

# **Oracle® Retail Category Management**

User Guide for the RPAS Fusion Client

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Oracle Retail Category Management User Guide for the RPAS Fusion Client, Release 14.1

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- Did you understand the context of the procedures?
- Did you find any errors in the information?
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- Do you need different information or graphics? If so, where, and in what format?
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If you find any errors or have any other suggestions for improvement, then please tell us your name, the name of the company who has licensed our products, the title and part number of the documentation and the chapter, section, and page number (if available).

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# Preface

This document 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 document is for users and administrators of Oracle Retail Category Management. This includes merchandisers, buyers, business analysts, and administrative personnel.

## Documentation Accessibility

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## Related Documents

For more information, see the following documents in the Oracle Retail Category Management Release 14.1 documentation set:

- *Oracle Retail Batch Script Architecture Implementation Guide*
- *Oracle Retail Category Management Implementation Guide*
- *Oracle Retail Category Management Installation Guide*
- *Oracle Retail Category Management Release Notes*

## Customer Support

To contact Oracle Customer Support, access My Oracle Support at the following URL: <https://support.oracle.com>

When contacting Customer Support, please provide the following:

- Product version and program/module name

- 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

## Review Patch Documentation

When you install the application for the first time, you install either a base release (for example, 14.1) or a later patch release (for example, 14.1.1). If you are installing the base release or additional patches, read the documentation for all releases that have occurred since the base release before you begin installation. Documentation for patch releases can contain critical information related to the base release, as well as information about code changes since the base release.

## 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.

This process will prevent delays in making critical corrections available to customers. For the customer, it means that before you begin installation, you must verify that you have the most recent version of the Oracle Retail documentation set. Oracle Retail documentation is available on the Oracle Technology Network at the following URL:

<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.

If a more recent version of a document is available, that version supersedes all previous versions.

## Oracle Retail Documentation on the Oracle Technology Network

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

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

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

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

## Conventions

The following text conventions are used in this document:

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



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## Introduction

Category Management practice in the retail industry is a key business process which determines the success of a retailer's business. Category Management involves managing individual product categories as independent strategic business units (SBU), in a systematic and disciplined way, with each product category playing a specific role in the retailer's goal to achieve larger, established business objectives. It determines the variety, nature, and presentation of merchandise and the retailer's offers, which define a customer's in-store, in-channel experience, which holds the utmost importance in determining the retailer's success.

Conceptually, Category Management practice consists of the following actions:

1. Understand and assess the retailer's business:
  - Market-place analysis: Market analysis involving the assessment of consumer demographics, psychographics, market structure, and key market forces to gauge the business potential of individual product categories and business as a whole.
  - Product and consumer analysis: Category level and cross-category performance analysis with consumer segment level insights at various points to understand the intricacies of the retailer's business, identify the target consumer segments contributing to the retailer's business, and shape the category plans and assortment plans accordingly.
  - Competitor analysis: Assessment of the retailer's standing in the market in comparison to the competition.
2. Review the retailer's macro-strategy and assign roles, strategies, and tactics to product categories across the retail chain.
3. Create sales, gross profit, and inventory plans for national brands and private labels. Determine pricing, promotion, and supplier strategies for product categories in the form of category plans.
4. Allocate optimal space at the macro (department/category/sub-category level) and micro-levels (SKU level) per the retailer's macro-strategy.
5. Create assortment plans that define the product-mix and business targets for product categories.

Oracle Retail Category Management (RCM) supports the development of category plans, macro space optimization, assortment plans, and space optimization of assortments. It broadly follows the traditional eight-step Category Management business process, with the inclusion of the consumer segment perspective across various points in the process flow. Most importantly, the application provides a structured, measured set of activities designed to achieve specific business objectives:

- 
- The Category Planning task enables the retailer to create high-level qualitative and quantitative business plans at the trading area level.
  - The Macro Space Optimization tasks facilitate the creation of macro-space plans for optimal space productivity.
  - The Assortment Planning tasks facilitate the creation of SKU-level assortment plans at the cluster and store level across the retail chain.

The RCM application consists of the following tasks:

- **Category Planning:** Used to analyze a retailer's business across product categories and within a category, from a market, competition, and consumer perspective. Category Planning is used to set business targets and assign roles, strategies, and tactics for individual product categories at the trading area level.
- **Macro Space Optimization @Dept:** Used to allocate optimal space to different departments based on the historical relationship between space and profit. This helps determine the macro-space plan at the department level, specifications for store layouts, shelves, and fixtures, and merchandising techniques, thereby, facilitating efficient utilization of the available space by the retailer.
- **Macro Space Optimization @Sub-Category:** Used to allocate optimal space to different sub-categories, under a department, to efficiently use the available space at this level. This helps in determining the planogram design and merchandising method at the sub-category level.
- **Assortment Planning Analysis:** Used to analyze an assortment's historic performance from a market, competition, and consumer perspective at an item level. It also provides an insight into the trends, market composition, and market structure from a competition and consumer segment perspective. It is used to review roles, strategies, and tactics from the Category Plan and targets from both the Category Plan and Merchandise Financial Plan. Visibility to roles, strategies, tactics, and financial targets in assortment planning ensures that SKU/item level assortments align back to the overall category-level objectives.
- **Assortment Planning @ Cluster:** Used to create, analyze, adjust, and finalize assortment plans at the cluster level. Assortment plans are created using Item Priority Index (IPI) and Market Coverage based methods. The functionality of Demand Transference, Assortment Improvement, and Incremental Curve are used to fine tune and optimize draft assortments. Integration with Assortment and Space Optimization (ASO), an Oracle Retail Advanced Science (ORASE) solution, is utilized align assortments to the space available for optimal space productivity.
- **Assortment Planning @ Store:** Used to create, adjust, review, and approve custom assortment plans at the store level utilizing IPI-based assortments, Demand Transference, and ASO.

Following are the key highlights of the application:

- Provides a platform to analyze consumer and market insights available in the form of syndicated data, provided by third parties, such as, Nielsen and IRI. Consumer segment level insights for the retailer's business can be also be sourced from the retailer's loyalty program data.
- Analysis of market structure by viewing the consumer segments among the shoppers and evaluating the business opportunity in a trading area.
- Performance analysis of individual product categories, based on various retail business parameters, as compared to the market in general and the competition in particular.

- Creation of category plans with business targets in terms of different sales, gross profit, inventory parameters with role assignments to individual product categories, and a blueprint for strategic and tactical action within a category and across categories.
- Macro Space Optimization, at the department and sub-category level, to allocate optimum space to different product categories and improve space productivity.
- Integration with ORASE to source optimized store clusters (assortment clusters), Consumer Decision Trees (CDTs), product attributes, and demand transference insights. CDTs can also be sourced from an external source, such as a supplier or third-party vendor. Consumer segmentation, clustering of stores, and CDTs are utilized to tailor assortments to specific markets across geographies and channels.
- System-recommended target-focused assortments can be generated using IPI and Market Coverage-based approaches through user-defined constraints.
- Creation of assortment plans, at the cluster and store level, in alignment with Category Plans and Merchandise Financial Plans created through user-defined target-constrained assortment generation.
- Demand Transference, based on advanced science insights, to manually fine tune and refine assortment plans by reviewing demand shifts between SKUs with changes in assortment.
- The functionality of Incremental Curves, to arrive at an appropriate assortment range for product categories by identifying the point at which the cannibalization of sales between products in an assortment begins.
- Assortment Improvement, based on the concept of Demand Transference, automates the refinement of assortment plan parameters such as sales retail, sales units, or gross profit based on user-defined constraints.
- Space optimization of assortments through the integration with ASO to generate actionable and optimal assortments per the available space at the stores.
- Publication of final assortment plans for execution and implementation.

Note that the previously mentioned activities, part of the Category Management application, are performed at different levels of the product and location hierarchies. This facilitates customized Category Management planning across the retail chain.

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**Note:** Product Category or Merchandise Category refers to Class in Oracle Retail Merchandising System (RMS) terminology. Similarly, Sub-Category refers to Sub-Class.

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## Category Management Activities

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

- Category Management Planning activity:
  - Category Planning  
For more information, see [Chapter 4](#).
  - Macro Space Optimization @ Dept  
For more information, see [Chapter 5](#).
  - Macro Space Optimization @ Sub-Category  
For more information, see [Chapter 6](#).

- Assortment Planning Analysis  
For more information see [Chapter 7](#).
- Assortment Planning @ Cluster task  
For more information, see [Chapter 8](#).
- Assortment Planning @ Store  
For more information, see [Chapter 9](#).
- Category Management Administration activity:
  - Category Management Administration  
For more information, see [Chapter 3](#).
  - CDT Editor  
For more information, see [Chapter 2](#).

## Solution Task Flows

Figure 1-1 illustrates the task flow for the Category Planning task. The Category Planning task facilitates the creation of a category business plan at the sub-category level along with roles, strategies, and tactics assignment to product categories. It also presents various views for consumer, market, and competitor analysis.

**Figure 1-1 Category Planning Task Flow**

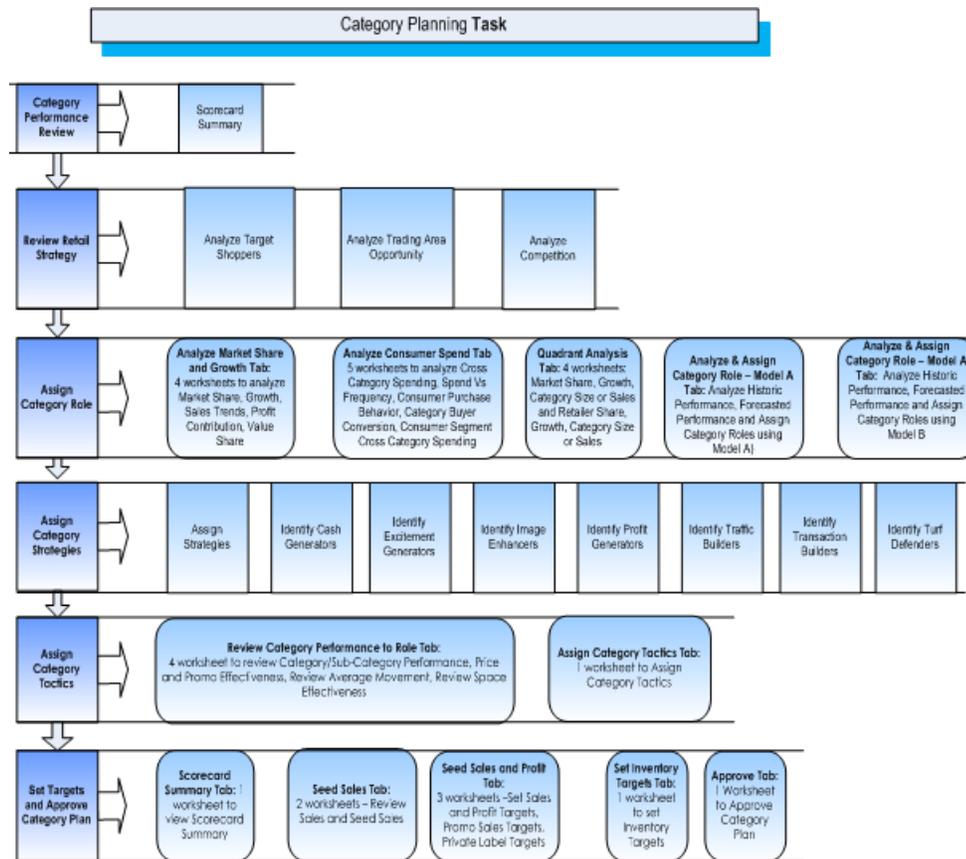


Figure 1–2 illustrates the task flow for the Macro Space Optimization @Dept task. This task presents category scorecard review, setup and review of optimization results, and approval of MSO results at the department level.

**Figure 1–2 Macro Space Optimization @Dept Task Flow**

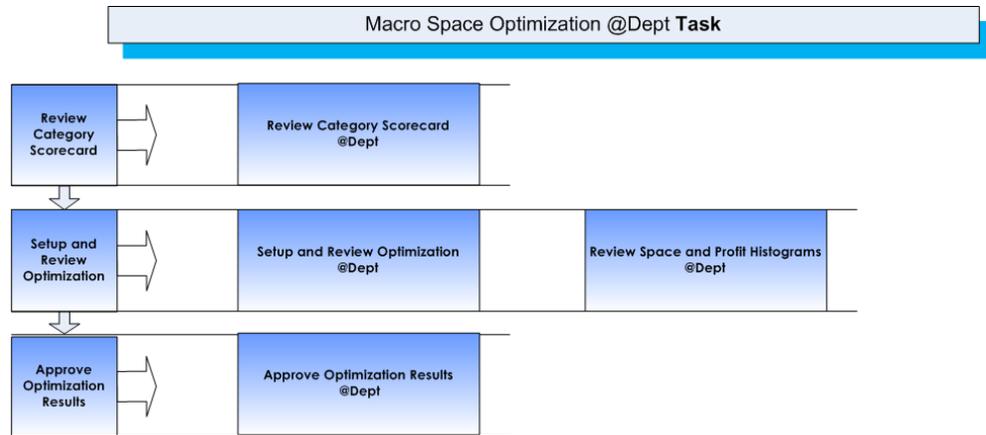


Figure 1–3 illustrates the task flow for the Macro Space Optimization @Sub-Category task. This task presents category scorecard review, setup and review of optimization results, and approval of MSO results at the POG sub-category level.

**Figure 1–3 Macro Space Optimization @Sub-Category Task Flow**

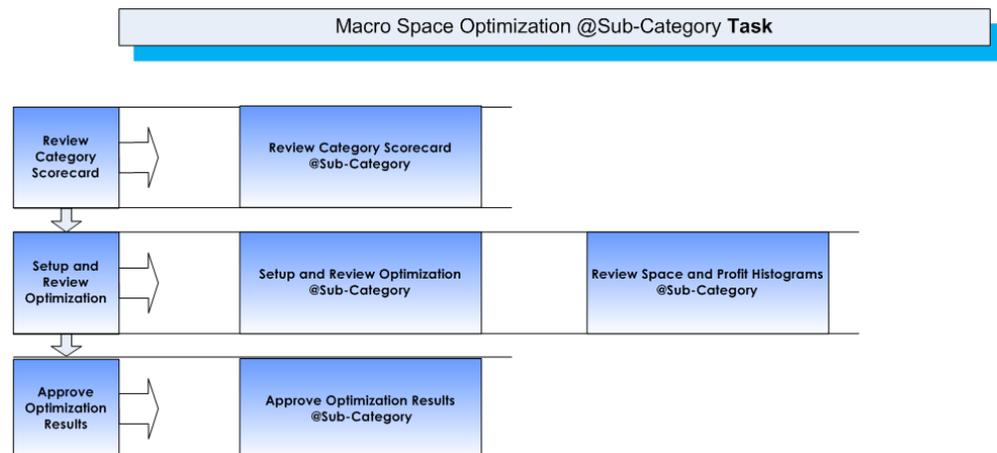


Figure 1–4 illustrates the task flow for the Assortment Planning Analysis task. This task presents performance, market, and consumer analysis at the item level. It also presents roles, strategies, tactics, and targets from the category plan and targets from the merchandise financial plan for the assortment planning to begin.

