lost Demand Sales U	Refers to irreplaceable sales of an item, in case it is dropped from an IC based assortment. In other words, as the name suggests, this quantum of sales is lost and does not get transferred to other SKUs in an IC-based assortment.
WP IPI DT Lost Demand Sales R	Refers to the respective irreplaceable sales retail for lost demand sales retail for an SKU in an IPI based assortment.
WP IPI Gross Profit %	Assortment Planning @ Cluster and Category Planning Working Plan IPI Gross Profit Percent. Current approved Retail Sales minus Cost of Goods Sold divided by Retail Sales for an IPI based Assortment.
WP IPI Gross Profit R	Assortment Planning @ Cluster and Category Planning Working Plan IPI Gross Profit Retail. Used only in IPI calculations. The current Retail Sales minus Last Year's Cost of Goods Sold.
WP IPI DT Gross Profit R	The updated (DT Affected) demand's Gross Profit Retail corresponding to Updated Sales Units/ Retail for an IPI based assortment. In other words it is the updated Gross Profit Retail. It is looked vis-à-vis baseline Gross Profit Retail to assess the DT impact due to assortment changes to IPI-based assortment.

Review IPI DT Details View

Use this view to review the Demand Transference distribution details of any SKU/Item in the Review IPI Assortment Recommendation view.

Figure 6–23   Review IPI DT Details View

Table 6–20 lists the measures available in this view.

Table 6–20   Review IPI DT Details Measures

Label	Definition
IPI DT Demand Sales Received %	Refers to a percentage of total sales units of an SKU, getting transferred from it and being received by its respective Substitute SKUs in an IPI based assortment. It is expressed as 'percentage of total sales of the SKUs'.
WP IPI DT Substitutable Demand Sales U	Refers to replaceable sales of an item, in case it is dropped from an IPI based assortment. In other words, as the name suggests, this quantum of sales is lost and does not get transferred to other SKUs in an IPI based assortment.
WP IPI DT Substitutable Demand Sales R	Refers to the respective replaceable sales retail for the substitutable sales units for an SKU in an IPI based assortment.
WP IPI Assort Sales R	Updated (or DT Affected) Demand Sales Retail specifically for IPI based assortment. It is looked at vis-à-vis baseline demand sales retail (WP IPI Assort Sales R) to see the DT impact on an assortment with assortment changes.
WP IPI Assort Sales U	Updated (or DT Affected) Demand Sales Units specifically for final cluster assortment. It is looked at vis-à-vis baseline demand sales units (WP IPI Assort Sales U) to see the DT impact on an assortment with assortment changes.
WP IPI DT Demand Transferred %	Refers to that part of demand (sales units) that has been transferred from the SKU being dropped to the substitute SKUs in the final assortment for a cluster. It reflects the net demand transference - distribution amongst the substitute SKUs.

Create Market Coverage Assessment Step

Use this step to derive a Market Coverage based system recommended assortment and apply Demand Transference to fine-tune the assortment.

This step has the following tabs and views:

- Set Assortment Constraints Tab:
    - Set Eligibility and Mandatory Flags View

- Set Assortment Constraint View

■ Review Market Coverage Assortment Recommendation Tab:

- Review IPI Assortment Recommendation View

- Review IPI DT Details View

Custom Menu

The following custom menus are available:

■ Create DT Assortment

■ Apply DT to Market Coverage

Set Assortment Constraints Tab

This tab has two views.

Set Eligibility and Mandatory Flags View

Use this view to set the eligibility and mandatory flags at the SKU/Item level for the Market Coverage based assortment to be derived.

Figure 6–24   Set Eligibility and Mandatory Flags View

Table 6–21 lists the measures available in this view.

Table 6–21   Set Eligibility and Mandatory Flags Measures

Label	Definition
LY Market Sales @ Cluster R	Market Sales (or Trading Area's Sales) in Last Year's Plan where the respective store cluster is mapped.
LY Market Sales Rank	Assortment Planning @ Cluster Last Year Market Sales Rank Value. An Index of the retailer's last year sales in this segment compared to retailer's market share for all products in the category.
WP Mandatory for Assortment	Assortment Planning @ Cluster Working Plan Mandatory for Assortment Boolean.
WP Assortment Eligibility	Assortment Planning @ Cluster Working Plan Assortment Eligibility Boolean. Indicates that an assortment is eligible to be sold at a location.

Set Assortment Constraint View

Use this view to set the constraints necessary to generate the assortment tactogram. It can be viewed by category, sub-category, and segment for the purpose of setting the market coverage target.

Figure 6–25   Set Assortment Constraint View
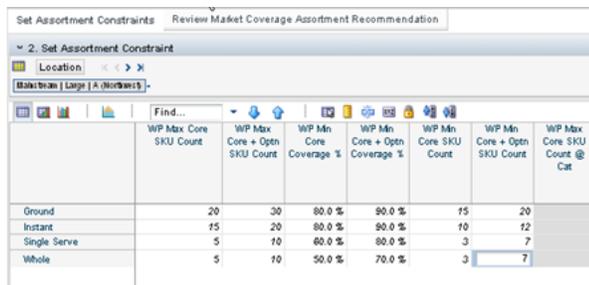
Table 6–22 lists the measures available in this view.

Table 6–22   Set Assortment Constraint Measures

Label	Definition
WP Max Core SKU Count	Assortment Planning @ Cluster Working Plan Max Core SKU Count. The Maximum number of core units targeted at a product dimension level.
WP Max Core + Optn SKU Count	Assortment Planning @ Cluster Working Plan Max Core + Optn SKU Count. The Maximum number of core plus optional units targeted at a product dimension level.
WP Min Core Coverage %	The minimum market coverage for the core items in the new assortment being planned. This can be viewed at different product dimension levels.
WP Min Core + Optn Coverage %	The minimum sales plus optional units coverage percentage targeted at a product dimension level.
WP Min Core SKU Count	The minimum number of core units targeted at a product dimension level.
WP Min Core + Optn SKU Count	The minimum number of core plus optional units targeted at a product dimension level.

Table 6–22   (Cont.) Set Assortment Constraint Measures

Label	Definition
WP Max Core SKU Count @ Cat	Assortment Planning @ Cluster Working Plan Max Core SKU Count @ Cat. The Maximum number of core units targeted at the category level.
WP Max Core + Optn SKU Count @ Cat	Assortment Planning @ Cluster Working Plan Max Core + Optn SKU Count. The Maximum number of core plus optional units targeted at the category level.
WP Min Core Coverage % @ Cat	The minimum market coverage for the core items in the new assortment being planned at the category level.
WP Min Core + Optn Coverage % @ Cat	The minimum sales plus optional units coverage percentage targeted at the category level.
WP Min Core SKU Count @ Cat	The minimum number of core units targeted at the category dimension level.
WP Min Core + Optn SKU Count @ Cat	The minimum number of core plus optional units targeted at the category dimension level.
Create Market Coverage Assortment	Creates an assortment matching as many constraints as possible.

Custom Menus This view supports two custom menus. The first, Create Assortment, creates an assortment matching as many constraints as possible. Constraints are entered on this screen in the Min Core Coverage %, Min Core + Optional Coverage %, Min Core Unit SKU Count, Min Core + Optional SKU Count, Max Core SKU Count, and Max Core + Optional SKU Count. In addition, a user can specify whether an item should be excluded from a potential assortment with the Assortment Eligibility checkbox, or if an item is required in the assortment, with the Mandatory for Assortment checkbox.

The second, Apply DT to Market Coverage applies Demand Transference impact to the system recommended Market Coverage based assortment. Once constraints are set, use the Create Assortment custom menu to attempt to satisfy as many criteria as possible while constructing an assortment. Criteria are evaluated from bottom up, meaning that the custom menu attempts to satisfy a sub-category level constraint before a category level one.

Once the algorithm has run, items selected for core and optional inclusion in the assortment are shown in the Core and Optional checkbox columns. The Success Indicator Value column contains information about whether or not the custom menu was able to satisfy a particular constraint.

Review Market Coverage Assortment Recommendation Tab

This tab contains two views.

Review Assortment Recommendation View

Use this view to review the system recommended Market Coverage based assortment. This view also contains Demand Transference parameters and provides a facility to What-If analysis by making assortment changes by marking or unmarking IPI core and IPI optional flags, thereby adding or removing SKUs/Items from the assortment. Keep, Add and Drop decisions are derived relative to a reference assortment like an LY (Last Year) assortment, CP (Current Plan) Assortment, and so on. Such a reference assortment is used as the base assortment to assortment changes in the form of Keep, Add, and Drop.

This view has four measure profiles:

- WP/CP
- WP/DT
- WP/LP
- WP/LY

Figure 6–26   Review Assortment Recommendation WP/CP Measure Profile View

Table 6–23 lists the measures available in this view.

Table 6–23   Review Assortment Recommendation WP/CP Measure Profile Measures

Label	Definition
LY Market Sales @ Cluster R	Market Sales (or Trading Area's Sales) in Last Year's Plan where the respective store cluster is mapped.
LY Market Sales Rank	Assortment Planning @ Cluster Last Year Market Sales Rank Value. An Index of the retailer's last year sales in this segment compared to retailer's market share for all products in the category.
WP Sales R	The current planned sales revenue for the item.
WP Mandatory for Assortment	Assortment Planning @ Cluster Working Plan Mandatory for Assortment Boolean.
Market Coverage Core Recommended	Assortment Planning @ Cluster Hidden Market Coverage Core Assort Recommendation Boolean.
Market Coverage Optn Recommended	Assortment Planning @ Cluster Default Value Market Coverage Optn Assort Recommendation Boolean.
WP Market Coverage Core	Assortment Planning @ Cluster Working Plan Market Coverage Core Assort Recommendation Boolean.
WP Market Coverage Optn	Assortment Planning @ Cluster Working Plan Market Coverage Optn Assort Recommendation Boolean
Market Coverage Core/Optn Error	Default Value Error measure if both Core and Optional measures are set to true for an item in a Market Coverage Assortment.
CP Assort Core	Assortment Planning @ Cluster Current Plan Final Assortment Core Boolean.
CP Assort Optn	Assortment Planning @ Cluster Current Plan Final Assortment Optional Boolean.
WP Seed Previous Assortment	Assortment Planning @ Cluster Working Plan Seed Previous Assortment Text.
Market Coverage Core Recommended Count	Assortment Planning @ Cluster Default Value Market Coverage Core Assort Recommendation Count.

Table 6–23   (Cont.) Review Assortment Recommendation WP/CP Measure Profile

Label	Definition
Market Coverage Optn Recommended Count	Assortment Planning @ Cluster Default Value Market Coverage Optn Assort Recommendation count.
WP Market Coverage Core Count	WP Market Coverage Core Assort Count.
WP Market Coverage Opt Count	WP Market Coverage Core Assort Count
CP Assort Core Count	Assortment Planning @ Cluster Current Plan Final Assortment Core Count.
CP Assort Optn Count	Assortment Planning @ Cluster Current Plan Final Assortment Core Count.
Market Core Coverage Recommended Sales R %	Market Coverage provided by core SKUs in the assortment recommended (Market Coverage Assortment).
Market Optn Coverage Recommended Sales R %	Market Coverage provided by optional SKUs in the assortment recommended (Market Coverage Assortment).
WP Market Core Coverage Sales R %	Market Coverage provided by the core SKUs in the working plan IPI-recommended assortment.
WP Market Optn Coverage Sales R %	Market Coverage provided by the optional SKUs in the working plan IPI-recommended assortment.
CP Assort Core Coverage Sales R %	Market coverage provided by core SKUs in current plan assortment.
CP Assort Optn Coverage Sales R %	Market coverage provided by optional SKUs in current plan assortment.

Figure 6–27   Review Assortment Recommendation WP/DT Measure Profile View 1

Table 6–24 lists the measures available in this view.

Table 6–24   Review Assortment Recommendation WP/DT Measure Profile View 1 Measures

Label	Definition
LY Market Sales @ Cluster R	Market Sales (or Trading Area's Sales) in Last Year's Plan where the respective store cluster is mapped.
LY Market Sales Rank	Assortment Planning @ Cluster Last Year Market Sales Rank Value. An Index of the retailer's last year sales in this segment compared to retailer's market share for all products in the category.
WP Sales R	The current planned sales revenue for the item.

Table 6–24   (Cont.) Review Assortment Recommendation WP/DT Measure Profile View 1 Measures

Label	Definition
WP Mandatory for Assortment	Assortment Planning @ Cluster Working Plan Mandatory for Assortment Boolean.
Market Coverage Core Recommended	Assortment Planning @ Cluster Hidden Market Coverage Core Assort Recommendation Boolean.
Market Coverage Optn Recommended	Assortment Planning @ Cluster Default Value Market Coverage Optn Assort Recommendation Boolean.
WP Market Coverage Core	Assortment Planning @ Cluster Working Plan Market Coverage Core Assort Recommendation Boolean.
WP Market Coverage Optn	Assortment Planning @ Cluster Working Plan Market Coverage Optn Assort Recommendation Boolean.
WP Market Coverage Core/Optn Error	Default Value Error measure if both Core and Optional measures are set to true for an item in a Market Assortment.
WP Market Coverage Core Count	WP Market Coverage Core Assort Count.
WP Market Coverage Opt Count	WP Market Coverage Core Assort Count
LY Assort Core	Assortment Planning @ Cluster Last Year Final Assortment Core Boolean.
LY Assort Optn	Assortment Planning @ Cluster Last Year Final Assortment Optional Boolean.
LY Assort Core Count	Assortment Planning @ Cluster Last Year Final Assortment Core Count.
LY Assort Optn Count	Assortment Planning @ Cluster Last Year Final Assortment Optional Count.
CP Assort Core	Assortment Planning @ Cluster Current Plan Final Assortment Core Boolean.
CP Assort Optn	Assortment Planning @ Cluster Current Plan Final Assortment Optional Boolean.
CP Assort Core Count	Assortment Planning @ Cluster Current Plan Final Assortment Core Count.
CP Assort Optn Count	Assortment Planning @ Cluster Current Plan Final Assortment Core Count.

Figure 6–28   Review Assortment Recommendation WP/DT Measure Profile View 2

Table 6–25 lists the measures available in this view.

Table 6–25 Review Assortment Recommendation WP/DT Measure Profile View 2 Measures

Label	Definition
WP Market Coverage Assort Compare to LY	Keep or Add or Drop decision on comparing a Market Coverage based assortment with an LY assortment at the cluster level.
WP Market Coverage Assort Compare to CP	Keep or Add or Drop decision on comparing a Market Coverage based assortment with a Current Plan assortment at the cluster level.
Market Coverage DT K/A/D Input	This field provides an option to the user to decide the assortment with which the comparison should be done to calculate Keep, Add or Drop actions for this assortment. This measure is specific for Market Coverage based assortment.
WP Market Coverage Assort Sales U	Sales Retail of an item present in the Market Coverage based assortment for a cluster.
WP Market Coverage Assort Sales R	Sales Units of an item present in the Market Coverage based assortment for a cluster.
WP Market Coverage DT Assort Sales U	Updated (or DT Affected) Demand Sales Units specifically for Market Coverage based assortment. It is looked at vis-à-vis baseline demand sales units (WP IPI Assort Sales U) to see the DT impact on an assortment with assortment changes.
WP Market Coverage DT Assort Sales R	Updated (or DT Affected) Demand Sales Retail specifically for Market Coverage based assortment. It is looked at vis-à-vis baseline demand sales retail (WP IPI Assort Sales R) to see the DT impact on an assortment with assortment changes.
Market Coverage DT No of Significant Substitute	Refers to the count of SKUs which can absorb the significant chunk of substitutable demand of an SKU in a Market Coverage based assortment.
WP Market Coverage DT Substitute Demand Sales U	Refers to the replaceable sales units of an SKU, in case it is dropped from a Market Coverage based assortment. In other words, substitutable demand sales units gets transferred to other SKUs in a Market Coverage based assortment.
WP Market Coverage DT Substitute Demand Sales R	Refers to the respective replaceable sales retail for substitutable sales dollars for an SKU in a Market Coverage based assortment.
WP Market Coverage DT Demand Transferred %	Refers to that part of demand (sales units) that has been transferred from the SKU being dropped to the substitute SKUs in a Market Coverage based assortment for a cluster. It reflects the net demand transference - distribution amongst the substitute SKUs.
WP Market Coverage DT Lost Demand Sales U	Refers to irreplaceable sales of an item, in case it is dropped from a Market Coverage assortment. In other words, as the name suggests, this quantum of sales is lost and does not get transferred to other SKUs in a Market Coverage assortment.
WP Market Coverage DT Lost Demand Sales R	Refers to the respective irreplaceable sales retail for lost demand sales retail for an SKU in a Market Coverage assortment. In other words, as the name suggests, this quantum of sales is lost and does not get transferred to other SKUs in a Market Coverage assortment.
WP Market Coverage Gross Profit %	Assortment Planning @ Cluster and Category Planning Working Plan Market Coverage Gross Profit Percent. Current approved Market Coverage Retail Sales minus Cost of Goods Sold divided by Market Coverage Retail Sales.

Table 6–25 (Cont.) Review Assortment Recommendation WP/DT Measure Profile View 2 Measures

Label	Definition
WP Market Coverage Gross Profit R	Assortment Planning @ Cluster and Category Planning Working Plan Market Coverage Gross Profit Retail. Used only in IPI calculations. The current Market Coverage Retail Sales minus Last Year's Cost of Goods Sold.

Figure 6–29 Review Assortment Recommendation WP/LP Measure Profile View

Table 6–26 lists the measures available in this view.

Table 6–26 Review Assortment Recommendation WP/LP Measure Profile Measures

Label	Definition
LY Market Sales @ Cluster R	Market Sales (or Trading Area's Sales) in Last Year's Plan where the respective store cluster is mapped.
LY Market Sales Rank	Assortment Planning @ Cluster Last Year Market Sales Rank Value. An Index of the retailer's last year sales in this segment compared to retailer's market share for all products in the category.
WP Sales R	The current planned sales revenue for the item.
WP Mandatory for Assortment	Assortment Planning @ Cluster Working Plan Mandatory for Assortment Boolean.
Market Coverage Core Recommended	Assortment Planning @ Cluster Hidden Market Coverage Core Assort Recommendation Boolean.
Market Coverage Optn Recommended	Assortment Planning @ Cluster Default Value Market Coverage Optn Assort Recommendation Boolean.

Table 6–26   (Cont.) Review Assortment Recommendation WP/LP Measure Profile

Label	Definition
WP Market Coverage Core	Assortment Planning @ Cluster Working Plan Market Coverage Core Assort Recommendation Boolean.
WP Market Coverage Optn	Assortment Planning @ Cluster Working Plan Market Coverage Optn Assort Recommendation Boolean.
Market Coverage Core/Optn Error	Default Value Error measure if both Core and Optional measures are set to true for an item in a Market Coverage Assortment.
LP Assort Core	Assortment Planning @ Cluster Last Plan Final Assortment Core Boolean.
LP Assort Optn	Assortment Planning @ Cluster Last Plan Final Assortment Optional Boolean.
Market Coverage Core Recommended Count	Assortment Planning @ Cluster Default Value Market Coverage Core Assort Recommendation Count.
Market Coverage Optn Recommended Count	Assortment Planning @ Cluster Default Value Market Coverage Optn Assort Recommendation count.
WP Market Coverage Core Count	WP Market Coverage Core Assort Count.
WP Market Coverage Optn Count	WP Market Coverage Core Assort Count.
LP Assort Core Count	Assortment Planning @ Cluster Last Plan Final Assortment Core Count.
LP Assort Opt Count	Assortment Planning @ Cluster Last Plan Final Assortment Optional Count.
Market Core Coverage Recommended Sales R %	Market Coverage provided by core SKUs in the assortment recommended (Market Coverage Assortment).
Market Optn Coverage Recommended Sales R %	Market Coverage provided by optional SKUs in the assortment recommended (Market Coverage Assortment).
WP Market Core Coverage Sales R %	Market Coverage provided by the core SKUs in the working plan IPI recommended assortment.
WP Market Optn Coverage Sales R %	Market Coverage provided by the optional SKUs in the working plan IPI recommended assortment.
LP Assort Core Coverage Sales R %	Market coverage provided by core SKUs in last plan's assortment.
LP Assort Optn Coverage Sales R %	Market coverage provided by optional SKUs in last plan's assortment.

Figure 6–30   Review Assortment Recommendation WP/LY Measure Profile View

Table 6–27 lists the measures available in this view.

Table 6–27   Review Assortment Recommendation WP/LY Measure Profile Measures

Label	Definition
LY Market Sales @ Cluster R	Market Sales (or Trading Area's Sales) in Last Year's Plan where the respective store cluster is mapped.
LY Market Sales Rank	Assortment Planning @ Cluster Last Year Market Sales Rank Value. An Index of the retailer's last year sales in this segment compared to retailer's market share for all products in the category.
WP Sales R	The current planned sales revenue for the item.
WP Mandatory for Assortment	Assortment Planning @ Cluster Working Plan Mandatory for Assortment Boolean.
Market Coverage Core Recommended	Assortment Planning @ Cluster Hidden Market Coverage Core Assort Recommendation Boolean.
Market Coverage Optn Recommended	Assortment Planning @ Cluster Default Value Market Coverage Optn Assort Recommendation Boolean.
WP Market Coverage Core	Assortment Planning @ Cluster Working Plan Market Coverage Core Assort Recommendation Boolean.
WP Market Coverage Optn	Assortment Planning @ Cluster Working Plan Market Coverage Optn Assort Recommendation Boolean.
Market Coverage Core/Optn Error	Default Value Error measure if both Core and Optional measures are set to true for an item in a Market Coverage Assortment.
LY Assort Core	Assortment Planning @ Cluster Last Year Final Assortment Core Boolean.
LY Assort Optn	Assortment Planning @ Cluster Last Year Final Assortment Optional Boolean.
Market Coverage Core Recommended Count	Assortment Planning @ Cluster Default Value Market Coverage Core Assort Recommendation Count.

Table 6–27   (Cont.) Review Assortment Recommendation WP/LY Measure Profile

Label	Definition
Market Coverage Optn Recommended Count	Assortment Planning @ Cluster Default Value Market Coverage Optn Assort Recommendation count.
WP Market Coverage Core Count	WP Market Coverage Core Assort Count.
WP Market Coverage Opt Count	WP Market Coverage Core Assort Count.
LY Assort Core Count	Assortment Planning @ Cluster Last Year Final Assortment Core Count.
LY Assort Optn Count	Assortment Planning @ Cluster Last Year Final Assortment Optional Count.
Market Coverage Core Recommended Sales R %	Market Coverage provided by core SKUs in the assortment recommended (Market Coverage Assortment).
Market Coverage Optn Recommended Sales R %	Market Coverage provided by core SKUs in the assortment recommended (Market Coverage Assortment).
WP Market Core Coverage Sales R %	Market Coverage provided by the core SKUs in the working plan IPI recommended assortment.
WP Market Optn Coverage Sales R %	Market Coverage provided by the optional SKUs in the working plan IPI recommended assortment.
LY Assort Core Coverage Sales R %	Market coverage provided by core SKUs in last year's assortment.
LY Assort Optn Coverage Sales R %	Market coverage provided by optional SKUs in last year's assortment.