**Figure 1–4 Assortment Planning Analysis Task Flow**

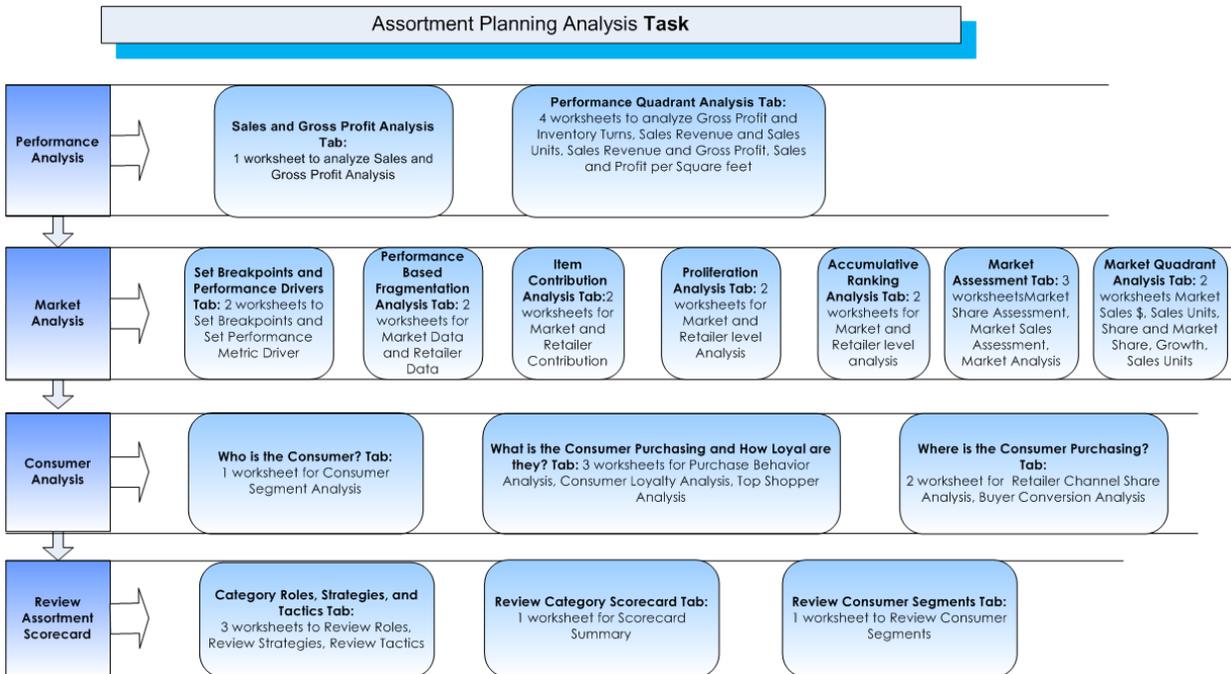


Figure 1–5 illustrates the task flow for the Assortment Planning @ Cluster task. This task begins with assortment setup for the assortment planning involving seeding of working plans, setting assortment eligible and mandatory items, and then defining the assortment constraints to generate system-recommended assortments using:

1. IPI-based assortment method
2. Market Coverage-based assortment method

Figure 1-5 Assortment Planning @ Cluster Task Flow

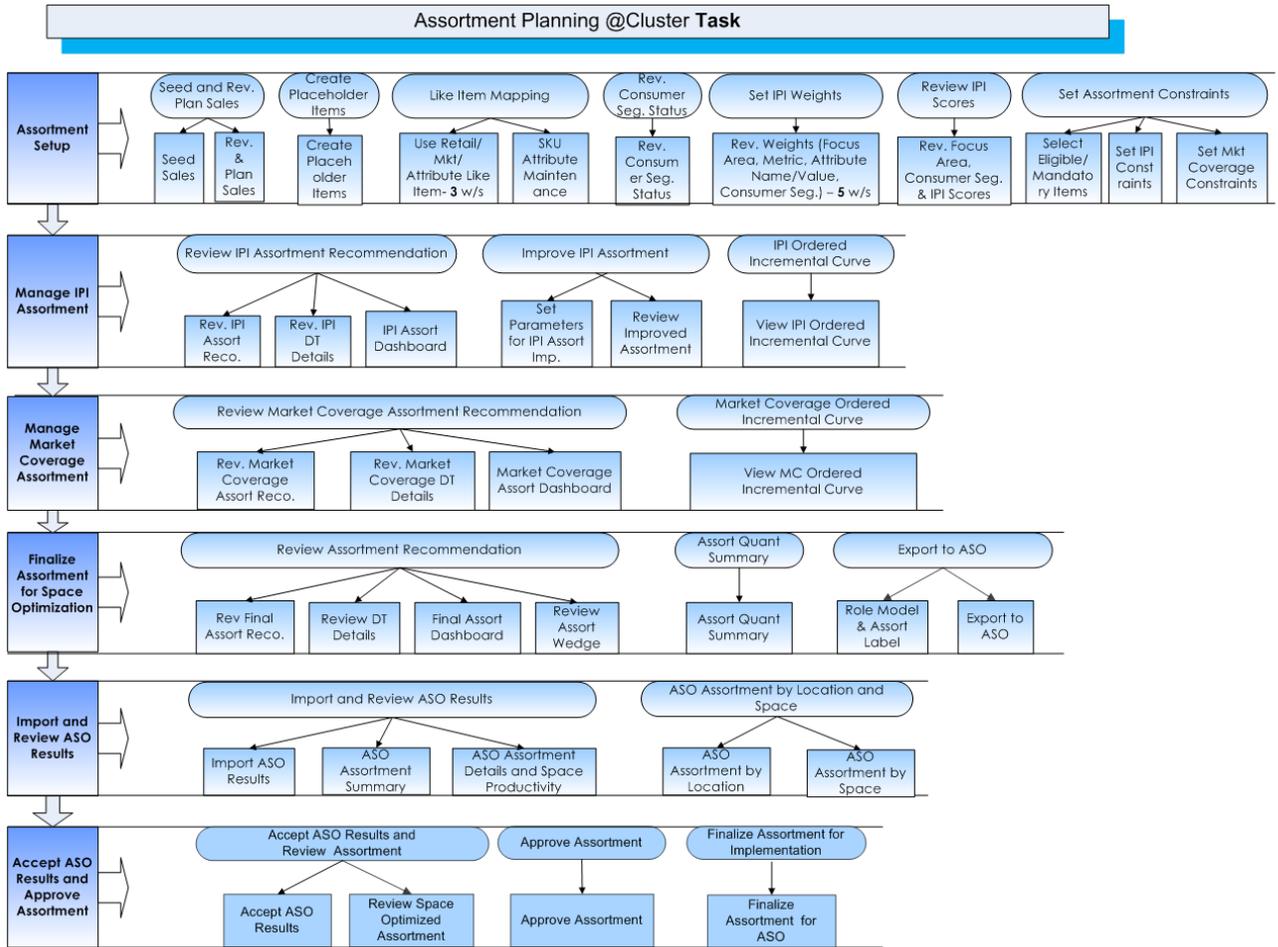
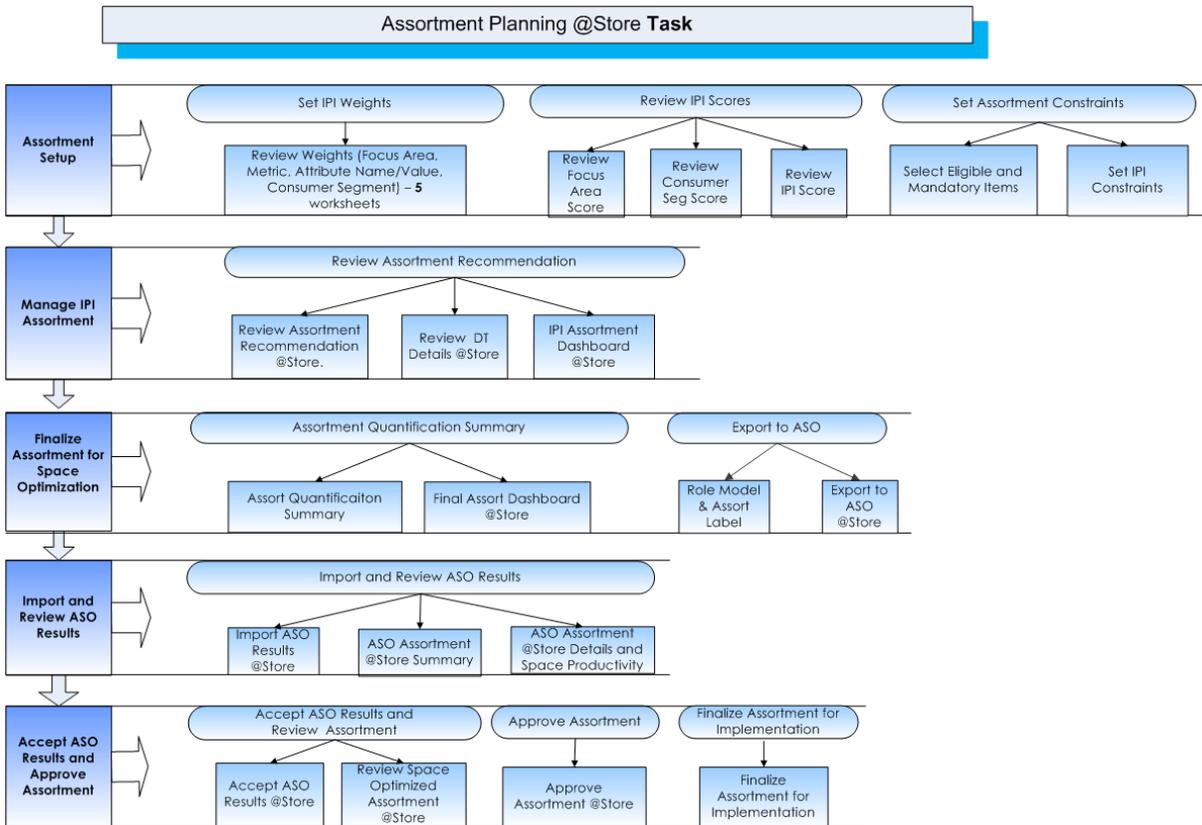


Figure 1-6 illustrates the task flow for the Assortment Planning @ Store task. Store level assortment plans can be created using the IPI-based assortment generation method and space optimized assortments derived under this task.

**Figure 1–6 Assortment Planning @ Store Task Flow**

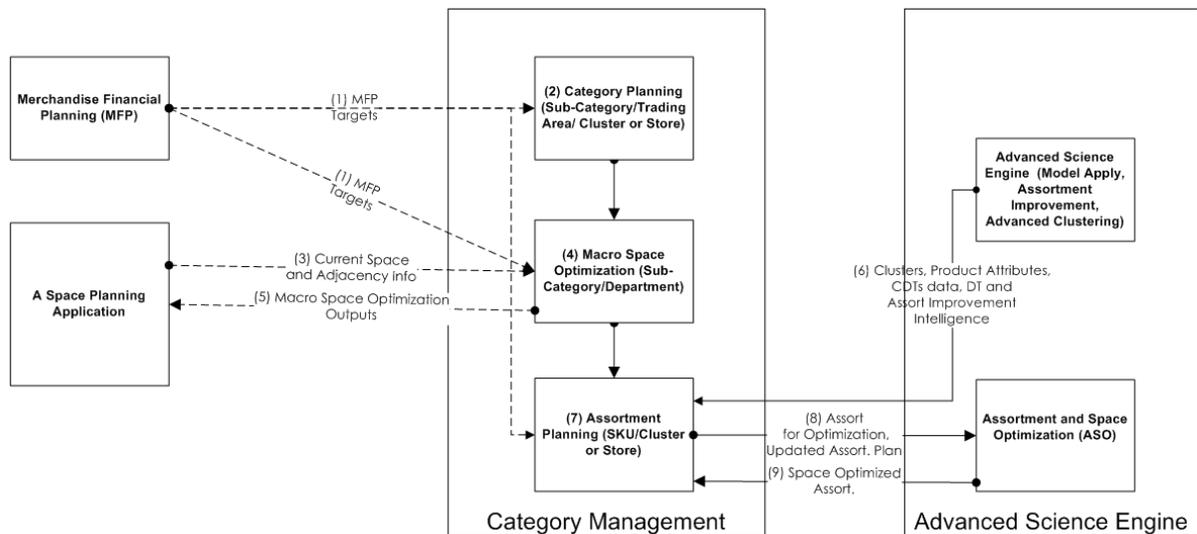


## Category Management Process Flow

Figure 1–7 depicts the overall process flow in Category Management and data exchange with other applications. Broadly the process flow consists of the following steps:

1. Import MFP Targets in the Category Planning and Assortment Planning modules.
2. Create and approve Category Plans and share them with Macro Space Optimization and Assortment Planning.
3. Import current space and adjacency information from a space management system.
4. Perform Macro Space Optimization.
5. Share the Macro Space Optimization output with a space management system and Assortment Planning.
6. Import clusters, product attributes, CDTs, Demand Transference (DT), and Assortment Improvement intelligence from ORASE.
7. Create Assortment Plans.
8. Export Assortment Plans to Assortment and Space Optimization.
9. Import space optimized assortments from Assortment and Space Optimization. Review, accept, approve, and finalize the assortment plans.

Figure 1–7 Category Management Process Flow



Space profit tables form the basis of MSO and are maintained by an administrator. These tables are used to store a relationship between allocated space and the respective gross profit returns at the retailer based on historic data. Space profit tables are also referred to as space profit elasticity curves, which are derived using Advanced Science algorithms.

Macro Space Optimization can be conducted at the store level, cluster level, or trading area level. It uses an algorithm, which runs at the store level, to recommend optimum space to a department and sub-category. At the cluster and trading area levels, the recommendations are presented by aggregating data from the store level.

## Advanced Science in Category Management

This section covers RCM's integration with Oracle Retail Advanced Science Engine (ORASE). RCM is integrated with the ORASE and sources key information, which is used in the Category Management process flow. ORASE is also referred to as Advanced Science or Science.

ORASE is the umbrella name for all the Advanced Science solutions. In Category Management, it is used for the following functionality:

- Used to generate assortment clusters, CDTs, and DT science parameters. The Advanced Clustering solution is used to generate assortment clusters.
- Used for assortment space optimization.

ORASE, through its specialized set of applications, derives key insights data by deep data mining rich historic business data. Imports from ORASE provide powerful insights about the retail business, bring efficiencies into the assortment planning process, and facilitate quick and effective decision making. In effect, RCM's integration with ORASE sets the stage for advanced science-based category management practice.

Key integration points with ORASE include the following:

- **Import of Assortment Cluster Data:** Stores are grouped into assortment clusters or store clusters to be used to create Assortment Plans at the cluster level. A prerequisite for RCM to source assortment clusters from ORASE is that both the applications must be sharing a common location hierarchy, that is, in terms of

stores to trading areas mapping. ORASE provides retailers with a flexible, user-friendly clustering solution utilizing advanced clustering methodology, where clusters can be generated based on various parameters such as seasonality, consumer segment profiles, store attributes, performance attributes, and product attributes. Other than ORASE, assortment clusters can also be sourced from the retailer's legacy system or any other external application.

- **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 ORASE which in turn sources this information from Oracle Retail Analytics (RA). RA extracts this information from RMS through Oracle Retail Extract, Transform, and Load (RETL) procedures. This import is a prerequisite for importing CDTs from ORASE as CDTs are based on product attributes. RCM and ORASE need to be in synch in terms of product attributes. 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, such as RMS and RA, and eventually to ORASE. This is to keep both the applications in synch in terms of product attributes.
- **Import of Consumer Decision Trees:** CDTs are used to understand the consumer buying process and identify key product attributes that influence consumer buying decisions from a consumer segment profile perspective. CDTs can be leveraged within the Assortment Planning process as an alternate product/merchandise hierarchy to analyze the assortment to ensure the presence of key items for target consumer segments in the planned assortment, reduce product attributes duplication beyond the required number of options in the assortment, and avoid dropping of unique items that can result in lost customers.  
  
CDTs are generated in ORASE by utilizing customer purchase history data and doing deep data mining using advanced science methods. Customer purchase history can be internally sourced from Point-of-Sale (POS) or loyalty solutions and externally from home-scan data providers. CDTs can also be fed to RCM directly from a legacy system or application at the retailer. These CDTs could come from third-party sources such as vendors or providers of syndicated market data.
- **Import of Demand Transference Data:** Demand Transference is used within the assortment planning process to understand the shift in sales between items within an assortment with changes to the assortment. This enables the assortment planner to assess both the assortment as a whole and evaluate the effectiveness of each item within the assortment. ORASE mines historic customer purchase data and generates Demand Transference parameters that are leveraged interactively, through an Application Programming Interface (API), in the Assortment Planning and Optimization process.
- **Export to ASO:** Assortment and Space Optimization (ASO) is a specialized application of ORASE. RCM exports assortment plan and category plan data to ASO with a space optimization request. ASO optimizes the assortment to the available space at the retailer and allots a suitable number of facings and linear feet, taking into consideration the planograms (POGs) used, demand transference, and supply chain factors. There are three types of exports available:
  - An export of assortment plan and category plan data to ASO with a space optimization request.
  - An export of an updated assortment plan for an existing space optimization request.

- An export to ASO with an update on assortment finalization for implementation.

For detailed information on these exports, see the *Oracle Retail Category Management Implementation Guide*.

## 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, Axiom, and FICO.

Some of this data is also sourced internally from other applications such as Point-of-Sale (POS), Loyalty Program 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. [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	<p>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 POS data with them.</p> <p>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.</p>
Household Panel Data	<p>Also referred to Home-scan data. Third-party syndicated data suppliers, or 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.</p>
Market Basket Data	<p>Market Basket refers to customer purchase data at the retailer. Customer purchases refer to market basket or the 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.</p> <p>Market Basket is a focus area in IPI calculations used to derive an Assortment Plan.</p> <p>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.</p>

**Table 1–1 (Cont.) Types of Data**

Data	Description
Customer and Market Loyalty Data	<p>Customer loyalty data represents loyalty metrics associated with consumers within a particular trading area towards specific retailers or a particular retailer.</p> <p>Market loyalty data is more product-focused loyalty information. 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.</p> <p>Customer and market loyalty data is supplied to retailers by syndicated data suppliers, such as Nielsen, Symphony IRI, NPD, and so on.</p>
Loyalty Card/Program Data	<p>Data captured through loyalty programs for a particular retailer. This is the retailer's internal data from its Customer Relationship Management (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.</p> <p>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.</p>

The data described in [Table 1–1](#) is required to leverage the full functionality of the RCM application which includes Category Planning and Assortment Planning and Optimization. It is possible to leverage the Category Management solution without all of the data, but access to some key and relevant pieces of functionality would be unavailable in the absence of such data. For example, without Market Syndicated data, you cannot perform a market focused analysis of categories and assortments. For more information, see the *Oracle Retail Category Management Implementation Guide*.

For the list of data requirements for CDT/DT, science, and ORASE, see the *Oracle Retail Advanced Science Engine Implementation Guide*.

## 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:

- Merchandise or Product hierarchies defined for each retail vertical such as grocery, hardliners, general merchandise, and so on
- Products fully defined for each product category
- Consumer and customer segments defined for each retail vertical
- Location hierarchy and trading areas clearly defined

Trading area is a new concept in Oracle Retail planning and optimization applications and is defined as (also commonly referred to as a market) a specific geographic area demarcated by a retail chain to conduct (view, plan, and manage) its business and compare it with the competitors' business. For the geographic area being demarcated to qualify as a trading area, it must be generating a threshold volume of business (sales) neither too large nor too small, but contributing to a significant chunk of the business in that region. The value of threshold volume of business is based on the

retailer's discretion, for example, Atlanta, Jacksonville, Greater Mumbai area, and so on.

Trading areas are also defined on the basis on traditional geographical boundaries such as a city or town, census survey reports, governmental directions, common understanding among different retailers and market research companies in the industry, and the retailer's own business requirements. Trading area definition may differ from retailer to retailer competing in the same region, state, country, and so on. There can also be a common agreement in the industry on the trading areas definition and division among retailers and third-party market research companies collecting and providing syndicated data to the retailers for everyone's benefit.

For example, the US market is conventionally divided into 52 trading areas by market research largely following state-level demarcations.

The preceding data requirements are met by importing the following:

- Store clusters  
In the generally available version of the solution, store clusters or assortment clusters are imported from ORASE.
- Product hierarchies
- Location hierarchies
- CDTs
- Product attribute names and attribute values  
In the generally available version of the solution, this product attributes information is imported from ORASE.
- Market scan data
- Retailer POS data
- Space-related data
- Retailer loyalty data
- Market basket data
- Demand Transference input parameters from ORASE

## Key Take Aways

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 view:

- The notes can be any important points the user wants to capture, such as additional information (quick insights such as supplier insights, competition insights, consumer insights, product insights, and so on) used in arriving at a decision highlighting the rationale or perhaps a point that led them to their final decision.
- Key take aways can be used for saving notes from findings derived from different analyses.
- Key take aways can be used by the owner of a step to provide notes to other users who have lower privileges.

## User Roles

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

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**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.

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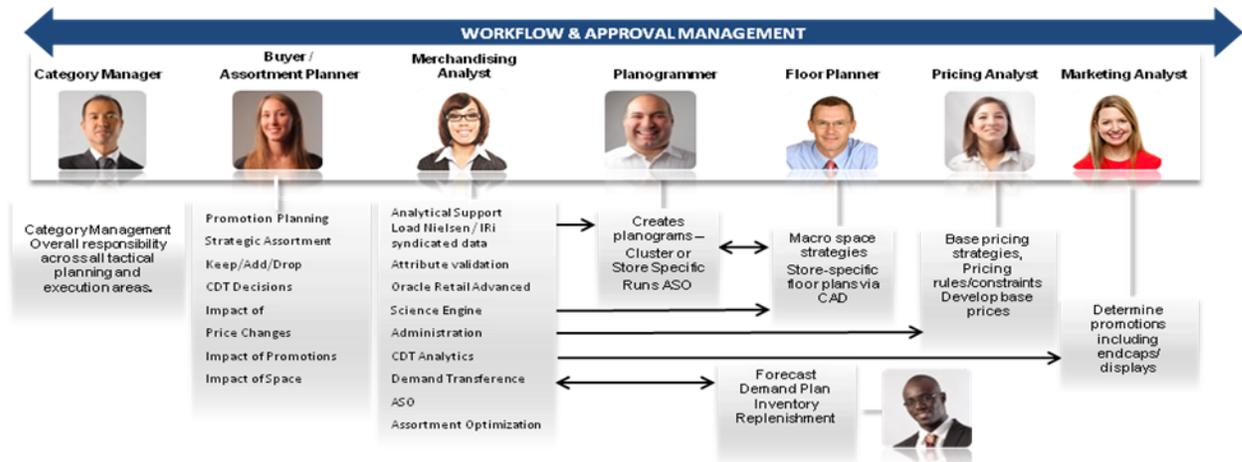
Table 1–2 shows an example list of roles and their functions and areas of responsibility:

**Table 1–2 Example of Roles**

<b>Role</b>	<b>Application</b>	<b>Description</b>
Category Manager	Category Planning	Analyzes category performance and compares with competition. Determines the Roles, Strategies, and Tactics. Responsible for meeting financial targets.
Buyer / Assortment Planner	Assortment Planning	Selects the optimal assortment for each store, taking into account sales performance, forecast, budget, and space constraints.
Merchandising Analyst	Category Planning and Assortment Planning	Analytical support for Nielsen/IRI syndicated data, product attributes validation, ORASE administration, CDT Analytics, Demand Transference, and Assortment Optimization.
Planogrammer	ORASE and POG Software	Ensures that the assortment can fit within the allocated space, and adds the art to the planogram.
Floor Planner	MSO, a space management system	Uses space targets to define department sizes.
Merchandise	MSO, a space management system	Uses category/sub-category space targets to determine what length of planograms to place.
Administrator	NA	Application installation, admin and support, data imports, and user ID creation.

Figure 1–8 presents various business roles involved in the end-to-end category management process. Note that not all the standard user roles defined in this figure are directly working on the RCM application.

**Figure 1–8 Business Roles Involved in Category Management Process**



## Plan and Measure Roles and Versions

The measures in the RCM GA are composed of a Role, Version, Metric, and Unit of Measure. Each component is designed to carry a particular piece of information that together indicates the purpose of the measure. [Table 1–3](#) lists a description of each component.

**Table 1–3 Description of Measure Components**

Component	Description
Role	The role describes an anticipated type of user that will be using the system. Workbooks are tailored to meet the needs of these different types of users, so it also generally indicates where the measure is expected to be found in RCM.
Version	The version tells at what stage in the planning process the measure's data represents. Examples of this are this year (TY) versus last year (LY), or working plan (WP) versus original plan (OP) or target (Tgt). It can also indicate that a measure is intended to be an intermediate measure.
Metric	This component describes the nature of the information in a measure. Typical examples are sales, profit, inventory turn, and so on.
Unit of Measure	The unit of measure represents the data format, integer, decimal number, date, text, and so on.

Some of the commonly used roles are listed in [Table 1–4](#).

**Table 1–4 Category Management Roles**

Role	Description	Notes
AC	Assortment Planning @ Cluster	Measures with this role are almost all found in the Assortment Planning @ Cluster workbook.
AD	Administrator	Measures with this role are mostly found in the administration workbook. They are occasionally found in other workbooks, and often are loaded with an initial set of default values.
CM	Category Planning	Measures with this role are usually found in the Category Planning workbook. Some CM measures are also shown in the Assortment Planning Analysis workbook for reference.

**Table 1–4 (Cont.) Category Management Roles**

<b>Role</b>	<b>Description</b>	<b>Notes</b>
DR	Default Role	This role usually indicates that the measure is for raw, loaded data. This data is usually processed somehow before appearing in any other workbook. It also is used for utility purposes, for example, for the role for a measure whose only purpose is to provide white-space on a view.
CE	CDT Editor	This role indicates that the measure is associated with the CDT Editor workbook. There are relatively few of these.
AS	Assortment Planning @ Store	Measures with this role are found in the Assortment Planning @ Store workbook.
MD	Macro Space Optimization @Dept	Measures with this role are found at the Macro Space Optimization at Department level.
MS	Macro Space Optimization @Sub-Category	Measures with this role are found in at Macro Space Optimization at Sub-Category level.
SO	Assortment Space Optimization	This role is used for Assortment Space and Optimization (ASO) interface database measures stored in the Data Mart in the RPAS Hybrid Storage Architecture.

Some of the commonly used versions are listed in [Table 1–5](#).

**Table 1–5 Category Management Versions**

<b>Version</b>	<b>Description</b>	<b>Notes</b>
CP	Current Plan	These measures contain the most recently approved assortment plan values.
LP	Last Plan	These measures contain a copy of the CP measures, time-shifted into the future by one period. It is used to give users another data set against which to compare the WP information.
OP	Original Plan	This denotes information approved in the Category Planning workbook used as target information for the Assortment Planning workbooks.
WP	Working Plan	These measures contain data that users are currently working on.
LY	Last Year	Time-shifted data used to compare the current plan with last year's values for the same period.
TY	This Year	Usually applied to loaded historical data, and rarely shown in workbooks.
Fc	Forecast	Only used for measures that store the results of a forecast.
DV	Default Value	Data for which there is not yet a defined version in the system. Often used with the default role (DR) to indicate base loaded data.
DB	Database	Usually, measures that are part of an intermediate step in a calculation.
DC	Scalar	Usually, measures that store a global value, such as labels.
LU	Lookup	Usually, measures that are part of an intermediate step in a calculation.
Mf	Merchandise Financial Planning Targets	Version used for MFP interface measures.

**Table 1–5 (Cont.) Category Management Versions**

Version	Description	Notes
AI	Assortment Improvement	Version used for Assortment Improvement versions of all metrics.
AO	ASO	Version used to store level ASO results of all metrics.

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**Note:** The version Tg (Target) is not included and will be removed in a future release. It has been replaced with OP (Original Plan).