Review Market Coverage DT Details

Use this view to review the Demand Transference distribution details of any SKU/Item in the Review (Market Coverage) Assortment Recommendation view.

Figure 6–31   Review Market Coverage DT Details View

Table 6–28 lists the measures available in this view.

Table 6–28   Review Market Coverage DT Details Measures

Label	Definition
Market Coverage DT Demand Sales Received %	Refers to a percentage of total sales units of an SKU, getting transferred from it and being received by its respective Substitute SKUs in a Market Coverage based assortment. It is expressed as 'percentage of total sales of the SKU's.

Table 6–28   (Cont.) Review Market Coverage DT Details Measures

Label	Definition
WP Market Coverage DT Substitutable Demand Sales U	Refers to the replaceable sales units of an SKU, in case it is dropped from a Market Coverage based assortment. In other words, substitutable demand sales units get transferred to other SKUs in a Market Coverage based assortment.
WP Market Coverage DT Substitutable Demand Sales R	Refers to the respective replaceable sales retail for substitutable sales dollars for an SKU in a Market Coverage based assortment
WP Market Coverage DT Demand Transferred %	Refers to that part of demand (sales units) that has been transferred from the SKU being dropped to the substitute SKUs in a Market Coverage based assortment for a cluster. It reflects the net demand transference - distribution amongst the substitute SKUs.

Incremental Curve Step

Use this step to generate an Incremental Curve and Incremental Curve based system recommended assortment.

This step has the following tabs and views:

- Review IC Assortment Curve Tab:
    - Incremental Curve Setup View
    - Review Incremental Curve View
- Review IC Assortment and DT Details Tab:
    - Review IC Assortment View
    - Review IC Assortment DT Details View

Custom Menu

The following custom menu is available:

- Calc Incremental Curve

Review IC Assortment Curve Tab

This tab has two views.

Incremental Curve Setup View

Use this view to setup the constraints or bound values (upper and lower bound values) and incremental curve admin measures required to generate an incremental curve and an incremental curve based assortment.

Figure 6–32   Incremental Curve Setup View
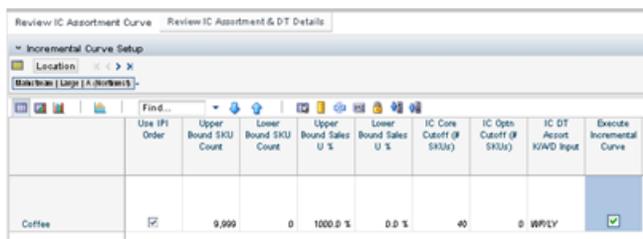
Table 6–29 lists the measures available in this view.

Table 6–29   Incremental Curve Setup Measures

Label	Definition
Use IPI Order	A flag measure (or field) to indicate the sequencing of SKUs or the order in which SKUs are used by the Java library to calculate the incremental curve.
Upper Bound SKU Count	Upper limit of the range of incremental curve to be presented is defined in the form of SKU Count from a predefined order or sequence of SKUs.
Lower Bound SKU Count	Lower limit of the range of incremental curve to be presented is defined in the form of SKU Count from a predefined order or sequence of SKUs.
Upper Bound Sales U %	Upper limit of the range of incremental curve to be presented is defined in the form of Sales Units % of the overall assortment.
Lower Bound Sales U %	Lower limit of the range of incremental curve to be presented is defined in the form of Sales Units % of the overall assortment.
IC Core Cutoff (# SKUs)	The desired numbrerof core SKUs (SKUs marked with IC core flag) in the system recommended IC based Assortment.
IC Optn Cutoff (# SKUs)	The desired number of optional SKUs (SKUs marked with IC optional flag) in the system recommended IC based Assortment.
IC DT Assort K/A/D/ Input	This field provides an option to the user to decide the assortment with which the comparison should be done to calculate Keep, Add or Drop actions for this assortment. This measure is specific for IC-based assortment.
Execute Incremental Curve	A flag measure, which requires to be ticked to generate an incremental curve.

Review Incremental Curve View

Use this view to review the Incremental Curve generated. It is used to identify the point on the chart where the cumulative incremental sales stagnate or plateau.

Figure 6–33   Review Incremental Curve View
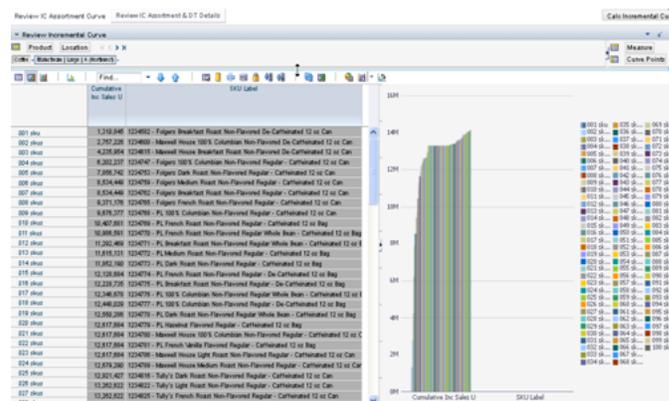
Table 6–30 lists the measures available in this view.

Table 6–30   Review Incremental Curve Measures

Label	Definition
Cumulative Inc Sales U	Successive addition of incremental sales of items in an incremental curve plot in the order in which the items are sequenced or ordered.
SKU Label	Dynamic SKU Label. The label displayed for a sku based on things like trading area, category, or consumer segment.

Review IC Assortment and DT Details Tab

This tab has two views.

Review IC Assortment View

Use this view to review the incremental curve based system recommended assortment. This view also contains Demand Transference parameters and provides a facility to What-If analysis by making assortment changes by marking or unmarking IPI core and IPI optional flags, thereby adding or removing SKUs/Items from the assortment. Keep, Add and Drop decisions are derived relative to a reference assortment like an LY (Last Year) assortment, CP (Current Plan) Assortment, and so on. Such a reference assortment is used as the base assortment to assortment changes in the form of Keep, Add and Drop.

Figure 6–34   Review IC Assortment View

Table 6–31 lists the measures available in this view.

Table 6–31   Review IC Assortment Measures

Label	Definition
IC Core	A Flag measure to indicate if an item in Incremental Curve based assortment (@ Cluster) is a core item.
IC Rank	An item's rank based on the incremental sales or incremental curve plot for a category.
IC Optn	A Flag measure to indicate if an item in Incremental Curve based assortment is a optional item.

Table 6–31   (Cont.) Review IC Assortment Measures

Label	Definition
IC Core Count	The Count of core items in an Incremental Curve based assortment for a cluster.
IC Optn Count	The Count of optional items in an Incremental Curve based assortment for a cluster.
IC Assort Sales U	The Sales Units of an item present in the Incremental Curve based assortment for a cluster.
IC Assort Sales R	The Sales retail of an item present in the Incremental Curve based assortment for a cluster.
IC Assort Compare to LY	A Keep or Add or Drop decision on comparing an Incremental Curve based assortment with an LY assortment at the cluster level.
IC Assort Compare to CP	A Keep or Add or Drop decision on comparing an Incremental Curve based assortment with a Current Plan assortment at the cluster level.
IC DT Assort Sales U	Updated (or DT Affected) Demand Sales Units specifically for IC based assortment for a cluster. It is looked at vis-à-vis baseline demand sales units (IC Assort Sales U) to see the DT impact on an assortment with assortment changes.
IC DT Assort Sales R	Updated (or DT Affected) Demand Sales Retail specifically for IC based assortment for a cluster. It is looked at vis-à-vis baseline demand sales retail (IC Assort Sales R) to see the DT impact on an assortment with assortment changes.
IC DT No of Significant Substitute SKUs	Refers to the count of SKUs which can absorb the significant chunk of substitutable demand of an SKU in an IC based assortment.
IC DT Substitutable Demand Sales U	Refers to irreplaceable sales of an item, in case it is dropped from an IC based assortment. In other words, as the name suggests, this quantum of sales is lost and does not get transferred to other SKUs in an IC based assortment.
IC DT Substitutable Demand Sales R	Refers to the respective replaceable sales retail for the substitutable sales units for an SKU in an IC based assortment.
IC DT Demand Transferred %	Refers to that part of demand (sales units) that has been transferred from the SKU being dropped to the substitute SKUs in IC based assortment for a cluster. It reflects the net demand transference - distribution amongst the substitute SKUs.
IC DT Lost Demand Sales U	The irreplaceable sales units of an item, in case it is dropped from an IC based assortment. In other words, as the name suggests, this quantum of sales is lost and does not get transferred to other SKUs in an IC based assortment.
IC DT Lost Demand Sales R	Refers to the respective irreplaceable sales retail or sales retail which is lost if this SKU if it is dropped from an IC based assortment.
IC Gross Profit %	The Gross Profit percentage of an item present in an Incremental Curve based assortment for a cluster.
IC Gross Profit R	The Gross Profit Retail of an item present in an Incremental Curve based assortment for a cluster.
IC DT Gross Profit R	The updated (DT Affected) demand's Gross Profit Retail corresponding to Updated Sales Units/ Retail for an IC based assortment. In other words it is the updated Gross Profit Retail. It is looked vis-à-vis baseline Gross Profit Retail to assess the DT impact due to assortment changes to an IC based assortment.

Review IC Assortment DT Details View

Use this view to review the Demand Transference distribution details of any SKU/Item in the Review IPI Assortment Recommendation view.

Figure 6–35   Review IC Assortment DT Details View

Table 6–32 lists the measures available in this view.

Table 6–32   Review IC Assortment Details Measures

Label	Definition
IC DT Demand Sales Received %	Refers to a percentage of total sales units of an SKU, getting transferred from it and being received by its respective Substitute SKUs in an IC-based assortment for a cluster. It is expressed as 'percentage of total sales of the SKUs.
IC DT Substitutable Demand Sales U	Refers to irreplaceable sales units of an item, in case it is dropped from an IC-based assortment. In other words, as the name suggests, this quantum of sales is lost and does not get transferred to other SKUs in an IC-based assortment.
IC DT Substitutable Demand Sales R	Refers to irreplaceable sales retail of an item, in case it is dropped from an IC-based assortment. In other words, as the name suggests, this quantum of sales is lost and does not get transferred to other SKUs in an IC-based assortment.
IC Assort Sales U	The sales units of an item present in the Incremental Curve based assortment for a cluster.
IC Assort Sales R	The sales retail of an item present in the Incremental Curve based assortment for a cluster.
IC DT Demand Transferred %	Refers to that part of demand (sales units) that has been transferred from the SKU being dropped to the substitute SKUs in IC based assortment for a cluster. It reflects the net demand transference - distribution amongst the substitute SKUs.

Assortment Finalization and Approval Step

Use this step to finalize and approve the assortment and at the cluster level.

This step has the following tabs and views:

- Review Assortment Recommendation Tab:
  - Review Assortment Recommendation View
  - Review DT Details View
- Assortment Quantification Summary Tab:
  - Assortment Quantification Summary View
- Export to SO Cluster Tab:
  - Assortment Label and Location Filtering View
  - Request Type and Role Model View
- Approve Assortment @ Cluster Tab:
  - Approve Assortment View

Review Assortment Recommendation Tab

This tab has two views and four measure profiles:

- WP/CP
- WP/DT
- WP/LP
- WP/LY

Review Assortment Recommendation View

Use this view to review the final system recommended assortment at the cluster level. This view contains the system recommendation from IPI based assortment, Market Coverage based assortment and Incremental Curve based assortment. It provides the facility to the user to look at the various recommendations and make decisions to derive a final assortment at the cluster level. The user can either use an assortment purely based IPI or Market Coverage or Incremental Curve or can go with a mix of all three types of recommendations.