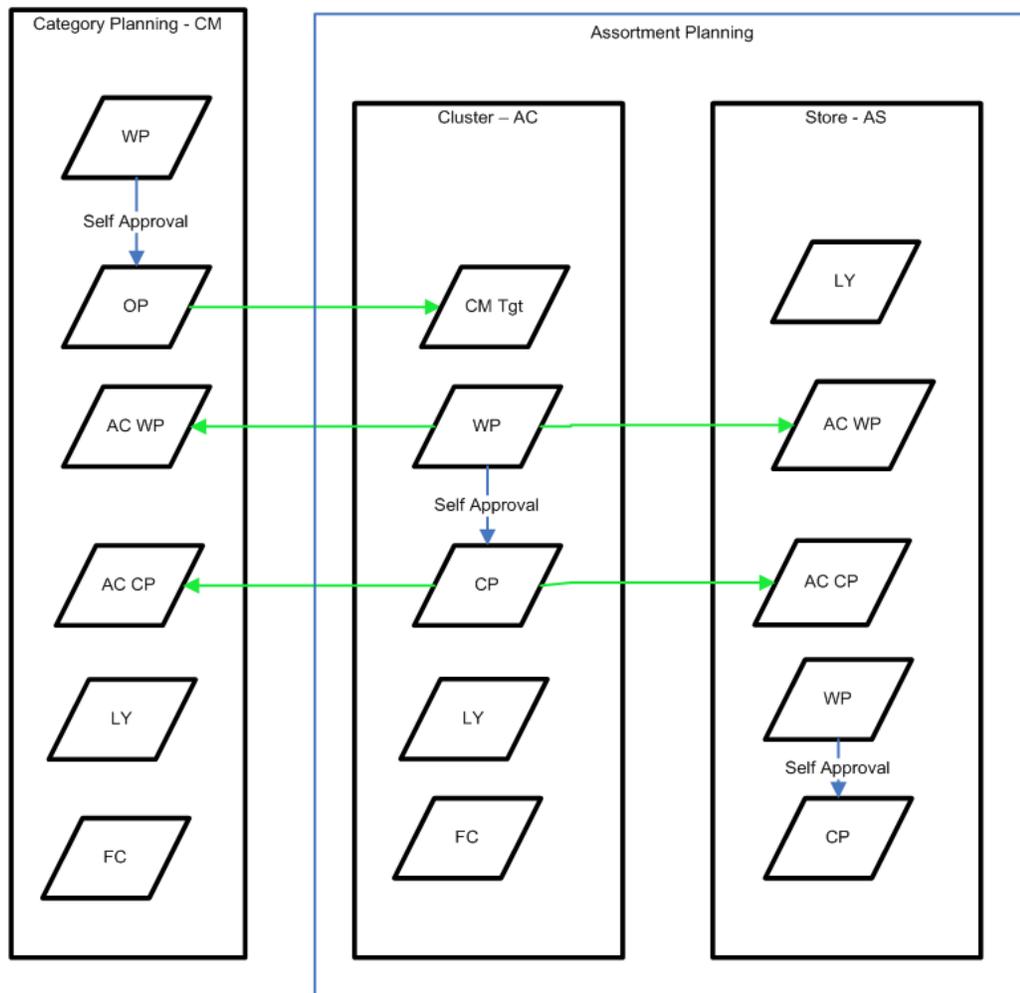
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Combined measures are widely used in presenting space optimized assortments in assortment planning aggregate plan values for different measures in assortment planning, by taking into account both cluster level and store level measure values. If, store level measure values are populated for a store location, then cluster level measure values for that measure are not considered, otherwise, cluster level measure values are used to calculate the combined measure value from that location.

Private label measures are available in assortment planning. Private label measure values are derived using the attribute value maintenance for a SKU. If a private label attribute is maintained for an item, the private label measures values are populated with the corresponding plan data. If the private label measures are directly entered or planned, they are automatically copied to the working plan measures.

The combined roles and versions of measures indicate how data flows through the system. This is referred to as version flow and is an important part of understanding how Category Management is structured.

Figure 1–9 shows how data flows through the RCM application.

**Figure 1-9 Category Management Version Flow**

The Category Planning workbook has WP (Working Plan), LY (Last Year), FC (Forecast), and OP (Original Plan) versions of measure. When a category plan is approved, the current WP measure data is copied to OP versions of the measures. This OP version is shared to Assortment Planning. This is accomplished by again copying the data from a CMOP role/version of the measure to a corresponding ACWP role/version. In [Figure 1-9](#), the Tgt version is called OP in the application.

The Assortment Planning workbook has WP, LY, FC, and CP versions of measure. WP is approved to CP, and this CP version is shared to Category Planning and Assortment Planning @ Store. CM is architected so that Assortment Planning @ Cluster and Assortment Planning @ Store are a single workbook. This was done so that the sharing of version data between the two is real time, as opposed to the sharing of data to Category Planning, which requires building and refreshing of the workbooks between the two.

Assortment Planning @ Cluster and Assortment Planning @ Store share the same base sales metric (that is, ACWPSlsR and ACWPSlsU at Week/SKU/Store). The only replan you are doing at Assortment Planning @ Store is the assignment of override Core/Optional flags which will update the final Assort Sales metric at Store versus Cluster.

Finally, the Assortment Planning information AC WP and AC CP (Assortment Planning @ Cluster role) is also viewable in the Category Planning workbook. The

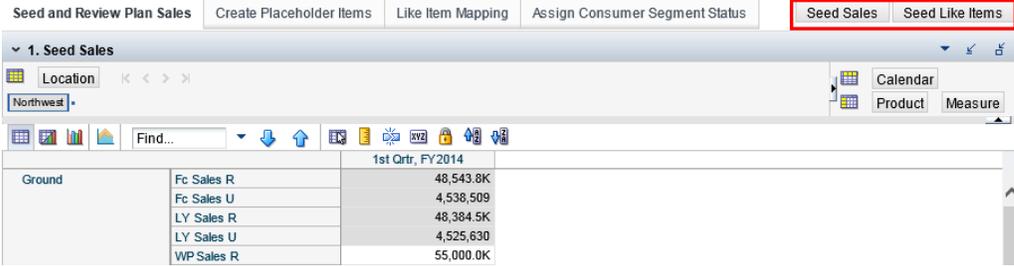
reason AS WP and AS CP (Assortment Planning @ Store role) is not shown is that the cluster and store information is presented in measures called WP AS Combined Assort Sales and CP AS Combined Assort Sales. These measures combine both AC and AS values into AC WP/CP into measures shared to Category Planning. This is done in Assortment Planning as a normal calc rule group.

## 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 views under the steps available in different tasks. For example, the Seed Sales custom menu option, shown in [Figure 1–10](#), is applicable to the Seed Sales and Review Sales views in the Set Targets and Approve Category Plan step under the Category Planning task. The WP Seed Sales flag needs to be checked in the Seed Sales view before running the custom menu option. The results of the custom menu option run then appear in the Review Sales view.

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 application. [Figure 1–10](#) shows an example of a custom menu option.

**Figure 1–10 Example of Custom Menu Options**



		1st Qtr, FY 2014
Ground	Fc Sales R	48,543.8K
	Fc Sales U	4,538,509
	LY Sales R	48,384.5K
	LY Sales U	4,525,630
	WP Sales R	55,000.0K

The Seed and Review Plan Sales and Like Item Mapping tabs (under the Assortment Planning @ Cluster task and Assortment Setup step) have two custom menu options available. Seed Sales and Seed Like Items are available for seeding sales to the new plan and seeding like item sales to new items respectively. The view is that of Seed Sales, which presents different versions of the plan including WP (Working Plan) along with LY (Last Year), and Fc (Forecast) plan measures.

## Copy View Option

This option enables you to create custom views, by selecting and formatting the measures as required, and saving the custom views in the workflow.

The copy view option can be utilized by right clicking on any of the view labels at the bottom to create a copy of the existing view. The copied view can then be customized as needed. This option is useful in creating custom views per individual requirements.

## 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*.



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## CDT Editor Task

Consumer Decision Trees (CDTs) are used to understand the consumer buying process and to identify key product attributes that influence consumer buying decisions from a consumer segment perspective. The usage of CDTs as an alternate hierarchy in Assortment Planning process ensures that key product attribute-based products are present in the assortment.

CDTs, with their dynamic hierarchical structure, help retailers gain insight into the consumer buying process, providing a visual representation (tree-like structure) of the relative importance of product attributes to a consumer segment in a product category. CDTs are used to rationalize and align assortments towards target consumer segments. RCM sources CDTs from ORASE. CDTs can be sourced from external parties such as manufacturers and market research companies providing syndicated data such as IRI, Nielsen, and so on.

Two techniques are applied in tandem to derive a CDT:

- **Market Structure:** A method to identify the product attributes which influence a customer's buying decision. These product attributes define the competitive relationship between the products under a sub-category.
- **Preference Segmentation:** Identifies and divides the market into unique customer segments based on the similar buying patterns.

The CDT structure provides attribute ranking, which measures the importance of each attribute to the consumer relative to the other attributes within the category. 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 market structure of a category (the relationship between products) can be thought of as a road map that consumers use to find their way through the maze of products and product segments to arrive at a purchase decision.

The decision process can vary for each consumer segment for the same category. Assortment planners can use CDTs for different consumer segments to shape the assortment towards target consumer segments per their relative importance to the retailer.

The following capabilities are supported:

- Viewing the assortment by CDT.
- Viewing and comparing different CDTs.
- 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:

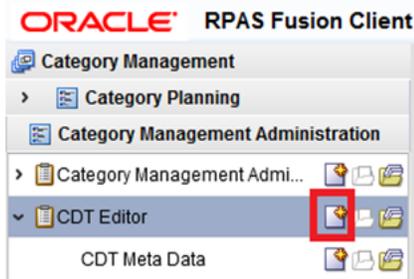
- [CDT Meta Data Step](#)

## Create the CDT Editor Workbook

To create the workbook:

1. Navigate to the **Category Management Administration** Activity.
2. Select the **New Workbook** icon in the CDT Editor task.

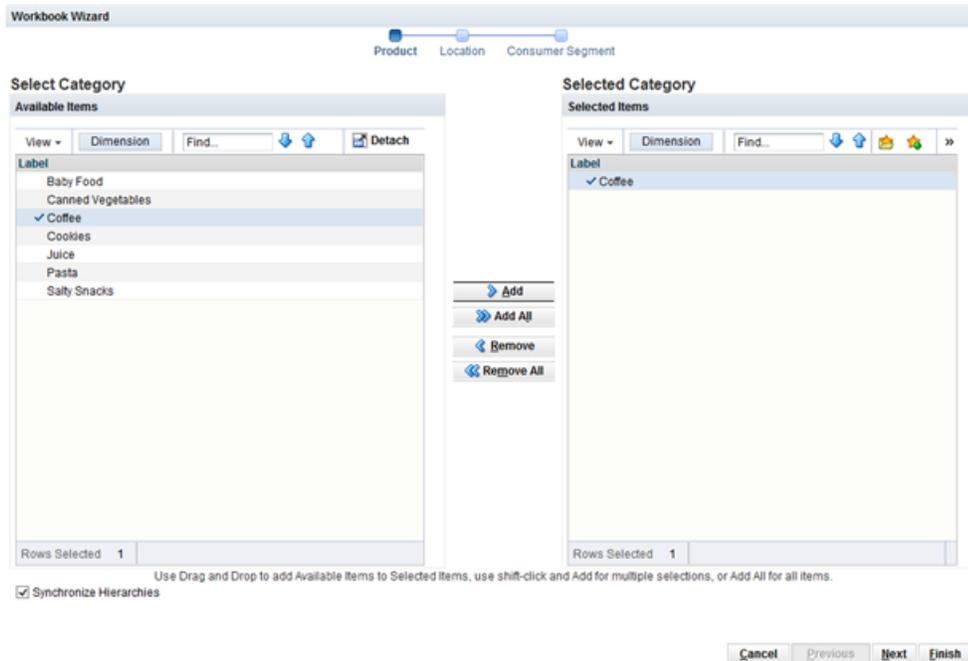
Figure 2–1 CDT Editor Task



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**

Workbook Wizard

Product Location Consumer Segment

**Select Trading Area**

Available Items

View - Dimension Find... [Up] [Down] [Detach]

Label

- e-commerce USA
- Northeast
- ✓ Northwest
- Southeast
- Southwest

Rows Selected 1

Selected Trading Area

Selected Items

View - Dimension Find... [Up] [Down] [Add] [Remove] [Star] [Star] [Right Arrow]

Label

- ✓ Northwest

Rows Selected 1

Use Drag and Drop to add Available Items to Selected Items, use shift-click and Add for multiple selections, or Add All for all items.

Synchronize Hierarchies

Cancel Previous Next Finish

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

**Figure 2–4 Workbook Wizard Select Consumer Segment Page**

Workbook Wizard

Product Location Consumer Segment

**Select Consumer Segment**

Available Items

View - Dimension Find... [Up] [Down] [Detach]

Label

- Ethnic Interests
- Gourmet Shoppers
- Live Large
- Natural N Healthy
- Simply Seniors
- ✓ Soccer Moms
- ✓ Value Seekers

Rows Selected 2

Selected Consumer Segment

Selected Items

View - Dimension Find... [Up] [Down] [Add] [Remove] [Star] [Star] [Right Arrow]

Label

- ✓ Soccer Moms
- ✓ Value Seekers

Rows Selected 2

Use Drag and Drop to add Available Items to Selected Items, use shift-click and Add for multiple selections, or Add All for all items.

Synchronize Hierarchies

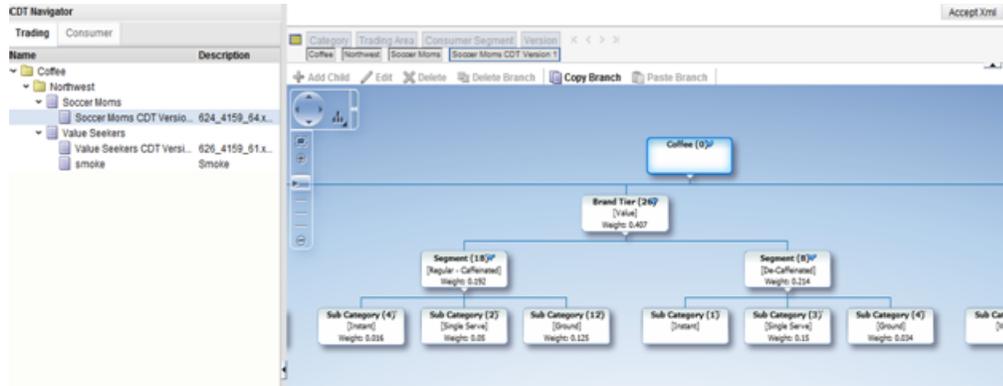
Cancel Previous Next Finish

The workbook is created.

## CDT Meta Data Step

This step has one view. Use this view to review and make changes to the CDT. After all CDT edits are made, commit the workbook.

**Figure 2–5 CDT Meta Data View**



## Custom Menu Option

The CDT Editor workbook has a custom menu option 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 application. The custom menu option processes all new and modified CDTs. This processing sets up the dynamic hierarchies that are available in Assortment Planning Analysis, Assortment Planning @Cluster, and Assortment Planning @Store tasks.

After the Accept XML custom menu option has been run, the CDT needs to be enabled in the domain. For more information, see ["Select CDT Version View"](#) in [Chapter 3](#).

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## 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*.