Custom Menu The following custom menus are available:

- Seed Core/Optional Recommendations
- Seed Previous Assortment
- Apply DT to Final Assortment

Figure 6–36   Review Assortment Recommendation WP/CP Measure Profile View

Table 6–33 lists the measures available in this view.

Table 6–33   Review Assortment Recommendation WP/CP Measure Profile Measures

Label	Definition
WP Mandatory for Assortment	Assortment Planning @ Cluster Working Plan Mandatory for Assortment Boolean.
WP IPI Core	WP IPI Core Assortment @ Cluster Level. A Boolean measure used to mark the core items based on the IPI calculations in the final assortment.
WP IPI Optn	WP IPI Optn Assortment @ Cluster Level. A Boolean measure used to mark the core items based on the IPI calculations in the final assortment recommendation worksheet.
WP Market Coverage Core	Assortment Planning @ Cluster Working Plan Market Coverage Core Assort Recommendation Boolean.
WP Market Coverage Optn	Assortment Planning @ Cluster Working Plan Market Coverage Optn Assort Recommendation Boolean.
WP Seed Final Core/Optn	Assortment Planning @ Cluster Working Plan Seed Assortment from Pre-Rat or IPI Text.
WP Assort Core	Assortment Planning @ Cluster Working Plan Final Assortment Core Boolean.
WP Assort Optn	Assortment Planning @ Cluster Working Plan Final Assortment Optional Boolean.
Assort Core/Optn Error	The Default Value Error measure if both Core and Optional measures are set to true for an item in a Store Assortment.

Table 6–33   (Cont.) Review Assortment Recommendation WP/CP Measure Profile

Label	Definition
CP Assort Core	Assortment Planning @ Cluster Current Plan Final Assortment Core Boolean.
CP Assort Optn	Assortment Planning @ Cluster Current Plan Final Assortment Optional Boolean.
WP Final Assortment Compare to CP	Assortment Planning @ Cluster Working Plan Final Assortment Compare to CP Text.
WP Assort Core Count	Assortment Planning @ Cluster Working Plan Final Assortment Core Count.
WP Assort Optn Count	Assortment Planning @ Cluster Working Plan Final Assortment Optional Count.
WP % Contribution of Category Items	Assortment Planning @ Cluster Working Plan % Contribution of Category Items Percent. The contribution of an item or a set of items under a category towards the whole category.
CP Assort Core Count	Assortment Planning @ Cluster Current Plan Final Assortment Core Count.
CP Assort Optn Count	Assortment Planning @ Cluster Current Plan Final Assortment Core Count.
WP Assort Core Coverage Sales R %	Market Coverage provided by the core SKUs in the working plan's assortment.
WP Assort Optn Coverage Sales R %	Market Coverage provided by the core SKUs in the working plan's assortment.
CP Assort Core Coverage Sales R %	Market coverage provided by core SKUs in current plan assortment.
CP Assort Optn Coverage Sales R %	Market coverage provided by optional SKUs in current plan assortment.

Figure 6–37   Review Assortment Recommendation WP/DT Measure Profile View 1 Measures

Table 6–34 lists the measures available in this view.

Table 6–34   Review Assortment Recommendation WP/DT Measure Profile View 1 Measures

Label	Definition
WP Mandatory for Assortment	Assortment Planning @ Cluster Working Plan Mandatory for Assortment Boolean.
WP IPI Core	WP IPI Core Assortment @ Cluster Level. A Boolean measure used to mark the core items based on the IPI calculations in the final assortment.
WP IPI Optn	WP IPI Optn Assortment @ Cluster Level. A Boolean measure used to mark the core items based on the IPI calculations in the final assortment recommendation worksheet.
WP Market Coverage Core	Assortment Planning @ Cluster Working Plan Market Coverage Core Assort Recommendation Boolean.
WP Market Coverage Optn	Assortment Planning @ Cluster Working Plan Market Coverage Optn Assort Recommendation Boolean.
IC Core	A Flag measure to indicate if an item in Incremental Curve based assortment (@Cluster) is a core item.
IC Optn	A Flag measure to indicate if an item in Incremental Curve based assortment is a optional item.
WP Seed Final Core/Optn	Assortment Planning @ Cluster Working Plan Seed Assortment from Pre-Rat or IPI Text.
WP Seed Previous Assortment	Assortment Planning @ Cluster Working Plan Seed Previous Assortment Text.
WP Assort Core	Assortment Planning @ Cluster Working Plan Final Assortment Core Boolean.

Table 6–34   (Cont.) Review Assortment Recommendation WP/DT Measure Profile View 1 Measures

Label	Definition
WP Assort Optn	Assortment Planning @ Cluster Working Plan Final Assortment Optional Boolean.
Assort Core/Optn Error	Default Value Error measure if both Core and Optional measures are set to true for an item in a Store Assortment.
WP Assort Core Count	Assortment Planning @ Cluster Working Plan Final Assortment Core Count.
WP Assort Optn Count	Assortment Planning @ Cluster Working Plan Final Assortment Optional Count.
WP % Contribution of Category Items	Assortment Planning @ Cluster Working Plan % Contribution of Category Items Percent. The contribution of an item or a set of items under a category towards the whole category.
WP Final Assort Compare to LY	Assortment Planning @ Cluster Working Plan Final Assortment Compare to LY Text.
WP Final Assort Compare to CP	Assortment Planning @ Cluster Working Plan Final Assortment Compare to CP Text.
DT Assort K/A/D Input	This field provides an option to the user to decide the assortment with which the comparison should be done to calculate Keep, Add or Drop actions for this assortment. This measure is specific for Final Cluster assortment.
WP Use DT Sales	Flag measure to indicate if WP Assort Sales in the final assortment should be populated by updated demand (DT Affected Sales). If it is ticked then it will populate the WP Assort Sales with DT Sales else WP Assort Sales will be populated by WP Sales.

Figure 6–38   Review Assortment Recommendation WP/DT Measure Profile View 2

Table 6–35 lists the measures available in this view.

Table 6–35   Review Assortment Recommendation WP/DT Measure Profile View 2 Measures

Label	Definition
WP Assort Sales U	Assortment Planning @ Cluster Working Plan Assortment Sales Units. Current approved sales units for the assortment obtained from a third party. The data is typically obtained quarterly.
WP Assort Sales R	Assortment Planning @ Cluster Working Plan Assortment Sales Retail. Current approved sales revenue for the assortment obtained from a third party. The data is typically obtained quarterly.
WP DT Assort Sales U	Updated (or DT Affected) Demand Sales Units specifically for final cluster assortment. It is looked at vis-à-vis baseline demand sales units (WP IPI Assort Sales U) to see the DT impact on an assortment with assortment changes.
WP DT Assort Sales R	Updated (or DT Affected) Demand Sales Retail specifically for final cluster assortment. It is looked at vis-à-vis baseline demand sales retail (WP IPI Assort Sales R) to see the DT impact on an assortment with assortment changes.
DT No of Significant SKUs	Refers to the count of SKUs which can absorb the significant chunk of substitutable demand of an SKU in a Final Cluster assortment.
WP DT Substitutable Demand Sales U	Refers to the replaceable sales units of an SKU, in case it is dropped from a Final Cluster assortment. In other words, substitutable demand sales units gets transferred to other SKUs in a Final Cluster assortment.

Table 6–35   (Cont.) Review Assortment Recommendation WP/DT Measure Profile View 2 Measures

Label	Definition
WP DT Substitutable Demand Sales R	Refers to the respective replaceable sales retail for the substitutable sales units for an SKU in a Final Cluster assortment
WP DT Demand Transferred %	Refers to that part of demand (sales units) that has been transferred from the SKU being dropped to the substitute SKUs in a store assortment for a cluster. It reflects the net demand transference - distribution amongst the substitute SKUs.
WP DT Lost Demand Sales U	Refers to irreplaceable sales of an item, in case it is dropped from a Final Cluster assortment. In other words, as the name suggests, this quantum of sales is lost and does not get transferred to other SKUs in a Final Cluster assortment.
WP DT Lost Demand Sales R	Refers to the respective irreplaceable sales retail for lost demand sales retail for an SKU in a Final Cluster assortment.
WP Assort Gross Profit %	Assortment Planning @ Cluster Working Plan Assortment Gross Profit Percent. The Retail Sales divided by last year's Cost of Goods Sold.
WP Assort Gross Profit R	Assortment Planning @ Cluster Working Plan Assortment Gross Profit Retail. The Retail Sales minus last year's Cost of Goods Sold.
WP DT Assort Gross Profit R	The updated (DT Affected) demand's Gross Profit Retail corresponding to Updated Sales Units/ Retail for a Store assortment. In other words it is the updated Gross Profit Retail. It is looked vis-à-vis baseline Gross Profit Retail to assess the DT impact due to assortment changes to a Store assortment.

Figure 6–39   Review Assortment Recommendation WP/LP Measure Profile View

Table 6–36 lists the measures available in this view.

Table 6–36   Review Assortment Recommendation WP/LP Measure Profile Measures

Label	Definition
WP Mandatory for Assortment	Assortment Planning @ Cluster Working Plan Mandatory for Assortment Boolean.
WP IPI Core	WP IPI Core Assortment @ Cluster Level. A Boolean measure used to mark the core items based on the IPI calculations in the final assortment.
WP IPI Optn	WP IPI Optn Assortment @ Cluster Level. A Boolean measure used to mark the core items based on the IPI calculations in the final assortment recommendation worksheet.
WP Market Coverage Core	Assortment Planning @ Cluster Working Plan Market Coverage Core Assort Recommendation Boolean.
WP Market Coverage Optn	Assortment Planning @ Cluster Working Plan Market Coverage Optn Assort Recommendation Boolean
WP Seed Final Core/Optn	Assortment Planning @ Cluster Working Plan Seed Assortment from Pre-Rat or IPI Text.
WP Assort Core	Assortment Planning @ Cluster Working Plan Final Assortment Core Boolean.
WP Assort Optn	Assortment Planning @ Cluster Working Plan Final Assortment Optional Boolean.
Assort Core/Optn Error	Default Value Error measure if both Core and Optional measures are set to true for an item in a Store Assortment.
LP Assort Core	Assortment Planning @ Cluster Last Plan Final Assortment Core Boolean.
LP Assort Optn	Assortment Planning @ Cluster Last Plan Final Assortment Optional Boolean.
WP Final Assortment Compare to CP	Assortment Planning @ Cluster Working Plan Final Assortment Compare to CP Text.
WP Assort Core Count	Assortment Planning @ Cluster Working Plan Final Assortment Core Count.
WP Assort Optn Count	Assortment Planning @ Cluster Working Plan Final Assortment Optional Count.
WP % Contribution of Category Items	Assortment Planning @ Cluster Working Plan % Contribution of Category Items Percent. The contribution of an item or a set of items under a category towards the whole category.
LP Assort Core Count	Assortment Planning @ Cluster Last Plan Final Assortment Core Count.
LP Assort Optn Count	Assortment Planning @ Cluster Last Plan Final Assortment Optional Count.
WP Assort Core Coverage Sales R %	Market Coverage provided by the core SKUs in the working plan's assortment.
WP Assort Optn Coverage Sales R %	Market Coverage provided by the core SKUs in the working plan's assortment.
LP Assort Core Coverage Sales R %	Market coverage provided by core SKUs in last plan's assortment.
LP Assort Optn Coverage Sales R %	Market coverage provided by optional SKUs in last plan's assortment.

Figure 6–40   Review Assortment Recommendation WP/LY Measure Profile View

Table 6–37 lists the measures available in this view.