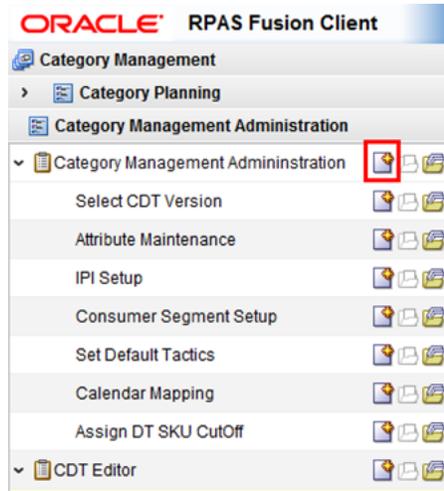
This task has the following steps:

- [CDT Maintenance Step](#)
- [Attribute Maintenance Step](#)
- [IPI Setup Step](#)
- [Consumer Segment Step](#)
- [Set Default Tactics Step](#)
- [Calendar Mapping Step](#)
- [Assign DT SKU Cutoff Step](#)
- [Manage MSO Tables Step](#)
- [Like Sub-Category Mapping Step](#)
- [POG and PROD Hierarchy Mapping Step](#)
- [Placeholder and Formalized Items Step](#)

### Create the Category Management Administration Workbook

To create the workbook:

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

**Figure 3–1 Category Management Administration Task**

The workbook is created.

## CDT Maintenance Step

This step has two views:

- [Delete CDTs View](#)
- [Select CDT Version View](#)

### Delete CDTs View

Use this view to delete CDTs. There are five slots available for each consumer segment to upload five versions of CDTs. This view facilitates the maintenance of appropriate CDTs for a consumer segment. It provides a feature to delete a CDT version to free up available slots. This in effect, facilitates maintaining appropriate CDTs in the application per the business requirements.

Check the Boolean flag measure for the CDT versions that need to be deleted in the worksheet, commit the workbook, and run the batch script `$CM_HOME/bin/deleteCdt.ksh` in the back-end. All CDTs marked for deletion will be purged by the script by:

- CDT measure deleted.
- Dynamic Hierarchy Dimension measures for name and label for all levels of the CDT are deleted for the consumer segment, trading area, and category. This makes sure that the deleted CDTs are not visible in the application in the Assortment Planning tasks.
- CDT Editor will not show the CDT in the menu.

**Figure 3–2 Delete CDTs View**

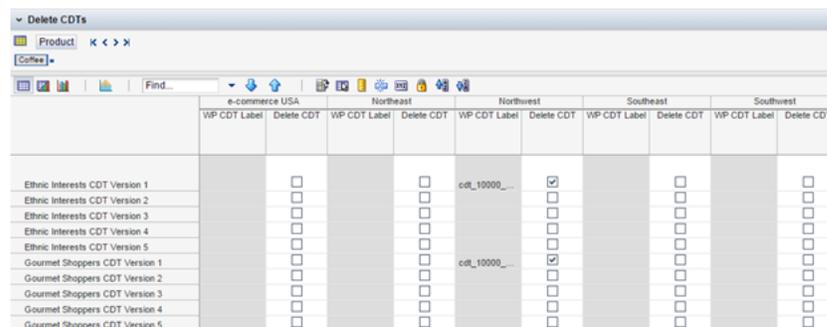


Table 3–1 lists the measures available in this view.

**Table 3–1 Delete CDTs Measure**

Label	Definition
WP CDT Label	The Consumer Decision Tree's label, or name description, being used in the working plan assortment.
Delete CDT	A Boolean flag measure which needs to be checked to delete a CDT version before running the following batch script: \$CM_HOME/bin/deleteCdt.s.ksh

### Select CDT Version 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. This action defines the pre-range mapping of CDTs, which governs their availability at the time of Assortment Planning workbook creation.

**Figure 3–3 Select CDT Version View**

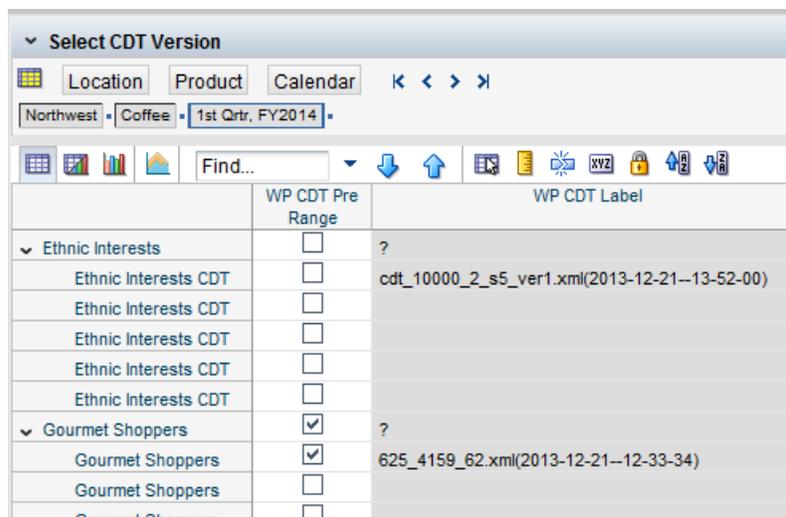


Table 3–2 lists the measures available in this view.

**Table 3–2 Select CDT Version Measure**

Label	Definition
WP CDT Pre Range	Administrator Working Plan CDT Pre Range Boolean.
WP CDT Label	The Consumer Decision Tree's label, or name description, being used in the working plan assortment.

## Attribute Maintenance Step

This step has three views:

- [Attribute Value Maintenance View](#)
- [Category Attribute Mapping View](#)
- [SKU Attribute Maintenance View](#)

### Attribute Value Maintenance View

Product Attributes in RCM are stored in the form of Attribute Names and Attribute Values. Attribute Values are a list of product attributes for a specific Attribute Name. Examples of Attribute Names are Brand, Brand Tier, Size, Flavor, and so on. The following is an example of Attribute Values:

- The Attribute Name is Flavor and the product category in consideration is Fruit Juices.
- The corresponding Attribute Values are Apple, Orange, Grape, Mixed Fruit, and so on.

Right-click on an Attribute Value position and use the Attribute Value Maintenance view to maintain product attribute values (attribute value) mapping to product attribute names (attribute name). Product Attributes, in general, refer to both Attribute Names and Attribute Values.

The ground rule here is that the name and label of the attribute value should be similar. Except for underscore (\_), the Attribute Value Name cannot use any other special characters, unlike the Attribute Value Label. The user should ensure that the naming method (nomenclature) of the attribute value name and attribute value label is similar. For example, if the Attribute Name equals Brand and Attribute Value Label equals Dunkin' Donuts, the Attribute Value Name should be Dunkin\_Donuts.

**Figure 3–4 Attribute Value Maintenance View**

		Attribute Value
▼ Brand	Caribou Coffee	Caribou Coffee
	Donut House	Donut House
	Dunkin' Donuts	Dunkin' Donuts
	Eight O'Clock	Eight O'Clock
	Folgers	Folgers
	Gevalia	Gevalia
	Maxwell House	Maxwell House
	Nescafe	Nescafe
	Newman's Own	Newman's Own
	Peet's	Peet's
	PL	PL
	Seattles Best	Seattles Best
	Starbucks	Starbucks
	Tully's	Tully's
Yuban	Yuban	
▼ Brand Tier	Mainstream	Mainstream
	Premium	Premium
	Value	Value
▼ Format Size	12 CT	12 CT
	12 oz	12 oz

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

**Table 3–3 Attribute Value Maintenance Measure**

Label	Definition
Attribute Value	Indicates whether 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. Depending on the settings done here, different attribute names and their respective attribute values are made available to different product categories for placeholder item creation and attribute values' modification. For example, an Attribute Name equal to Flavor may apply for the Juices product category, but may not apply for the Kitchen Utensils product category.

**Figure 3–5 Category Attribute Mapping View**

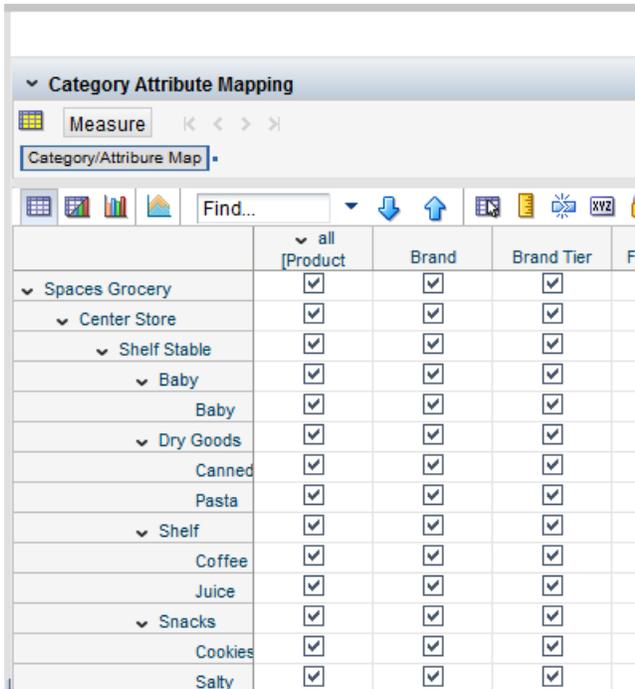


Table 3–4 lists the measure available in this view.

**Table 3–4 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 the Attribute Values mapping to a SKU or item. This view provides the facility to modify attribute value mappings for a SKU, if required. A Master Data Management (MDM) system, such as RMS, has the system of record for product/SKU attributes information. Any changes done to attribute values of a SKU here need to be communicated to RMS.

**Figure 3–6 SKU Attribute Maintenance View**

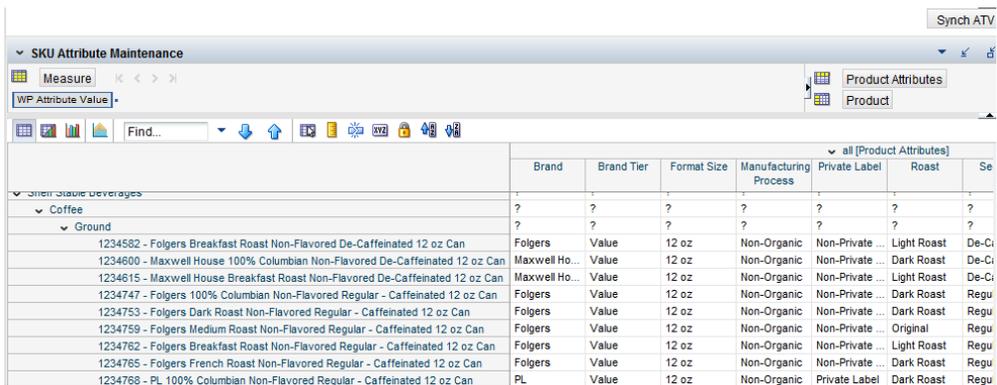


Table 3–5 lists the measure available in this view.

**Table 3–5 SKU Attribute Maintenance Measure**

Label	Definition
WP Attribute Value	The attribute value mapped to an attribute name defining a product feature or attribute as part of a working plan assortment. Attribute Values map to Attribute Names and Attribute Names map to the product. For example, the Attribute Name equals Brand, Flavor, Size, and so on. The Attribute Values for Flavor equal Apple, Orange, Grape, Mixed Fruit, and so on.

Committing the workbook allows the attribute changes made in this workbook to appear across different views in the rest of the application.

## 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 Assortment Planner to achieve category-specific objectives. These weights are pre-populated to match a retailer's specific assortment requirements. Weights used in IPI calculations are directly determined by the strategy assignment to a sub-category/category. Roles, strategies, and tactics assignments in Category Planning to categories and sub-categories determine the assignment of IPI weights. Weights can be set at the consumer segment, cluster, and sub-category level in the Assortment Planning @ Cluster task to generate customized IPI assortments.

This step contains five views:

1. [Assign Focus Area Weights View](#)
2. [Assign Metric Weights View](#)
3. [Assign Attribute Name Weights View](#)
4. [Assign Attribute Value Weights View](#)
5. [Assign Consumer Segment Weights View](#)

### 1. Assign Focus Area Weights View

Focus areas represent the different perspectives of looking at a business to analyze, understand, evaluate, and manage it. Examples of focus areas include Attributes or Product attributes-focused analysis, Loyalty Analysis, Market Basket Analysis, Performance Analysis, and so on. Focus areas are used as levers to generate an assortment with required importance given to different perspectives of looking at a business. 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% to keep the IPI scores within a narrow range of values.

**Figure 3–7 1. Assign Focus Area Weights View**

		Attributes	Loyalty	Market Basket	Performance
▼ Shelf Stable Grocery	▼ all [Consumer Segment]	0.0 %	0.0 %	0.0 %	100.0 %
	Ethnic Interests	0.0 %	0.0 %	0.0 %	100.0 %
	Gourmet Shoppers	0.0 %	0.0 %	0.0 %	100.0 %
	Livin Large	0.0 %	0.0 %	0.0 %	100.0 %
	Natural N Healthy	0.0 %	0.0 %	0.0 %	100.0 %
	Simply Seniors	0.0 %	0.0 %	0.0 %	100.0 %
	Soccer Moms	0.0 %	0.0 %	0.0 %	100.0 %
	Value Seekers	0.0 %	0.0 %	0.0 %	100.0 %
▼ Baby Needs	▼ all [Consumer Segment]	0.0 %	0.0 %	0.0 %	100.0 %
	Ethnic Interests	0.0 %	0.0 %	0.0 %	100.0 %
	Gourmet Shoppers	0.0 %	0.0 %	0.0 %	100.0 %
	Livin Large	0.0 %	0.0 %	0.0 %	100.0 %
	Natural N Healthy	0.0 %	0.0 %	0.0 %	100.0 %
	Simply Seniors	0.0 %	0.0 %	0.0 %	100.0 %
	Soccer Moms	0.0 %	0.0 %	0.0 %	100.0 %
	Value Seekers	0.0 %	0.0 %	0.0 %	100.0 %

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

**Table 3–6 1. Assign Focus Area Weights Measure**

Label	Definition
Focus Area Weight	The user-defined percentage weight for the focus area used in generating a system-recommended IPI assortment.

## 2. Assign Metric Weights View

Metrics are used to define a focus area. Weights are assigned to different metrics according to the relative importance or emphasis that needs to be given to them. 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% to keep the IPI scores within a narrow range of values.

**Figure 3–8 2. Assign Metric Weights View**

		Sales R Weight	Sales U Weight	Gross Profit Weight	Gross Profit % Weight	Loyalty Weight	Market Basket Weight
all [Consumer Segment]   Ethnic Interests   Cash Generating							
Find...							
Coffee	Performance	100.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
	Attributes	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
	Loyalty	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
	Market Basket	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Ground	Performance	100.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
	Attributes	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
	Loyalty	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
	Market Basket	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Instant	Performance	100.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
	Attributes	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
	Loyalty	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
	Market Basket	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Single Serve	Performance	100.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
	Attributes	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
	Loyalty	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
	Market Basket	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Whole	Performance	100.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
	Attributes	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
	Loyalty	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
	Market Basket	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %

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

**Table 3–7 2. 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	The percentage weight assigned to the gross profit retail metric for individual focus areas in the IPI calculation for any category.
Gross Profit % Weight	The percentage of weight given to the gross profit retail metric for individual focus areas in the IPI calculation for any category.
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.
Market Basket Weight	The user-defined percentage weight assigned to the Market Basket focus area in IPI calculations and IPI assortment generation. It is used to emphasize the presence of an item in the market basket, or consumer's basket, in generating a system-recommended IPI assortment.

### 3. Assign Attribute Name Weights View

Attribute Name Weights need to be defined when the assortment needs to have a specific product attributes mix. This provides a very useful way to derive an assortment.

Use the Assign Attribute Name Weights view to set numeric weights that can be used to assign positive rational number ratios between different Attribute Names per the assortment-mix requirements. These weights directly influence the assortment mix on the basis of the relative weights emphasis to different attribute names. For example, if Attribute Name Weights are defined using high value rational numbers, the IPI scores

generated by the system will have high value numbers. Similarly, if the Attribute Name Weights are assigned lower rational number values, the IPI scores will have a lower range of values.

---

**Note:** Attribute Name weights, being numeric weights, can inflate the IPI scores if a high numeric value is set. The user should be cautious in assigning weights to them.

---

**Figure 3–9 3. Assign Attribute Name Weights View**

		all [Consumer Segment]	Ethnic Interests	Gourmet Shoppers	Live Large	Natural N Healthy	Simply Seniors	Soccer Moms	Value Seekers
▼ Shelf Stable Grocery	Brand	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Brand Tier	0.06	0.00	0.06	0.06	0.00	0.06	0.06	0.06
	Format Size	0.15	0.00	0.15	0.15	0.00	0.15	0.15	0.15
	Manufacturing Process	0.04	0.00	0.04	0.04	0.00	0.04	0.04	0.04
	Private Label	0.18	0.00	0.18	0.18	0.00	0.18	0.18	0.18
	Roast	0.06	0.00	0.06	0.06	0.00	0.06	0.06	0.06
	Segment	0.11	0.00	0.11	0.11	0.00	0.11	0.11	0.11
	Sub Category	0.13	0.00	0.13	0.13	0.00	0.13	0.13	0.13
	Sub Segment	0.13	0.00	0.13	0.13	0.00	0.13	0.13	0.13
	Trade Type	0.14	0.00	0.14	0.14	0.00	0.14	0.14	0.14

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

**Table 3–8 3. Assign Attribute Name Weights Measure**

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

### 4. Assign Attribute Value Weights View

Use the Assign Attribute Value Weights view to set the numeric 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.

---

**Note:** Attribute Value weights, being numeric weights, can inflate the IPI scores if a high numeric value is set. The user should be cautious in assigning weights to them.

---

**Figure 3–10 4. Assign Attribute Value Weights View**

		all [Consumer Segment]	Ethnic Interests	Gourmet Shoppers	Livin Large	Natural N Healthy	Simply Seniors	Soccer Moms	Value Seekers
Shelf Stable Grocery	Brand	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
	Caribou Coffee	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
	Donut House	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
	Dunkin' Donuts	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
	Eight O'Clock	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
	Folgers	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
	Gevalia	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
	Maxwell House	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
	Nescafe	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
	Newman's Own	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
	Peet's	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
	PL	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
	Seattle's Best	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
	Starbucks	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
	Tully's	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
	Yuban	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
	Brand Tier	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
	Mainstream	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
	Premium	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
	Value	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00

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

**Table 3–9 4. Assign Attribute Value Weight Measure**

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

## 5. 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 directly used in IPI score calculations and can be used to shape the assortment towards target consumer segments. These weights should add up to 100% to keep the IPI scores within a narrow range of values.

**Figure 3–11 5. Assign Consumer Segment Weights View**

		Consumer Seg Weight
Coffee	Simply Seniors	0.0 %
	Soccer Moms	40.0 %
	Value Seekers	30.0 %
	Ethnic Interests	0.0 %
	Gourmet Shoppers	30.0 %
	Livin Large	0.0 %
	Natural N Healthy	0.0 %
	Simply Seniors	0.0 %
	Soccer Moms	40.0 %
	Value Seekers	30.0 %

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

**Table 3–10 5. Assign Consumer Segment Weights Measure**

Label	Definition
Consumer Seg Weight	The Administrator default value for the Consumer Segment 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 a Consumer Segment Distribution.

**Figure 3–12 Assign Consumer Segment Distribution View**

		Consumer Seg Distribution
Shelf Stable Grocery	all [Consumer Segment]	100.0 %
	Ethnic Interests	0.0 %
	Gourmet Shoppers	30.0 %
	Livin Large	0.0 %
	Natural N Healthy	0.0 %
	Simply Seniors	0.0 %
	Soccer Moms	40.0 %
	Value Seekers	30.0 %
Baby Needs	all [Consumer Segment]	0.0 %
	Ethnic Interests	0.0 %
	Gourmet Shoppers	0.0 %
	Livin Large	0.0 %
	Natural N Healthy	0.0 %
	Simply Seniors	0.0 %
	Soccer Moms	0.0 %
	Value Seekers	0.0 %
Baby Food	all [Consumer Segment]	0.0 %
	Ethnic Interests	0.0 %
	Gourmet Shoppers	0.0 %
	Livin Large	0.0 %
	Natural N Healthy	0.0 %
	Simply Seniors	0.0 %
	Soccer Moms	0.0 %
	Value Seekers	0.0 %

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

**Table 3–11 Assign Consumer Segment Distribution Measure**

Label	Definition
Consumer Seg Distribution	The presence of different consumer segments constituting a market, typically seen at the cluster or trading area level and above.

## Assign Consumer Segment Status View

Use this view to assign primary consumer segments (or target consumer segments) to a category and store cluster. The Strategies exported to ORASE are identified by using the primary consumer segments defined here. Note that only a few strategies are assigned at the consumer segment level.

When store clusters are updated with new imports from ORASE, the primary consumer segments should be updated in this view.

**Figure 3–13 Assign Consumer Segment Status View**

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

**Table 3–12 Assign Consumer Segment Status Measure**

Label	Definition
WP Consumer Seg Status	<p>Indicates the importance of a consumer segment to the retailer. It is used to identify the target consumer segments in a working plan assortment. It can have values such as primary, secondary, and so on.</p> <p><b>Note:</b> Associates the consumer segment with the store cluster for the purpose of exporting the correct assigned status to ORASE.</p>

## 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 expand the assortment or increase Private Labels (PL). 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 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 3–14 Set Default Tactics View**

		Assortment	Inventory	Pricing	Promotion	Space
WP Tactic Values	01	Maintain	Maintain	Market	Aggressive	Maintain
	02	Decrease	Increase	Meet	Promote	Increase
	03	Increase	Decrease	Be within X%	Coupon	Decrease
	04	Refresh -	Increase PL	Loyalty	Seasonal	Change
	05	Increase PL		Maintain	Tailor Offers	Adjust
	06	Decrease PL		Increase	Funded	
	07	Expand Sub-		Decrease		
	08					
	09					
	10					

Table 3–13 lists the measure available in this view.

**Table 3–13 Set Default Tactics Measure**

Label	Definition
WP Tactic Values	List of tactics' values used to assign a tactic to a sub-category as part of the category plan. Tactics represent the suggested actions in a tactical area such as Assortment, Pricing, Space, and so on, in alignment with the role and strategy for a category and sub-category to meet the business targets.

## Space Related Tactics View

Use the Space Related Tactics view to set the default space tactics options. These default space tactics then appear as the drop-down selection options in the Assign Tactics view.

**Figure 3–15 Space Related Tactics View**

	WP Tactic Values
Assortment	<input checked="" type="checkbox"/>
Inventory	<input type="checkbox"/>
Pricing	<input type="checkbox"/>
Promotion	<input type="checkbox"/>
Space	<input checked="" type="checkbox"/>

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

**Table 3–14 Space Related Tactics Measure**

Label	Definition
WP Tactic Values	List of tactics' values used to assign a tactic to a sub-category as part of the category plan. Tactics represent the suggested actions in a tactical area such as Assortment, Pricing, Space, and so on, in alignment with the role and strategy for a category and sub-category to meet the business targets.

## Calendar Mapping Step

This step has two views:

- [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 3–16 Quarter Mapping View**

		LY Quarter Mapping
▼ FY2011	1st Qtr, FY2011	q1_2012
	2nd Qtr, FY2011	q2_2012
	3rd Qtr, FY2011	q3_2012
	4th Qtr, FY2011	q4_2012
▼ FY2012	1st Qtr, FY2012	q1_2013
	2nd Qtr, FY2012	q2_2013
	3rd Qtr, FY2012	q3_2013
	4th Qtr, FY2012	q4_2013
▼ FY2013	1st Qtr, FY2013	q1_2014
	2nd Qtr, FY2013	q2_2014
	3rd Qtr, FY2013	q3_2014
	4th Qtr, FY2013	q4_2014
▼ FY2014	1st Qtr, FY2014	q1_2015
	2nd Qtr, FY2014	q1_2015
	3rd Qtr, FY2014	q1_2015
	4th Qtr, FY2014	q1_2015
▼ FY2015	1st Qtr, FY2015	

Table 3–15 lists the measure available in this view.

**Table 3–15 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 3–17 Week Mapping View**

	Feb, FY2014				Mar, FY2014				
	2/8/2014	2/15/2014	2/22/2014	3/1/2014	3/8/2014	3/15/2014	3/22/2014	3/29/2014	4/5/2014
Week Position	w01_2014	w02_2014	w03_2014	w04_2014	w05_2014	w06_2014	w07_2014	w08_2014	w09_2014
LY Week Mapping	W01_2015	W02_2015	W03_2015	W04_2015	W05_2015	W06_2015	W07_2015	W08_2015	W09_2015

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

**Table 3–16 Week Mapping Measures**

Label	Definition
Week Position	Administrator Default Value Week Position Text.
LY Week Mapping	Identifies the week used for mappings 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. For more details, refer to the definition of DT SKU CutOff % in Table 3–17.

**Figure 3–18 Assign DT SKU Cutoff View**

	All Trade Areas	e-commerce USA	Northeast	Northwest	Southeast	Southwest
Shelf Stable Grocery	90.0 %	100.0 %	100.0 %	90.0 %	100.0 %	100.0 %
> Baby Needs	100.0 %	100.0 %	100.0 %	100.0 %	100.0 %	100.0 %
> Dry Goods	100.0 %	100.0 %	100.0 %	100.0 %	100.0 %	100.0 %
Shelf Stable	90.0 %	100.0 %	100.0 %	90.0 %	100.0 %	100.0 %
Coffee	90.0 %	100.0 %	100.0 %	90.0 %	100.0 %	100.0 %
Ground	90.0 %	100.0 %	100.0 %	90.0 %	100.0 %	100.0 %
Instant	90.0 %	100.0 %	100.0 %	90.0 %	100.0 %	100.0 %
Single	90.0 %	100.0 %	100.0 %	90.0 %	100.0 %	100.0 %
Whole	90.0 %	100.0 %	100.0 %	90.0 %	100.0 %	100.0 %
> Juice	100.0 %	100.0 %	100.0 %	100.0 %	100.0 %	100.0 %
> Snacks	100.0 %	100.0 %	100.0 %	100.0 %	100.0 %	100.0 %

Table 3–17 lists the measure available in this view.

**Table 3–17 Assign DT SKU Cutoff Measure**

Label	Definition
DT SKU Cutoff %	<p>DT SKU Cut-Off % refers to the percentage of substitutable demand of a SKU. It is used in calculating the number of significant substitute SKUs. It defines the total amount of spread of substitutable demand among the substitute SKUs, shown in the DT Details type of view. This cut-off percentage is required to avoid looking at the tapered substitutable demand or tail of the substitutable demand which is very thinly spread across the substitute SKUs.</p> <p>For example, 90% of the substitutable demand of a SKU spreads to 5 items but the remaining 10% spreads to another 20 items. So, in such a case, if DT Cut-Off % = 90%, then tapered substitutable demand of 10% is not considered while calculating the number of significant substitute SKUs.</p> <p>But in case there is no tapering effect in substitutable demand, then it is best to keep DT Cut-Off % at 100%.</p>

## Manage MSO Tables Step

Before performing MSO, the MSO tables should be populated in this step. The MSO tables form the basis of MSO and are maintained by an administrator. These tables are used to store a relationship between the allocated space and the respective gross profit returns at the retailer based on historic data. MSO tables are also Space Profit tables and Space Profit elasticity curves, which are derived using Advanced Science algorithms.

This step helps users to create/manage MSO tables for the POG Department and POG Sub-Category levels. The MSO tables are consumed by the special expression/API which generates optimized space and profits for the two POG hierarchy levels. The MSO tables can be systemically loaded using space elasticity models or through this step where administrators/implementation team populate the tables manually or systematically.

Following is a recommended approach to populate the MSO tables:

- Identify key business considerations that can impact space profitability in the retailer's business.
- Combine retail business insights and data with statistical modeling best practices to generate elasticity models.
- Following is an example of an Elasticity model that can be configured into the RPAS Planning platform:

**Figure 3–19 Elasticity Model Example**

$$\text{Sales} = a \cdot P^b \cdot T^c \cdot \text{Space}^\tau$$

- Sales modeled on:
  - P = Productivity
  - T = Number of weekly Transactions
  - Space (Optimization Variable)
- Model parameters (a,b,c,τ) are estimated using historical data
- Key output is the coefficient for the Space variable
  - τ = Space Elasticity

For more information on space planning and MSO, see [Chapter 5](#) and [Chapter 6](#).

This step has the following views:

- [Manage MSO Tables @Dept View](#)
- [Manage MSO Tables @Sub-Category View](#)

## Manage MSO Tables @Dept View

This view is used to maintain the data in the Space Profit tables at the POG Department level. This view presents two measures: MD WP POG Length Square Units and MD WP POG Gross Profit R. [Figure 3–20](#) shows an example of this view presenting the Space Profit table information for a POG Department.

**Figure 3–20 Manage MSO Tables @Dept View**

	MD WP POG Length Square Units	MD WP POG Gross Profit R
01	0.00	0.0k
02	0.00	0.0k
03	0.00	0.0k
04	0.00	0.0k
05	0.00	0.0k
06	0.00	0.0k
07	0.00	0.0k
08	0.00	0.0k
09	0.00	0.0k
10	0.00	0.0k
11	0.00	0.0k
12	0.00	0.0k
13	0.00	0.0k
14	0.00	0.0k
15	0.00	0.0k
16	0.00	0.0k
17	0.00	0.0k
18	0.00	0.0k
19	0.00	0.0k
20	0.00	0.0k

[Table 3–18](#) lists the measures available in this view.