Table 6–37   Review Assortment Recommendation WP/LY Measure Profile Measures

Label	Definition
WP Mandatory for Assortment	Assortment Planning @ Cluster Working Plan Mandatory for Assortment Boolean.
WP IPI Core	WP IPI Core Assortment @ Cluster Level. A Boolean measure used to mark the core items based on the IPI calculations in the final assortment.
WP IPI Optn	WP IPI Optn Assortment @ Cluster Level. A Boolean measure used to mark the core items based on the IPI calculations in the final assortment recommendation worksheet.
WP Market Coverage Core	Assortment Planning @ Cluster Working Plan Market Coverage Core Assort Recommendation Boolean.
WP Market Coverage Optn	Assortment Planning @ Cluster Working Plan Market Coverage Optn Assort Recommendation Boolean.
WP Seed Final Core/Optn	Assortment Planning @ Cluster Working Plan Seed Assortment from Pre-Rat or IPI Text.
WP Assort Core	Assortment Planning @ Cluster Working Plan Final Assortment Core Boolean.
WP Assort Optn	Assortment Planning @ Cluster Working Plan Final Assortment Optional Boolean.
Assort Core/Optn Error	Default Value Error measure if both Core and Optional measures are set to true for an item in a Store Assortment.

Table 6–37   (Cont.) Review Assortment Recommendation WP/LY Measure Profile

Label	Definition
LY Assort Core	Assortment Planning @ Cluster Last Year Final Assortment Core Boolean.
LY Assort Optn	Assortment Planning @ Cluster Last Year Final Assortment Optional Boolean.
WP Final Assortment Compare to LY	Assortment Planning @ Cluster Working Plan Final Assortment Compare to LY Text.
WP Assort Core Count	Assortment Planning @ Cluster Working Plan Final Assortment Core Count.
WP Assort Optn Count	Assortment Planning @ Cluster Working Plan Final Assortment Optional Count.
WP % Contribution of Category Items	Assortment Planning @ Cluster Working Plan % Contribution of Category Items Percent. The contribution of an item or a set of items under a category towards the whole category.
LY Assort Core Count	Assortment Planning @ Cluster Last Year Final Assortment Core Count.
LY Assort Optn Count	Assortment Planning @ Cluster Last Year Final Assortment Core Count.
WP Assort Core Coverage Sales R %	Market Coverage provided by the core SKUs in the working plan's assortment.
WP Assort Optn Coverage Sales R %	Market Coverage provided by the core SKUs in the working plan's assortment.
LY Assort Core Coverage Sales R %	Market coverage provided by core SKUs in last year's assortment.
LY Assort Optn Coverage Sales R %	Market coverage provided by optional SKUs in last year's assortment.

Review DT Details View

Use this view to review the Demand Transference distribution details of any SKU/Item in the final assortment for the cluster in the Review Assortment Recommendation view.

Figure 6–41   Review DT Details View

Table 6–38 lists the measures available in this view.

Table 6–38   Review DT Details Measures

Label	Definition
DT Demand Sales Received %	Refers to a percentage of total sales units of an SKU, getting transferred from it and being received by its respective Substitute SKUs in an IC based assortment. It is expressed as 'percentage of total sales of the SKUs'.
WP DT Substitutable Demand Sales U	Refers to the replaceable sales units of an SKU, in case it is dropped from a Final Cluster assortment. In other words, substitutable demand sales units gets transferred to other SKUs in a Final Cluster assortment.
WP DT Substitutable Demand Sales R	Refers to the respective replaceable sales retail for the substitutable sales units for an SKU in a Final Cluster assortment.
WP DT Demand Transferred %	Refers to that part of demand (sales units) that has been transferred from the SKU being dropped to the substitute SKUs in the final assortment for a cluster. It reflects the net demand transference - distribution amongst the substitute SKUs.

Assortment Quantification Summary Tab

This tab has one view.

Assortment Quantification Summary View

Use this view to review the targets being achieved by the assortment finalized for the cluster in the previous tab. This view contains measures like plan measures for Sales Units, Sales R, Gross Profit, Gross Profit %, and so on.

This view has one view and three measure profiles:

■ WP/CP

■ WP/LY

■ WP/Tgt

Figure 6–42   Assortment Quantification Summary WP/CP Measure Profile View

Table 6–39 lists the measures available in this view.

Table 6–39   Assortment Quantification Summary WP/CP Measure Profile Measures

Label	Definition
WP Assort Sales R	Assortment Planning @ Cluster Working Plan Assortment Sales Retail. Current approved sales revenue for the assortment obtained from a third party. The data is typically obtained quarterly.
WP Assort Sales U	Assortment Planning @ Cluster Working Plan Assortment Sales Units. Current approved sales units for the assortment obtained from a third party. The data is typically obtained quarterly.
WP Assort Sales AUR	Assortment Planning @ Cluster Working Plan Assortment Sales Average Unit Retail. Current approved sales average units retail for the assortment obtained from a third party. The data is typically obtained quarterly.
WP Assort Gross Profit R	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit Retail. Retail Sales minus Cost of Goods Sold.
WP Assort Gross Profit %	Category Planning and Assortment Planning @ Cluster Working Plan Gross Profit Percent. Retail Sales minus Last Year's Cost of Goods Sold divided by Retail Sales.
CP Assort Sales R	Assortment Planning @ Cluster Current Plan Assortment Sales Retail. The sales retail value of a working plan for an assortment.
CP Assort Sales U	Assortment Planning @ Cluster Current Plan Assortment Sales Units. Current approved sales units for the assortment obtained from a third party. The data is typically obtained quarterly.
CP Assort Sales AUR	Assortment Planning @ Cluster Current Plan Assortment Sales Average Unit Retail. Current approved sales average units retail for the assortment obtained from a third party. The data is typically obtained quarterly.
CP Assort Gross Profit R	Assortment Planning @ Cluster Current Plan Assortment Gross Profit Retail. The Retail Sales minus last year's Cost of Goods Sold.
CP Assort Gross Profit %	Assortment Planning @ Cluster Current Plan Assortment Gross Profit Percent. The Retail Sales divided by last year's Cost of Goods Sold.
WP Assort Sales var to CP R	Assortment Planning @ Cluster Working Plan Assortment Sales variance to Current Plan Retail.
WP Assort Sales var to CP U	Assortment Planning @ Cluster Working Plan Assortment Sales variance to Current Plan Units.
WP Assort Gross Profit var to CP R	Assortment Planning @ Cluster Working Plan Assortment Gross Profit variance to Current Plan Retail.
CP AS Combined Assort Sales R	Assortment Planning @ Cluster Current Plan Merged Store level Combined Sales Retail.
CP AS Combined Assort Sales U	Assortment Planning @ Cluster Current Plan Merged Store level Combined Sales Units.
CP AS Combined Assort Sales AUR	Assortment Planning @ Cluster Current Plan Merged Store level Combined Sales Average Unit Retail.
CP AS Combined Assort Gross Profit R	Assortment Planning @ Cluster Current Plan Merged Store level Combined Sales Retail.
CP AS Combined Assort Gross Profit %	Assortment Planning @ Cluster Current Plan Merged Store level Combined Sales Percent.

Figure 6–43   Assortment Quantification Summary WP/LY Measure Profile View

Table 6–40 lists the measures available in this view.

Table 6–40   Assortment Quantification Summary WP/LY Measure Profile Measures

Label	Definition
LY Assort Sales R	Assortment Planning @ Cluster Last Year Assortment Sales Retail. Last year's sales revenue for the assortment obtained from a third party. The data is typically obtained quarterly.
LY Assort Sales U	Assortment Planning @ Cluster Last Year Assortment Sales Units. Last year's sales units for the assortment obtained from a third party. The data is typically obtained quarterly.
LY Assort Sales AUR	Assortment Planning @ Cluster Last Year Assortment Sales Average Unit Retail. Last year's sales average units retail for the assortment obtained from a third party. The data is typically obtained quarterly.
LY Gross Profit R	Assortment Planning @ Cluster and Category Planning Last Year Gross Profit Retail. Last year's Retail Sales minus Last Year's Cost of Goods Sold.
LY Gross Profit %	Category Planning and Assortment Planning @ Cluster Last Year Gross Profit Percent. Last year's Retail Sales minus Last Year's Cost of Goods Sold divided by Last Year's Retail Sales.
WP Assort Sales R	Assortment Planning @ Cluster Working Plan Assortment Sales Retail. Current approved sales revenue for the assortment obtained from a third party. The data is typically obtained quarterly.
WP Assort Sales U	Assortment Planning @ Cluster Working Plan Assortment Sales Units. Current approved sales units for the assortment obtained from a third party. The data is typically obtained quarterly.
WP Assort Sales AUR	Assortment Planning @ Cluster Working Plan Assortment Sales Average Unit Retail. Current approved sales average units retail for the assortment obtained from a third party. The data is typically obtained quarterly.
WP Assort Gross Profit R	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit Retail. Retail Sales minus Cost of Goods Sold.

Table 6–40   (Cont.) Assortment Quantification Summary WP/LY Measure Profile

Label	Definition
WP Assort Gross Profit %	Category Planning and Assortment Planning @ Cluster Working Plan Gross Profit Percent. Retail Sales minus Cost of Goods Sold divided by Retail Sales.
WP Assort Sales var to LY R	Assortment Planning @ Cluster Working Plan Assortment Sales variance to Last Year Retail.
WP Assort Sales var to LY U	Assortment Planning @ Cluster Working Plan Assortment Sales variance to Last Year Units.
WP Assort Gross Profit var to LY R	Assortment Planning @ Cluster Working Plan Assortment Gross Profit variance to Last Year Retail.
WP AS Combined Assort Sales R	Assortment Planning @ Cluster Working Plan Merged Store level Combined Sales Retail.
WP AS Combined Assort Sales U	Assortment Planning @ Cluster Working Plan Merged Store level Combined Sales Units.
WP AS Combined Assort Sales AUR	Assortment Planning @ Cluster Working Plan Merged Store level Combined Sales Average Unit Retail.
WP AS Combined Assort Gross Profit R	Assortment Planning @ Cluster Working Plan Merged Store level Combined Sales Retail.
WP AS Combined Assort Gross Profit %	Assortment Planning @ Cluster Working Plan Merged Store level Combined Sales Percent.

Figure 6–44   Assortment Quantification Summary WP/CP Measure Profile View

Table 6–41 lists the measures available in this view.

Table 6–41   Assortment Quantification Summary WP/CP Measure Profile Measures

Label	Definition
Target Sales R	The desired sales revenue for the item by retailer that the retailer wishes to obtain.

Table 6–41   (Cont.) Assortment Quantification Summary WP/CP Measure Profile

Label	Definition
Target Sales U	The desired sales units for the item by retailer that the retailer wishes to obtain.
Target Sales AUR	The desired sales average units retail for the item by retailer that the retailer wishes to obtain.
Target Gross Profit R	The desired Plan Retail Sales minus respective (or approved plan) Cost of Goods Sold.
Target Gross Profit %	The Approved Plan Retail Sales minus respective (or approved plan) Cost of Goods Sold divided by Approved Plan Retail Sales.
WP Assort Sales R	Assortment Planning @ Cluster Working Plan Assortment Sales Retail. Current approved sales revenue for the assortment obtained from a third party. The data is typically obtained quarterly.
WP Assort Sales U	Assortment Planning @ Cluster Working Plan Assortment Sales Units. Current approved sales units for the assortment obtained from a third party. The data is typically obtained quarterly.
WP Assort Sales AUR	Assortment Planning @ Cluster Working Plan Assortment Sales Average Unit Retail. Current approved sales average units retail for the assortment obtained from a third party. The data is typically obtained quarterly.
WP Assort Gross Profit R	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit Retail. Retail Sales minus Cost of Goods Sold.
WP Assort Gross Profit %	Category Planning and Assortment Planning @ Cluster Working Plan Gross Profit Percent. Retail Sales minus Cost of Goods Sold divided by Retail Sales.
WP Assort Sales var to Tgt R	Assortment Planning @ Cluster Working Plan Assortment Sales variance to Target Retail.
WP Assort Sales var to Tgt U	Assortment Planning @ Cluster Working Plan Assortment Sales variance to Target Units.
WP Assort Gross Profit var to Tgt R	Assortment Planning @ Cluster Working Plan Assortment Gross Profit variance to Target Retail.
WP AS Combined Assort Sales R	Assortment Planning @ Cluster Working Plan Merged Store level Combined Sales Retail
WP AS Combined Assort Sales U	Assortment Planning @ Cluster Working Plan Merged Store level Combined Sales Units.
WP AS Combined Assort Sales AUR	Assortment Planning @ Cluster Working Plan Merged Store level Combined Sales Average Unit Retail.
WP AS Combined Assort Gross Profit R	Assortment Planning @ Cluster Working Plan Merged Store level Combined Sales Retail.
WP AS Combined Assort Gross Profit %	Assortment Planning @ Cluster Working Plan Merged Store level Combined Sales Percent.