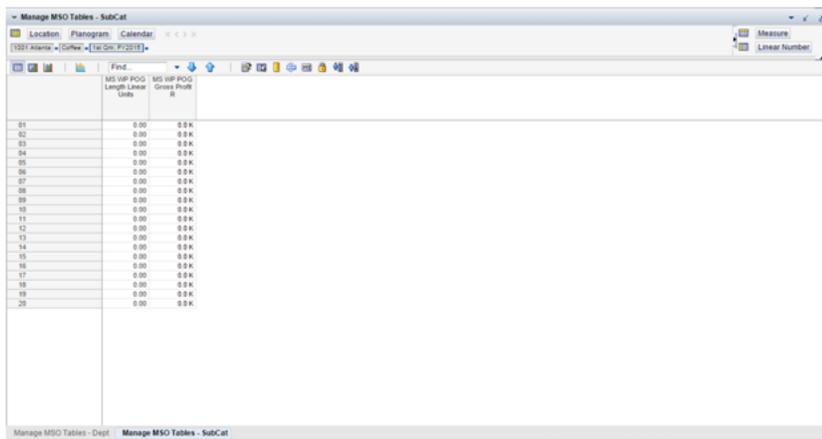
**Table 3–18 Manage MSO Tables @Dept View Measures**

Label	Description
MD WP POG Length Square Units	POG Department's (or Department Zone's) space in terms of the selling area in square units.
MD WP POG Gross Profit R	POG Department's (or Department Zone's) gross profit retail value. It is the corresponding value of gross profit to the POG Department's selling area.

## Manage MSO Tables @Sub-Category View

This view is used to maintain data in the Space Profit tables at the POG Sub-Category level. This view presents two measures: MS WP POG Length Linear Units and MS WP POG Gross Profit R. [Figure 3–21](#) shows an example of this view presenting the Space Profit table information for a POG Sub-Category.

**Figure 3–21** Manage MSO Tables @Sub-Category View



[Table 3–19](#) lists the measures available in this view.

**Table 3–19** Manage MSO Tables @Sub-Category View Measures

Label	Description
MS WP POG Length Linear Units	POG Sub-Category's space in linear units.
MS WP POG Gross Profit R	POG Sub-Category's gross profit retail value corresponding to the POG Sub-Category's space in linear units.

## Like Sub-Category Mapping Step

This step is used to populate the MSO tables for new POG Sub-Categories by mapping them to the existing POG Sub-Categories. This facilitates the participation of the new sub-categories in the MSO process.

This step has one view.

### Like Sub-Category Mapping View

A new POG Sub-Category can be cloned, using a maximum of three existing Sub-Category/Store combinations, as a clone source. Choose the existing POG Sub-Categories (or Store) from the drop-down menu. Set the contribution percentage of the respective POG Sub-Category/Store combination being used to clone the new POG Sub-Category. Execute the Clone Like Sub-Category custom menu. The MSO tables for a new POG Sub-Category are populated on the basis of the defined contribution percentages.

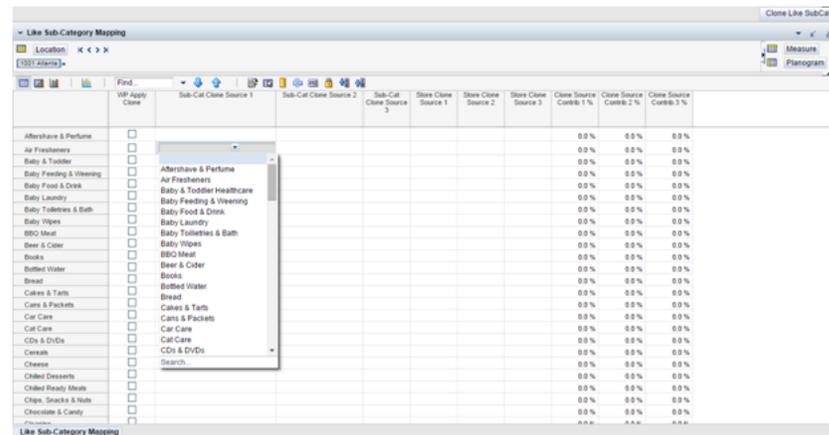
**Figure 3–22 Like Sub-Category Mapping View**

Table 3–20 lists the measures available in this view.

**Table 3–20 Like Sub-Category Mapping View Measures**

Label	Description
WP Apply Clone	Boolean measure that needs to be checked to run the Like Sub-Category custom menu.
Sub-Cat Clone Source 1	Contains a drop-down list that has the existing sub-categories from which to select a sub-category to be used as the first sub-category source to map and populate the new sub-category's MSO tables.
Sub-Cat Clone Source 2	Contains a drop-down list that has the existing sub-categories from which to select a sub-category to be used as the second sub-category source to map and populate the new sub-category's MSO tables.
Sub-Cat Clone Source 3	Contains a drop-down list that has the existing sub-categories from which to select a sub-category to be used as the third sub-category source to map and populate the new sub-category's MSO tables.
Store Clone Source 1	Contains a drop-down list that has the stores from which to select a store corresponding to the first sub-category source to map and populate the new sub-category.
Store Clone Source 2	Contains a drop-down list that has the stores from which to select a store corresponding to the second sub-category source to map and populate the new sub-category.
Store Clone Source 3	Contains a drop-down list that has the stores from which to select a store corresponding to the third sub-category source to map and populate the new sub-category.
Clone Source Contrib 1 %	Contribution percentage from the first sub-category source and corresponding store used to derive the MSO tables of the new sub-category.
Clone Source Contrib 2 %	Contribution percentage from the second sub-category source and corresponding store used to derive the MSO tables of the new sub-category.
Clone Source Contrib 3 %	Contribution percentage from the third sub-category source and corresponding store used to derive the MSO tables of the new sub-category.

## POG and PROD Hierarchy Mapping Step

Use this step to define the relationship between the POG and PROD hierarchies in terms of the distribution percentage.

The POG hierarchy represents the store layout and depicts the manner in which products are merchandised in the store. It consists of three levels:

- POG Department equivalent to Department Zone in the store layout
- POG Category equivalent to Category in the PROD hierarchy
- POG Sub-Category equivalent to Sub-Category in the PROD hierarchy

The PROD hierarchy is mainly used in the back-end for Category Management, which includes defining roles, strategies, tactics, buying, pricing, promotions, assortment planning, and supply chain management.

The POG hierarchy is specifically used to define how the front-end of the store looks. Store layouts and planograms form the basis of the POG hierarchy. The POG hierarchy depicts the way a store is presented to the customer. MSO and Space Planning are based on the POG hierarchy in place of the PROD hierarchy.

For more information on space planning and MSO, see [Chapter 5](#) and [Chapter 6](#).

This step has the following views:

- [POG and PROD Hierarchy Mapping @Dept View](#)
- [POG and PROD Hierarchy Mapping @Sub-Category View](#)

### POG and PROD Hierarchy Mapping @Dept View

This view is used to define the relationship between the POG and PROD hierarchies at the department level. The POG hierarchy (Y-Axis) is presented against the PROD hierarchy (X-Axis) in this view, so that mapping can be done between the POG Departments and Departments (from the PROD hierarchy). Check the relevant check boxes and set the distribution percentages for deriving the target sales retail for the POG Departments.

**Figure 3–23 POG and PROD Hierarchy Mapping @Dept View**

	Baby Needs		Dry Goods		Shelf Stable Beverages		Snacks	
	Distribution	POG/PROD	Distribution	POG/PROD	Distribution	POG/PROD	Distribution	POG/PROD
Baby	0.0%	<input type="checkbox"/>	0.0%	<input type="checkbox"/>	0.0%	<input type="checkbox"/>	0.0%	<input type="checkbox"/>
Bakery	0.0%	<input type="checkbox"/>	0.0%	<input type="checkbox"/>	0.0%	<input type="checkbox"/>	0.0%	<input type="checkbox"/>
Beverages	0.0%	<input type="checkbox"/>	0.0%	<input type="checkbox"/>	0.0%	<input type="checkbox"/>	0.0%	<input type="checkbox"/>
Drygoods	0.0%	<input type="checkbox"/>	0.0%	<input type="checkbox"/>	0.0%	<input type="checkbox"/>	0.0%	<input type="checkbox"/>
Fresh	0.0%	<input type="checkbox"/>	0.0%	<input type="checkbox"/>	0.0%	<input type="checkbox"/>	0.0%	<input type="checkbox"/>
Frozen	0.0%	<input type="checkbox"/>	0.0%	<input type="checkbox"/>	0.0%	<input type="checkbox"/>	0.0%	<input type="checkbox"/>
Health & Beauty	0.0%	<input type="checkbox"/>	0.0%	<input type="checkbox"/>	0.0%	<input type="checkbox"/>	0.0%	<input type="checkbox"/>
Household	0.0%	<input type="checkbox"/>	0.0%	<input type="checkbox"/>	0.0%	<input type="checkbox"/>	0.0%	<input type="checkbox"/>
Investment	0.0%	<input type="checkbox"/>	0.0%	<input type="checkbox"/>	0.0%	<input type="checkbox"/>	0.0%	<input type="checkbox"/>
Pet Care	0.0%	<input type="checkbox"/>	0.0%	<input type="checkbox"/>	0.0%	<input type="checkbox"/>	0.0%	<input type="checkbox"/>

Table 3–21 lists the measures available in this view.

**Table 3–21 POG and PROD Hierarchy Mapping @Dept View Measures**

Label	Description
Distribution %	Distribution percentage used to map a POG Department to a Department (from the PROD hierarchy) to calculate the target sales retail value for the POG Departments using the Department targets from the Category Plan.
POG/PROD Mapping - Dept	Flag measure (Boolean measure) used to check the mapping of a POG Department and Department (from the PROD hierarchy).

## POG and PROD Hierarchy Mapping @Sub-Category View

This view is used to define the relationship between the POG and PROD hierarchies at the sub-category level. The POG hierarchy (Y-Axis) is presented against the product hierarchy (X-Axis) in this view, so that mapping can be done between the POG Sub-Categories and Sub-Categories (from the PROD hierarchy). Select the relevant check boxes and set the distribution percentages.

**Figure 3–24 POG and PROD Hierarchy Mapping @Sub-Category View**

Table 3–22 lists the measures available in this view.

**Table 3–22 POG and PROD Hierarchy Mapping @Sub-Category View Measures**

Label	Description
Distribution %	Distribution percentage used to map a POG Sub-Category to a Sub-Category (from the PROD hierarchy) to calculate the target sales retail value for the POG Sub-Category using the Sub-Category's targets from the Category Plan.
POG/PROD Mapping - Sub-Category	Flag measure (Boolean measure) used to check the mapping of a POG Department and Department (from the PROD hierarchy).

## Placeholder and Formalized Items Step

This step in Category Management Administration is used to store the formalization information for placeholder items.

Placeholder items are created in RPAS using DPM in the Assortment Planning tasks. Note that when creating placeholder items, the item name and label should be maintained symmetrically in the RHS (Right Hand Side) Product hierarchy.

Placeholder items' details need to be shared with RMS (or a Master Data Management (MDM) system) which owns the system of record for items. RMS in turn creates formal items/SKUs with the information supplied by RCM. Formalization information consisting of mapping between the DPM position number (or placeholder item number) and formalized item number needs to be shared with RCM.

This step has one view.

## Placeholder and Formalized Items View

Imported formalization information from RMS or an MDM system is presented in this view. This is a read-only view. Formalization information consists of the mapping between formal items and placeholder items. Formalization information is stored in the Placeholder Item, Placeholder Item Label, Formalized Item, and Formalized Item Label measures.

After importing formalization information from RMS, standard RPAS functionality (through a nightly batch) is used to complete the formalization of placeholder items.

Formalization involves renaming the placeholder items' DPM position (stored separately in the Placeholder Item measure) with the actual position (stored in the Formalized Item measure). Similarly, the Formalized Item Label measure is updated for the placeholder items. The placeholder items' RHS Product Hierarchy details are also updated through formalization.

The workbooks containing the placeholder items need to be rebuilt for the formalization items to be reflected there.

**Figure 3–25 Placeholder and Formalized Items View**

	Placeholder Item	Placeholder Item Label	Formalized Item	Formalized Item Label
543211 Boudins - Loaf White				
543212 Boudins - Loaf Wheat				
543213 Boudins - Loaf Sourdough				
543214 Boudins - Sourdough Round				
543215 Boudins - Baguette White				
543216 Rudis - Loaf White				
543217 Rudis - Loaf Wheat				
543218 Rudis - Loaf Cinnamon Raisin				
543219 Nature's Own - Loaf White				
543220 Nature's Own - Loaf Wheat				
543221 Nature's Own - Loaf Honey Wheat				
543222 Nature's Own - Loaf Multigrain				

Table 3–23 lists the measures available in this view.

**Table 3–23 Placeholder and Formalized Items View Measures**

Label	Description
Placeholder Item	Used to store the placeholder item number. Placeholder items are created using DP and their DPM position number serves as the placeholder item number.
Placeholder Item Label	Used to store the placeholder item label. Placeholder items are created using DPM.

**Table 3–23 (Cont.) Placeholder and Formalized Items View Measures**

<b>Label</b>	<b>Description</b>
Formalized Item	Used to store the formalized item number. Formalized items are created in RMS or an MDM system against the placeholder items created in RCM.
Formalized Item Label	Used to store the formalized item label. Formalized items are created in RMS or an MDM system against the placeholder items created in RCM.



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## 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 such as syndicated market data, syndicated household panel data, retailer's actuals and forecast data, loyalty program data, and so on. The analysis of this information brings in an understanding of a category's business from an internal performance, market, and consumer perspective which drives 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.

Category planning is used to define the retailer's strategy and determine how to assign category roles while allocating resources to available business opportunities. The lowest level of the location hierarchy under the category planning task, at which category planning is done and various analyses are presented, is trading area.