Export to SO Cluster Tab

This view has two worksheets to fulfill the export assortment and category plan data for Oracle Retail Optimization Engine (OROE) module of ORASE (Oracle Advanced Science Engine).

Assortment Label and Location Filtering View

Use this view to select the trading area and plan (category plan and assortment plan) details (data) to be exported to the Oracle Retail Optimization Engine (OROE) module of ORASE (Oracle Advanced Science Engine) at the Cluster level.

Figure 6–45 Assortment Label and Location Filtering View
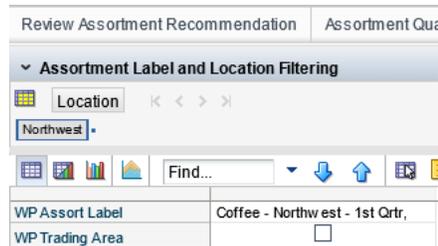
Table 6–42 lists the measures available in this view.

Table 6–42 Assortment Label and Location Filtering Measures

Label	Definition
WP Assort Label	The label displayed for a working plan assortment based on things like trading area, category, or consumer segment.
WP Trading Area	Specifies which trading areas are included in the export to ASO.

Request Type and Role Model View

Use this view to select the export request type and category role assignment model details (data) to be exported to the Oracle Retail Optimization Engine (OROE) module of ORASE (Oracle Advanced Science Engine) at the Cluster level. Once these selections have been made the Export to SO @ Cluster custom menu needs to be run.

Figure 6–46 Request Type and Role Model View
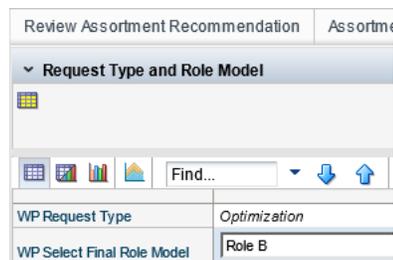
Table 6–43 lists the measures available in this view.

Table 6–43 Request Type and Role Model Measures

Label	Definition
WP Request Type	This is a drop-down selection measure used to select the purpose of export. The request type can be either assortment optimization request from a space management perspective and an update to ROE in the form of final approved assortment for eventual implementation.
WP Select Final Role Model	This is a drop-down selection measure used to select the category role assignment model whose data will be exported. There are two models available for category role assignment, that is, Model A and Model B.

Approve Assortment @ Cluster Tab

This tab has one view.

Approve Assortment View

Use this view to approve the final assortment for a specific cluster.

Figure 6–47   Approve Assortment View
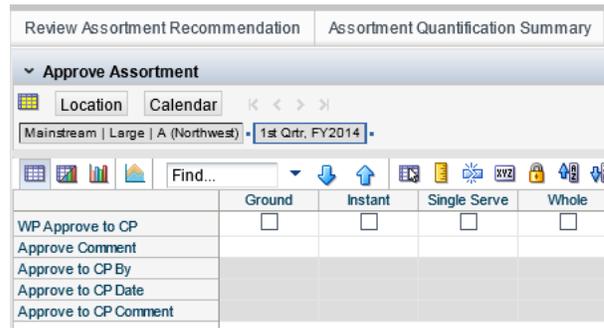
Table 6–44 lists the measures available in this view.

Table 6–44   Approve Assortment Measures

Label	Definition
WP Approve to CP	Assortment Planning @ Cluster Working Plan Approve Boolean. Boolean mask measure to control what is approved and not approved as the Current Plan.
Approve Comment	The comments made by the approver at the time of approving a specific plan (or an assortment) for the approval seeker to take a note of while executing the plan or working on other plans.
Approve to CP By	Assortment Planning @ Cluster Default Value Approve to CP User. The ID of the Category Manager that approved the Current Plan.
Approve to CP Date	Assortment Planning @ Cluster Default Value Approve to CP Date. The date a plan was approved as the Current Plan.
Approve to CP Comment	Assortment Planning @ Cluster Default Value Approve to CP Text. The comments made by the approver at the time of approving a specific plan to CP (or an assortment) for the approval seeker to take a note of while executing the plan or working on other plans.

7

Assortment Planning @ Store Task

This task enables a retailer to create assortment plans at the store level utilizing the concept of IPI. Demand Transference is then used to fine-tune the system recommended assortments based on IPI. Assortment plans for a store provide the flexibility to the retailer to create a store specific assortment to address store-specific requirements for a store which exhibits different patterns and traits in terms of different business parameters/measures as compared to the other stores in the neighboring clusters and stores in the trading area, in general. Prior to generating assortments, the user needs to do the complete the assortment setup pre-requisites.

This task has the following steps:

- Create IPI Assortment Step
- Assortment Finalization and Approval Step

Create IPI Assortment Step

Use this step to compute the IPI of each SKU for each of the clusters.

This step has the following tabs and views:

- Review IPI Criteria Tab
  - Review Focus Area Weights View
  - Review Metric Weights View
  - Review Attribute Weights View
  - Review Attribute Value Weights View
- Review IPI Scores Tab
  - Review Focus Area Score View
  - Review Consumer Segment Score View
  - Review IPI Score View
- Set IPI Threshold Scores Tab
  - Set IPI Assortment Threshold View
- Review IPI Assortment Recommendations Tab
  - Review DT Details @ Store View
  - Review IPI Assortment Recommendation View

Custom Menu

The following custom menus are available:

- Calc Store IPI Score-used to populate values for the views in the Review IPI Scores tab.

- Create IPI Assortment @ Store

- Seed AC Core /Optional

Review IPI Criteria Tab

The following figure shows the views for this tab.

Figure 7–1   Review IPI Criteria Tab Views
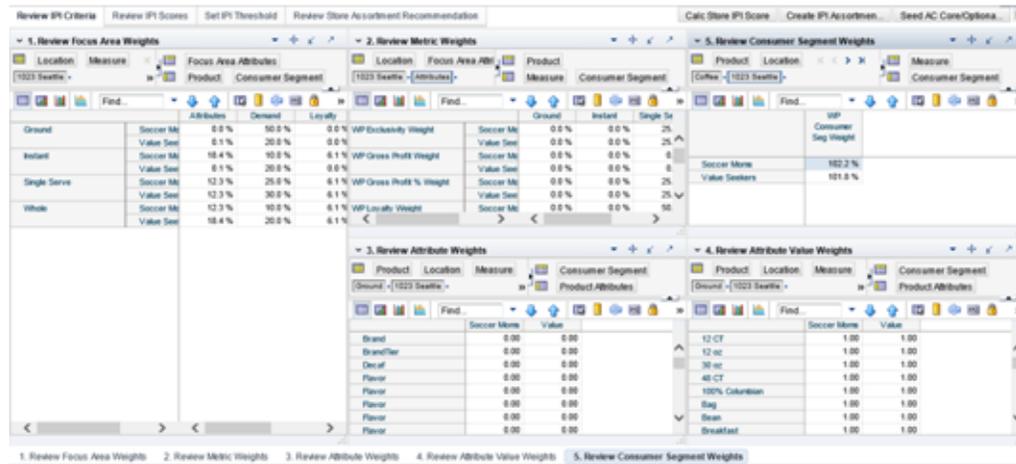
Review Focus Area Weights View

Use this view to review each strategy/focus area. A weight is assigned to each metric. In addition to these values being editable here, they can also be seeded with values set in IPI Setup and assignments made in Category Planning. For more information, see Chapter 4.

Figure 7–2   Review Focus Area Weights View

		Attributes	Demand	Loyalty	Market	Performance
Ground	Soccer Moms	0.0 %	50.0 %	0.0 %	0.0 %	24.5 %
	Value Seekers	0.1 %	20.0 %	0.0 %	6.1 %	18.4 %
Instant	Soccer Moms	18.4 %	10.0 %	6.1 %	0.0 %	0.0 %
	Value Seekers	0.1 %	20.0 %	0.0 %	6.1 %	18.4 %
Single Serve	Soccer Moms	12.3 %	25.0 %	6.1 %	6.1 %	0.0 %
	Value Seekers	12.3 %	30.0 %	6.1 %	6.1 %	0.0 %
Whole	Soccer Moms	12.3 %	10.0 %	6.1 %	6.1 %	0.0 %
	Value Seekers	18.4 %	20.0 %	6.1 %	0.0 %	0.0 %

Table 7–1 lists the measure available in this view.

Table 7–1   Review Focus Area Weights Measure

Label	Definition
WP Focus Area Weight	Assortment Planning @ Cluster Working Plan Focus Area Weight Value. The weightage assigned to individual focus areas for a particular product category.

Review Metric Weights View

Use this view to review the metric weights and groupings.

Figure 7–3   Review Metric Weights View

Table 7–2 lists the measure available in this view.

Table 7–2   Review Metric Weights Measures

Label	Definition
WP Exclusivity Weight	Assortment Planning @ Cluster Working Plan Exclusivity Weight Value. The weightage assigned to individual focus areas keeping in mind their exclusivity.
WP Gross Profit Weight	Assortment Planning @ Cluster Working Plan Gross Profit % Weight Value. The weightage assigned to individual focus areas keeping in mind their gross profit weight.
WP Gross Profit % Weight	Assortment Planning @ Cluster and Category Planning Working Plan Gross Profit Percent. Current approved Retail Sales minus Cost of Goods Sold divided by Retail Sales.
WP Loyalty Weight	Assortment Planning @ Cluster Working Plan Loyalty Weight Value. The weightage assigned to individual focus areas based on the loyalty associated with them.
WP Sales R Weight	Assortment Planning @ Cluster Working Plan Sales R Weight Value. The percentage weightage given to 'sales retail' metric for individual focus areas in IPI calculations.
WP Sales U Weight	Assortment Planning @ Cluster Working Plan Sales U Weight Value. The percentage weightage given to 'sales unit' metric for individual focus areas in IPI calculations.
WP Switching Weight	Assortment Planning @ Cluster Working Plan Switching Weight Value.
WP Worth Weight	Assortment Planning @ Cluster Working Plan Worth Weight Value.

Review Attribute Weights View

Use this view to review the attribute weights and groupings.

Figure 7–4   Review Attribute Weights View

Table 7–3 lists the measure available in this view.

Table 7–3   Review Attribute Weights Measure

Label	Definition
Wp Attribute Name Weight	Assortment Planning @ Cluster Working Plan Attribute Name Weight Value.

Review Attribute Value Weights View

Use this view to review the attribute value weights and groupings.

Figure 7–5   Review Attribute Value Weights View

Table 7–4 lists the measure available in this view.

Table 7–4   Review Attribute Value Weights Measure

Label	Definition
WP Attribute Value Weight	The percentage of weightage assigned for the attribute values' IPI calculations.

Use the Review Consumer Segment Weights view to view the seeded consumer segment weights from the Admin. Consumer segment weights are used in IPI calculations.

Figure 7–6   Review Consumer Segment Weights View
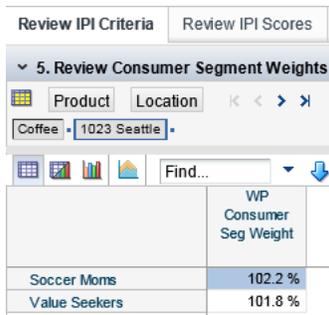
Table 7–5 lists the measure available in this view.

Table 7–5   Review Consumer Segment Weights Measures

Label	Definition
WP Consumer Seg Weight	Assortment Planning @ Cluster Working Plan Consumer Segment Weight Value.

Review IPI Scores Tab

This tab has three views. The following figure shows these views.

Figure 7–7   Review IPI Scores Tab View
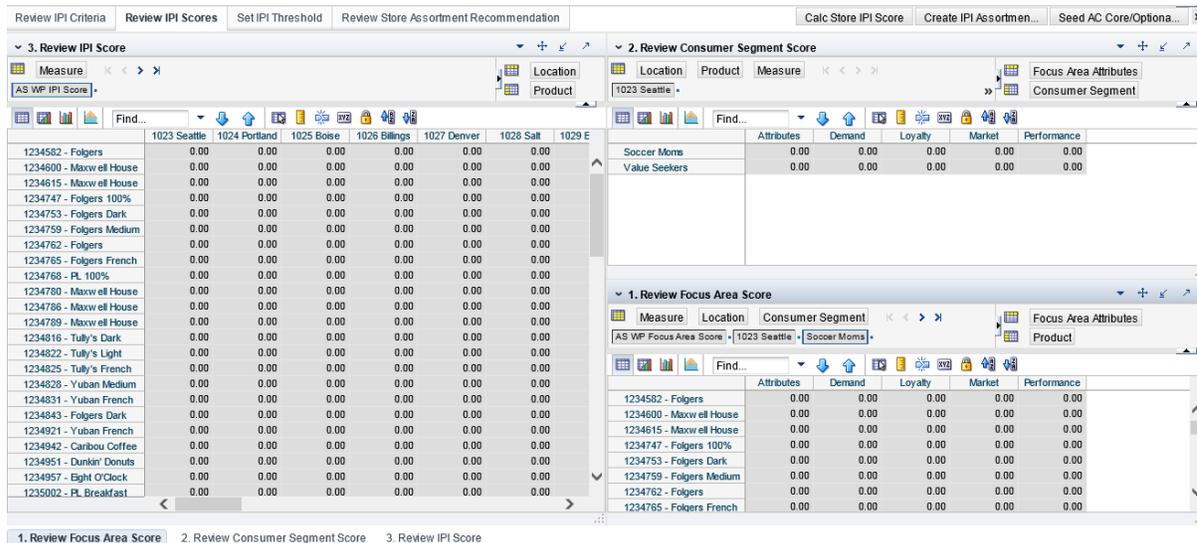
Review Focus Area Score View

Use this view to see the focus area scores:

■ Within each of the focus areas, a score is computed for each assigned assortment metric. This IPI score is based on the assortment metric value as a ratio of the mean value.

■ The focus area score, for each of the focus areas, is an IPI computed as a composite IPI based on the relative weight of the metrics.

At this point, you can use the custom menu Calc Cluster IPI Score to populate values in the next few views.

Figure 7–8   Review Focus Area Score View

Table 7–6 lists the measure available in this view.

Table 7–6   Review Focus Area IPI Scores Measure

Label	Definition
AS WP Focus Area Score	Assortment Planning @ Store Working Plan Focus Area Score Value. IPI score for items purely based on individual focus area perspective.

Review Consumer Segment Score View

Use this view to see the consumer segment scores. Each consumer segment score is computed per the consumer segment/trading area based on the weights of the focus areas. A cluster score is then computed based on the relative weight of the consumer segments in each cluster.

Figure 7–9   Review Consumer Segment Score View

Table 7–7 lists the measure available in this view.

Table 7–7   Review Consumer Segment Score Measure

Label	Definition
AS WP Consumer Segment Score	Assortment Planning @ Store Working Plan Consumer Segment Score Value. The unit cost associated with any item at week/SKU/store intersection, which is calculated or derived from Retail Sales and Gross Profit.

Review IPI Score View

Use this view to see the IPI scores. Each consumer segment score is computed per the IPI based on the weights of the focus areas. A cluster score is then computed based on the relative weight of the calculated IPI's in each cluster.

Figure 7–10   Review IPI Score View

Table 7–8 lists the measures available in this view.

Table 7–8   Review IPI Score Measures

Label	Definition
AS WP IPI Score	Assortment Planning @ Store Working Plan IPI Score Value.
AS WP IPI Rank	Assortment Planning @ Store IPI Rank assigned to an item based on its IPI score.

Set IPI Threshold Scores Tab

This tab has one view.

Set IPI Assortment Threshold View

Use this view to define thresholds for each sub-category. This screen is similar in function to the Set IPI Threshold view in the Create IPI Assortment step in Assortment Planning @Cluster task. Here, the thresholds are set for IPIs. These thresholds determine which items are included or excluded from the assortment calculated based on IPI scores. It also facilitates identification of core and optional items in the IPI-based assortment.

Figure 7–11   Set IPI Assortment Threshold View

Table 7–9 lists the measures available in this view.

Table 7–9   Set IPI Assortment Threshold Measures

Label	Definition
WP IPI Core Cutoff Index	Assortment Planning @ Store Working Plan IPI Core Cutoff Index. The cut-off or threshold contribution for any item to be classified as a core item in the assortment.
WP IPI Optn Cutoff Index	Assortment Planning @ Store Working Plan IPI Optional Cutoff Index. The cut-off or threshold contribution for any item to be classified as an optional item in the assortment.

Table 7–9   (Cont.) Set IPI Assortment Threshold Measures

Label	Definition
AS WP Create IPI Assortment	Assortment Planning @ Store Working Plan Create IPI Assortment Boolean. Creates an IPI assortment matching as many constraints as possible.

Review IPI Assortment Recommendations Tab

This tab has two views.

Review DT Details @ Store View

Use this view to review the Demand Transference distribution details of any SKU/Item in the Review Store Assortment Recommendation view.

Figure 7–12   Review DT Details @ Store View

Table 7–10 lists the measures available in this view.

Table 7–10   Review DT Details@ Store Measures

Label	Definition
ASDT Demand Sales Received %	Refers to a percentage of total sales units of an SKU, getting transferred from it and being received by its respective Substitute SKUs in a Final Cluster assortment. It is expressed as 'percentage of total sales of the SKUs.
AS WP DT Substitutable Demand Sales U	Refers to the replaceable sales units of an SKU, in case it is dropped from a Store assortment. In other words, substitutable demand sales units gets transferred to other SKUs in a Store assortment.
AS WP DT Substitutable Demand Sales R	Refers to the respective replaceable sales retail for the substitutable sales units for an SKU in a Store assortment.
AS WP Assort Sales R	Assortment Planning @ Store Working Plan Assortment Sales Retail. Current store level approved sales revenue for the assortment obtained from a third party. The data is typically obtained quarterly.
AS WP Assort Sales U	Current store level approved sales units for the assortment obtained from a third party. The data is typically obtained quarterly.
AS WP DT Demand Transferred %	Assortment Planning @ Store reference to that part of demand (sales units) that has been transferred from the SKU being dropped to the substitute SKUs in IPI based assortment for a cluster. It reflects the net demand transference - distribution amongst the substitute SKUs.

Review IPI Assortment Recommendation View

Use this view to review the final system recommended assortment at the store level. It contains the list of items in the IPI-based system recommended assortment.

Figure 7–13   Review Store Assortment Recommendation View 1

Table 7–11 lists the measures available in this view.

Table 7–11   Review Store Assortment Recommendation View 1 Measures

Label	Definition
AS WP IPI Rank	Assortment Planning @ Store Working Plan IPI Rank. IPI Rank assigned to an item in based on its IPI score
AS WP Mandatory for Assortment	Assortment Planning @ Store Working Plan Mandatory for Assortment Boolean.
AS IPI Core Recommended	Assortment Planning @ Store Default Value IPI Core Boolean.
AS IPI Optn Recommended	Assortment Planning @ Store Default Value IPI Optional Boolean.
AS IPI Core Recommended Count	Assortment Planning @ Store Default Value IPI Core Count.
AS IPI Optn Recommended Count	Assortment Planning @ Store Default Value IPI Optional Count.
AS WP Assort Core	Assortment Planning @ Store Working Plan Final Assortment Core Boolean.
AS WP Assort Optn	Assortment Planning @ Store Working Plan Final Assortment Optional Boolean.
AS Assort Core/Optn Error	Assortment Planning @ Store sefault Value Error measure if both Core and Optional measures are set to true for an item in a Store Assortment.
AS WP Assort Core Count	The number of core SKUs in working plan's store assortment.
AS WP Assort Optn Count	The number of optional SKUs in working plan's store assortment.

Table 7–11   (Cont.) Review Store Assortment Recommendation View 1 Measures

Label	Definition
AS WP % Contribution of Category Itens	Assortment Planning @ Store Working Plan % Contribution of Category Items Percent. The contribution of an item or a set of items under a category towards the whole category.
AS WP Assort Core	Assortment Planning @ Store Working Plan Final Assortment Core Boolean.
AS WP Assort Optn	Assortment Planning @ Store Working Plan Final Assortment Optional Boolean.
AS WP Assort Core Count	The number of core SKUs in working plan's store assortment.
AS WP Assort Optn Count	The number of optional SKUs in working plan's store assortment.
AS WP Final Assort Compare to LY	Keep or Add or Drop decision on comparing a store assortment with the LY store assortment.
AS WP Final Assort Compare to CP	Keep or Add or Drop decision on comparing a store assortment with the Current Plan store assortment.

Figure 7–14   Review Store Assortment Recommendation View 2

Table 7–12 lists the measures available in this view.

Table 7–12   Review Store Assortment Recommendation View 2 Measures

Label	Definition
AS DT K/A/D Input	This field provides an option to the user to decide the assortment with which the comparison should be done to calculate Keep, Add or Drop actions for this assortment. This measure is specific for IPI based assortment.

Table 7–12   (Cont.) Review Store Assortment Recommendation View 2 Measures

Label	Definition
AS WP Use DT Sales	Flag measure to indicate if WP Assort Sales in the final store assortment should be populated by updated demand (DT Affected Sales). If it is ticked then it will populate the AS WP Assort Sales with DT Sales else AS WP Assort Sales will be populated by AS WP Sales.
AS WP Assort Sales U	Current store level approved sales units for the assortment obtained from a third party. The data is typically obtained quarterly.
AS WP Assort Sales R	Assortment Planning @ Store Working Plan Assortment Sales Retail. Current store level approved sales revenue for the assortment obtained from a third party. The data is typically obtained quarterly.
AS WP DT Assort Sales U	Updated (or DT Affected) Demand Sales Units specifically for store assortment. It is looked at vis-à-vis baseline demand sales units (WP IPI Assort Sales U) to see the DT impact on an assortment with assortment changes.
AS WP DT Assort Sales R	Updated (or DT Affected) Demand Sales Retail specifically for store assortment. It is looked at vis-à-vis baseline demand sales retail (WP IPI Assort Sales R) to see the DT impact on an assortment with assortment changes.
AS DT No of Significant Substitute SKUs	Refers to the count of SKUs which can absorb the significant chunk of substitutable demand of an SKU in a Store assortment.
AS WP DT Substitutable Demand Sales U	Refers to irreplaceable sales of an item, in case it is dropped from an assortment. In other words, as the name suggests, this quantum of sales is lost and does not get transferred to other SKUs in an assortment.
AS WP DT Substitutable Demand Sales R	Refers to the respective replaceable sales retail for the substitutable sales units for an SKU in an assortment.
AS WP DT Demand Transferred %	Refers to that part of demand (sales units) that has been transferred from the SKU being dropped to the substitute SKUs in a store assortment for a cluster. It reflects the net demand transference - distribution amongst the substitute SKUs.
AS WP DT Lost Demand Sales U	Refers to irreplaceable sales of an item, in case it is dropped from an assortment. In other words, as the name suggests, this quantum of sales is lost and does not get transferred to other SKUs in an assortment.
AS WP DT Lost Demand Sales R	Refers to the respective irreplaceable sales retail for lost demand sales retail for an SKU in an assortment.
AS WP Gross Profit %	Assortment Planning @ Store Working Plan Gross Profit Percent. Current approved Retail Sales minus Cost of Goods Sold divided by Retail Sales.
AS WP Gross Profit R	Assortment Planning @ Store Working Plan Gross Profit Retail. Used only in IPI calculations. The current Retail Sales minus Last Year's Cost of Goods Sold.
AS WP DT Gross Profit R	The updated (DT Affected) demand's Gross Profit Retail corresponding to Updated Sales Units/ Retail for a Store assortment. In other words it is the updated Gross Profit Retail. It is looked vis-à-vis baseline Gross Profit Retail to assess the DT impact due to assortment changes to a Store assortment.

Assortment Finalization and Approval Step

Use this step to finalize and approve the assortment at the Store level.

This step has the following tabs and views:

- Assortment Quantification Summary Tab
  - Assortment Quantification Summary View
- Export to SO Cluster Tab
  - Assortment Label and Location Filtering View
  - Request Type and Role Model View
- Approve Store Assortment Tab
  - Approve Store Assortment View

Assortment Quantification Summary Tab

This view has one view and two measure profiles:

- WP/CP
- WP/LY

Assortment Quantification Summary View

Use this view to review the targets being achieved by the assortment finalized for the store in the previous tab. This view contains measures like plan measures for Sales Units, Sales R, Gross Profit, Gross Profit %, and so on.

Figure 7–15   Assortment Quantification Summary WP/CP Measure Profile View

Table 7–13 lists the measures available in this view.

Table 7–13   Assortment Quantification Summary WP/CP Measure Profile Measures

Label	Definition
AS CP Assort Sales R	Assortment Planning @Store and Category Planning Assortment Sales Retail. Current approved sales revenue for the assortment obtained from a third party. The data is typically obtained quarterly.

Table 7–13   (Cont.) Assortment Quantification Summary WP/CP Measure Profile

Label	Definition
AS CP Assort Sales U	Assortment Planning @ Store and Category Planning Assortment Sales Units. Current approved sales units for the assortment obtained from a third party. The data is typically obtained quarterly.
AS CP Assort Sales AUR	Assortment Planning @Store and Category Planning Assortment Sales Average Unit Retail. Current approved sales average units retail for the assortment obtained from a third party. The data is typically obtained quarterly.
AS CP Assort Gross Profit R	Assortment Planning @ Store and Category Planning Working Plan Gross Profit Retail. Retail Sales minus Cost of Goods Sold.
AS CP Assort Gross Profit %	Category Planning and Assortment Planning @ Store Gross Profit Percent. Retail Sales minus Last Year's Cost of Goods Sold divided by Retail Sales.
AS WP Assort Sales R	Assortment Planning @ Store Working Plan Assortment Sales Retail. The sales retail value of a working plan for an assortment.
AS WP Assort Sales U	Assortment Planning @ Store Working Plan Assortment Sales Units. Approved sales units for the assortment obtained from a third party. The data is typically obtained quarterly.
AS WP Assort Sales AUR	Assortment Planning @ Store Working Plan Assortment Sales Average Unit Retail. Approved sales average units retail for the assortment obtained from a third party. The data is typically obtained quarterly.
AS WP Assort Gross Profit R	Assortment Planning @ Store Working Plan Assortment Gross Profit Retail. The Retail Sales minus last year's Cost of Goods Sold.
AS WP Assort Gross Profit %	Assortment Planning @ Store Current Plan Assortment Gross Profit Percent. The Retail Sales divided by last year's Cost of Goods Sold.
AS WP Assort Sales var to CP R	Assortment Planning @ Store Working Plan Assortment Sales variance to Current Plan Retail.
AS WP Assort Sales var to CP U	Assortment Planning @ Store Working Plan Assortment Sales variance to Current Plan Units.
AS WP Assort Gross Profit var to CP R	Assortment Planning @ Store Working Plan Assortment Gross Profit variance to Current Plan Retail.

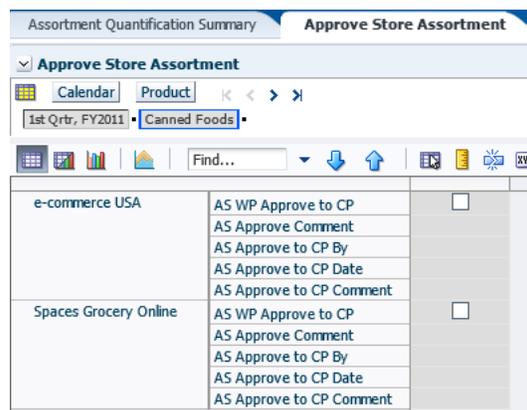*Figure 7–16   Assortment Quantification Summary WP/LY Measure Profile View*

Table 7–14 lists the measures available in this view.

Table 7–14   Assortment Quantification Summary WP/LY Measure Profile Measures

Label	Definition
AS LY Assort Sales R	Assortment Planning @ Store Last Year Assortment Sales Retail. Last year's sales revenue for the assortment obtained from a third party. The data is typically obtained quarterly.
AS LY Assort Sales U	Assortment Planning @ Store Last Year Assortment Sales Units. Last year's sales units for the assortment obtained from a third party. The data is typically obtained quarterly.
AS LY Assort Sales AUR	Assortment Planning @ Store Last Year Assortment Sales Average Unit Retail. Last year's sales average units retail for the assortment obtained from a third party. The data is typically obtained quarterly.
AS LY Assort Gross Profit R	Assortment Planning @ Store Last Year Gross Profit Retail. Last Year Retail Sales minus Last Year Cost of Goods Sold.
AS LY Assort Gross Profit %	Assortment Planning @ Store Last Year Gross Profit Percent. Last Year Retail Sales minus Last Year Cost of Goods Sold divided by Last Year Retail Sales.
AS WP Assort Sales R	Assortment Planning @ Store Working Plan Assortment Sales Retail. Approved sales revenue for the assortment obtained from a third party. The data is typically obtained quarterly.
AS WP Assort Sales U	Assortment Planning @ Store Working Plan Assortment Sales Units. Current approved sales units for the assortment obtained from a third party. The data is typically obtained quarterly.
AS WP Assort Sales AUR	Assortment Planning @ Store Working Plan Assortment Sales Average Unit Retail. Current approved sales average units retail for the assortment obtained from a third party. The data is typically obtained quarterly.
AS WP Assort Gross Profit R	Assortment Planning @ Store Working Plan Gross Profit Retail. Retail Sales minus Cost of Goods Sold.
AS WP Assort Gross Profit %	Assortment Planning @ Store Working Plan Gross Profit Percent. Retail Sales minus Cost of Goods Sold divided by Retail Sales.
AS WP Assort Sales var to LY R	Assortment Planning @ Store Working Plan Assortment Sales variance to Last Year Retail.
AS WP Assort Sales var to LY U	Assortment Planning @ Store Working Plan Assortment Sales variance to Last Year Units.
AS WP Assort Gross Profit var to LY R	Assortment Planning @ Store Working Plan Assortment Gross Profit variance to Last Year Retail.

Export to SO Cluster Tab

This view has two views.

Assortment Label and Location Filtering View

Use this view to select the location and respective assortment to be exported to Oracle Retail Optimization Engine (OROE) module of ORASE (Oracle Advanced Science Engine) at the cluster level.
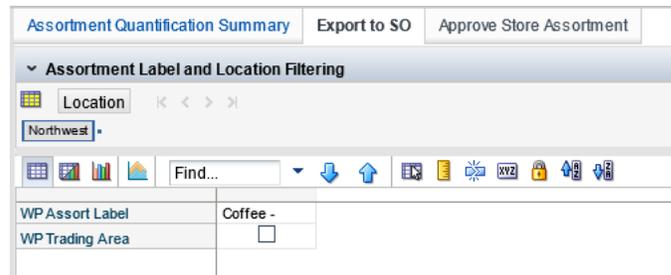
Figure 7–17   Assortment Label and Location Filtering View

Table 7–15 lists the measures available in this view.

Table 7–15   Assortment Label and Location Filtering Measures

Label	Definition
WP Assort Label	The label displayed for an assortment based on things like trading area, category, or consumer segment.
WP Trading Area	The area around a store in which the store derives most of its business as defined by syndicated data suppliers (Nielsen and IRI).

Request Type and Role Model View

Use this view to select the export request type and category role assignment model to be exported to the Oracle Retail Optimization Engine (OROE) module of ORASE (Oracle Advanced Science Engine) at the store level. Once these selections have been made the custom menu- Export to SO @ Store needs to be run.
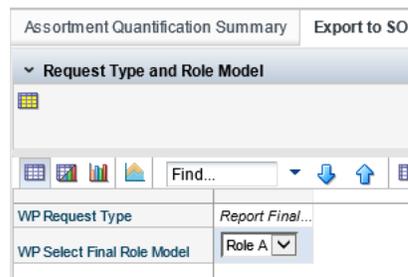
Figure 7–18   Request Type and Role Model View

Table 7–16 lists the measures available in this view.

Table 7–16   Request Type and Role Model Measures

Label	Definition
WP Request Type	This is a drop-down selection measure used to select the purpose of export from RCM to the Oracle Retail Optimization Engine (OROE) module of ORASE. The request type can be either assortment optimization request from a space management perspective and an update to OROE in the form of final approved assortment for eventual implementation.
WP Select Final Role Model	This is a drop-down selection measure used to select the category role assignment model whose data will be exported from RCM to OROE. There are two models available for category role assignment, that is, Model A and Model B.

Approve Store Assortment Tab

This tab has one view.

Approve Store Assortment View

Use this view to approve the final assortment for a specific store.
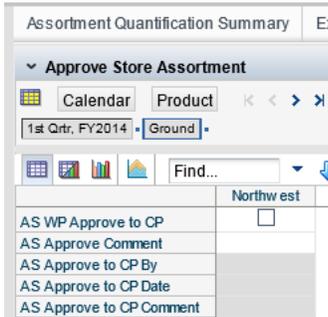
Figure 7–19   Approve Store Assortment View

Table 7–17 lists the measures available in this view.

Table 7–17   Approve Store Assortment Measures

Label	Definition
AS WP Approve to CP	Assortment Planning @ Store Working Plan Approve Boolean. Boolean mask measure to control what is approved and not approved as the Current Plan.
AS Approve Comment	The comments made by the approver at the time of approving a specific plan (or an assortment) for the approval seeker to take a note of while executing the plan or working on other plans.
AS Approve to CP By	Assortment Planning @ Store Default Value Approve to CP User. The ID of the Category Manager that approved the Current Plan.
AS Approve to CP Date	Assortment Planning @ Store Default Value Approve to CP Date. The date a plan was approved as the Current Plan.
AS Approve to CP Comment	Assortment Planning @ Store Default Value Approve to CP Text. The comments made by the approver at the time of approving a specific plan to CP (or an assortment) for the approval seeker to take a note of while executing the plan or working on other plans.