This task has the following steps:

- [Category Performance Review Step](#)
- [Review Retail Strategy Step](#)
- [Assign Category Role Step](#)
- [Assign Category Strategies Step](#)
- [Assign Category Tactics Step](#)
- [Set Targets and Approve Category Plan Step](#)

The following data is required for this task:

- Predefined consumer segments presented as foundation data such as product hierarchy, location hierarchy, and calendar hierarchy, loaded as part of domain setup
- Consumer segment distribution
- Predefined trading areas as part of the location hierarchy, which is again loaded as part of the domain setup
- Predefined tactics pick list and week/quarter mapping information from the administration workbooks
- Forecast from Oracle Retail Demand Forecasting (RDF)
- POS data of the retailer

- Market and household panel data from external sources, such as Nielsen, Symphony, IRI, and so on, needed for performing activities which consider market or consumer performance
- All external data precomputed or aggregated and not required to be recomputed within Category Planning

## Create the Category Planning Workbook

To create the workbook:

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

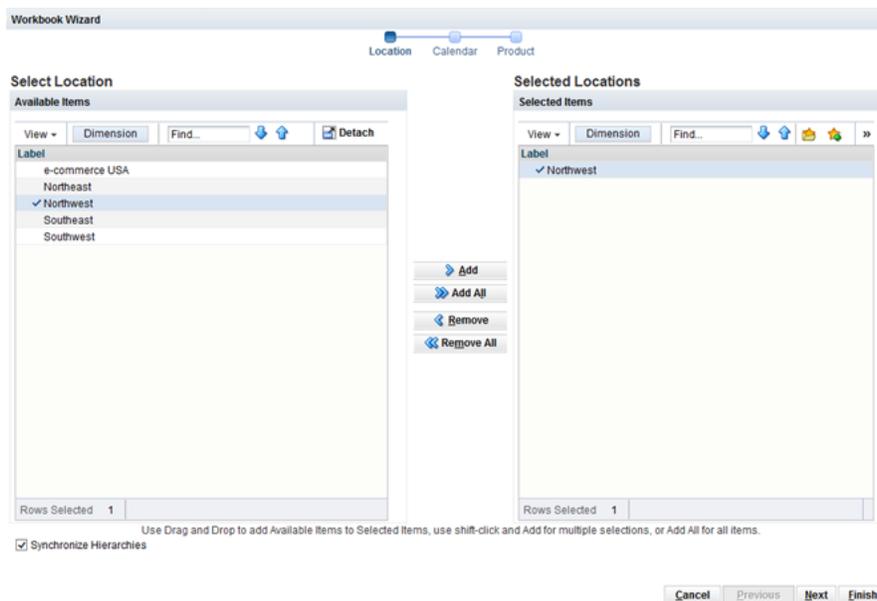
**Figure 4–1 Category Planning Task**

Task or Step	Action
Category Planning	  
Category Performance Review	  
Review Retail Strategy	  
Assign Category Role	  
Assign Category Strategies	  
Assign Category Tactics	  
Set Targets and Approve Category Plan	  

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**



Workbook Wizard

Location Calendar Product

Select Location

Available Items

View - Dimension Find... Detach

Label

e-commerce USA

Northeast

✓ Northwest

Southeast

Southwest

Rows Selected 1

Selected Locations

Selected Items

View - Dimension Find... Detach

Label

✓ Northwest

Rows Selected 1

Use Drag and Drop to add Available Items to Selected Items, use shift-click and Add for multiple selections, or Add All for all items.

Synchronize Hierarchies

Cancel Previous Next Finish

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

Figure 4–3 Workbook Wizard Select Periods Page

Workbook Wizard

Location Calendar Product

**Select Period**

Available Items

View - Dimension Find... [Icons] Detach

Label
1st Qtr, FY2011
2nd Qtr, FY2011
3rd Qtr, FY2011
4th Qtr, FY2011
1st Qtr, FY2012
2nd Qtr, FY2012
3rd Qtr, FY2012
4th Qtr, FY2012
✓ 1st Qtr, FY2013
✓ 2nd Qtr, FY2013
✓ 3rd Qtr, FY2013
✓ 4th Qtr, FY2013
✓ 1st Qtr, FY2014
✓ 2nd Qtr, FY2014
✓ 3rd Qtr, FY2014
✓ 4th Qtr, FY2014
1st Qtr, FY2015

Rows Selected 8

Use Drag and Drop to add Available Items to Selected Items, use shift-click and Add for multiple selections, or Add All for all items.

Synchronize Hierarchies

Selected Periods

Selected Items

View - Dimension Find... [Icons] »

Label
✓ 1st Qtr, FY2013
✓ 2nd Qtr, FY2013
✓ 3rd Qtr, FY2013
✓ 4th Qtr, FY2013
✓ 1st Qtr, FY2014
✓ 2nd Qtr, FY2014
✓ 3rd Qtr, FY2014
✓ 4th Qtr, FY2014

Rows Selected 8

Cancel Previous Next Finish

- Select the categories and move them to the Selected Items box. Click **Finish**.

Figure 4–4 Workbook Wizard Select Category Page

Workbook Wizard

Location Calendar Product

**Select Category**

Available Items

View - Dimension Find... [Icons] Detach

Label
Baby Food
Canned Vegetables
✓ Coffee
Cookies
Juice
Pasta
Salty Snacks

Rows Selected 1

Use Drag and Drop to add Available Items to Selected Items, use shift-click and Add for multiple selections, or Add All for all items.

Synchronize Hierarchies

Selected Categories

Selected Items

View - Dimension Find... [Icons] »

Label
✓ Coffee

Rows Selected 1

Cancel Previous Next Finish

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 assessment is made during the in-season to see the variance between plan and actuals 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 such as Sales, Gross Profit, and so on:

- Sales
- Promo Sales
- Private Label Sales

**Figure 4–5 Scorecard Summary Sales Measure Profile View**

	Ground	Instant	Single Serve	Whole
LY Sales R	98,274.8 K	48,384.5 K	10,041.0 K	21,733.1 K
WP Sales R	98,274.8 K	48,384.5 K	10,041.0 K	21,733.1 K
WP Sales var to LY R	0.0 %	0.0 %	0.0 %	0.0 %
OP Sales R	0.0 K	0.0 K	0.0 K	0.0 K
OP Sales var to LY R	-100.0 %	-100.0 %	-100.0 %	-100.0 %
LY Gross Profit R	26,896.8 K	11,245.7 K	3,040.4 K	7,433.5 K
LY Gross Profit %	27.4 %	23.2 %	30.3 %	34.2 %
WP Gross Profit R	26,896.8 K	11,245.7 K	3,040.4 K	7,433.5 K
WP Gross Profit %	27.4 %	23.2 %	30.3 %	34.2 %
WP Gross Profit var to LY R	0.0 %	0.0 %	0.0 %	0.0 %
OP Gross Profit R	0.0 K	0.0 K	0.0 K	0.0 K
OP Gross Profit %	0.0 %	0.0 %	0.0 %	0.0 %
OP Gross Profit var to LY R	-100.0 %	-100.0 %	-100.0 %	-100.0 %
LY Avg Inv R	9,528.8 K	4,691.0 K	969.5 K	2,111.8 K
WP Avg Inv R	8,662.5 K	4,264.5 K	881.4 K	1,919.8 K
OP Avg Inv R	0.0 K	0.0 K	0.0 K	0.0 K
LY Turn	10.3	10.3	10.4	10.3
WP Turn	11.3	11.3	11.4	11.3
OP Turn	0.0	0.0	0.0	0.0

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	Sales retail value, for a category or sub-category, per last year's actuals.
WP Sales R	Sales retail value, for a category or sub-category, in the working plan version of the category plan.
WP Sales var to LY R	The working plan's sales retail value's variance to the same in last year's actuals.
OP Sales R	The original plan assortment's sales retail value. The original plan represents the approved category plan and is used in assortment planning as the target sales retail value.
OP Sales var to LY R	The original plan's sales retail value's variance to the same in last year's actuals.
LY Gross Profit R	Last year's gross profit retail value (actuals) from the merchandise at the category and sub-category levels.

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

<b>Label</b>	<b>Definition</b>
LY Gross Profit %	Last year's gross profit percentage from the merchandise at the category and sub-category levels.
WP Gross Profit R	The gross profit retail value from the merchandise in the working plan version of the category plan.
WP Gross Profit %	The gross profit percentage from the merchandise in the working plan version of the category plan.
WP Gross Profit var to LY R	The working plan's gross profit retail value's variance to last year's gross profit retail value actuals.
OP Gross Profit R	Approved category plan's (referred to as original plan) gross profit retail value. It is shared as a target with assortment planning and MSO.
OP Gross Profit %	Approved category plan's (referred to as original plan) gross profit percentage. It is shared as a target with assortment planning and MSO.
OP Gross Profit var to LY	The original plan's gross profit value's variance to the same in last year's actuals.
LY Avg Inv R	The average inventory retail value or stock retail value carried by the category or sub-category per last year's actuals. Average inventory retail value represents an average retail value of merchandise bought, received, and carried by the retailer before it gets sold at any point in time. This average inventory retail value is generally calculated on a weekly basis or a monthly basis to get an understanding of the money invested in inventory or buying merchandise.
WP Avg Inv R	The average inventory retail value to be carried by a category or sub-category in a given planning period, per the category plan's working plan version.
OP Avg Inv R	Average inventory retail value to be carried by a category or sub-category per the approved category plan or original plan.
LY Turn	Inventory turns per last year's actuals. It reflects the number of times the average inventory carried can be sold over a specified period of time.
WP Turn	Inventory turns in the working plan version of the category plan. It reflects the number of times the average inventory carried can be sold over a specified period of time.
OP Turn	Inventory turns in the approved category plan or original plan. It reflects the number of times the average inventory carried can be sold over a specified period of time.

**Figure 4–6 Scorecard Summary Promo Sales Measure Profile View**

	Coffee				
	Ground	Instant	Single Serve	Whole	
LY Sales R	98,274.8 K	48,384.5 K	10,041.0 K	18,116.1 K	21,733.1 K
WP Sales R	98,274.8 K	48,384.5 K	10,041.0 K	18,116.1 K	21,733.1 K
WP Sales var to LY R	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
OP Sales R	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K
OP Sales var to LY R	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
LY Promo Sales R	23,352.6 K	11,083.1 K	2,018.1 K	5,772.6 K	4,478.8 K
LY Promo Sales contrib to LY Sales R	23.8 %	22.9 %	20.1 %	31.9 %	20.6 %
WP Promo Sales R	25,219.1 K	9,636.5 K	3,721.7 K	6,080.8 K	5,780.2 K
WP Promo Sales contrib to WP Sales R	25.7 %	19.9 %	37.1 %	33.6 %	26.6 %
WP Promo Sales var to LY R	8.0 %	-13.1 %	84.4 %	5.3 %	29.1 %
OP Promo Sales R	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K
OP Promo Sales contrib to OP Sales R	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
OP Promo Sales var to LY R	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
LY Gross Profit R	26,896.8 K	11,245.7 K	3,040.4 K	5,177.2 K	7,433.5 K
LY Gross Profit %	27.4 %	23.2 %	30.3 %	28.6 %	34.2 %
WP Gross Profit R	26,896.8 K	11,245.7 K	3,040.4 K	5,177.2 K	7,433.5 K
WP Gross Profit %	27.4 %	23.2 %	30.3 %	28.6 %	34.2 %
WP Gross Profit var to LY R	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
OP Gross Profit R	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K
OP Gross Profit %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
OP Gross Profit var to LY R	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %

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	Sales retail value, for a category or sub-category, per last year's actuals.
WP Sales R	Sales retail value, for a category or sub-category, per the working plan version of the category plan.
WP Sales var to LY R	The working plan's sales retail value's variance to the same in last year's actuals.
OP Sales R	Approved category plan's (referred to as original plan) sales retail value. It is shared as a target with assortment planning and MSO.
OP Sales var to LY R	The original plan's sales retail value's variance to the same in last year's actuals.
LY Promo Sales R	Last year's promotional sales retail value actuals.
LY Promo Sales contrib to LY Sales R	Last year's promotional sales retail contribution, in percentage points, to the overall sales retail of last year's actuals.
Wp Promo Sales R	Promotional sales retail in the working plan version of the category plan.
WP Promo Sales contrib to WP Sales R	The promotional sales retail contribution, in percentage points, to the overall sales retail of the working plan version of the category plan.
WP Promo Sales var to LY R	The working plan's promotional sales retail value's variance to the same in last year plan's actuals.
OP Promo Sales R	Promotional sales retail in the original plan assortment.

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

<b>Label</b>	<b>Definition</b>
OP Promo Sales contrib to OP Sales R	The original plan's promotional sales retail value's variance to the same in last year plan's actuals.
OP Promo Sales var to LY R	The original plan's promotional sales retail value's variance to the same in last year's actuals.
LY Gross Profit R	Last year's gross profit retail value (actuals) from the merchandise.
LY Gross Profit %	Last year's gross profit percentage from the merchandise.
WP Gross Profit R	The gross profit retail value from the merchandise in the working plan version of the category plan.
WP Gross Profit %	The gross profit percentage from the merchandise in the working plan version of the category plan.
WP Gross Profit var to LY R	The working plan's gross profit retail value's variance to last year's gross profit retail value actuals.
OP Gross Profit R	Approved category plan's (referred to as original plan) gross profit retail value. It is shared as a target with assortment planning and MSO.
OP Gross Profit %	Approved category plan's (referred to as original plan) gross profit percentage. It is shared as a target with assortment planning and MSO.
OP Gross Profit var to LY R	Gross profit retail value variance between the original plan and last year's actuals.

**Figure 4–7 Scorecard Summary Private Label Measure Profile View**

	Coffee	Ground	Instant	Single Serve	Whole
LY Sales R	98,274.8 K	48,384.5 K	10,041.0 K	18,116.1 K	21,733.1 K
WP Sales R	98,274.8 K	48,384.5 K	10,041.0 K	18,116.1 K	21,733.1 K
WP Sales var to LY R	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
OP Sales R	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K
OP Sales var to LY R	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
LY Private Label Sales R	7,950.1 K	4,694.5 K	0.0 K	3,255.6 K	0.0 K
LY Private Label Sales contrib to LY Sales R	8.1 %	9.7 %	0.0 %	18.0 %	0.0 %
WP Private Label Sales R	7,950.1 K	4,694.5 K	0.0 K	3,255.6 K	0.0 K
WP Private Label Sales contrib to WP Sales R	8.1 %	9.7 %	0.0 %	18.0 %	0.0 %
WP Private Label Sales var to LY R	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
OP Private Label Sales R	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K
OP Private Label Sales contrib to OP Sales R	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
OP Private Label Sales var to LY R	-100.0 %	-100.0 %	0.0 %	-100.0 %	0.0 %
LY Gross Profit R	26,896.8 K	11,245.7 K	3,040.4 K	5,177.2 K	7,433.5 K
LY Gross Profit %	27.4 %	23.2 %	30.3 %	28.6 %	34.2 %
WP Gross Profit R	26,896.8 K	11,245.7 K	3,040.4 K	5,177.2 K	7,433.5 K
WP Gross Profit %	27.4 %	23.2 %	30.3 %	28.6 %	34.2 %
WP Gross Profit var to LY R	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
OP Gross Profit R	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K
OP Gross Profit %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
OP Gross Profit var to LY R	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
LY Private Label Gross Profit R	3,942.3 K	2,244.2 K	0.0 K	1,698.1 K	0.0 K
LY Private Label Gross Profit %	49.6 %	47.8 %	0.0 %	52.2 %	0.0 %
WP Private Label Gross Profit R	3,942.3 K	2,244.2 K	0.0 K	1,698.1 K	0.0 K
WP Private Label Gross Profit %	49.6 %	47.8 %	0.0 %	52.2 %	0.0 %
WP Private Label Gross Profit var to LY R	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
OP Private Label Gross Profit R	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K
OP Private Label Gross Profit %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
OP Private Label Gross Profit var to LY R	-100.0 %	-100.0 %	0.0 %	-100.0 %	0.0 %

Table 4–3 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	Sales retail value, for a category or sub-category, per last year's actuals.
WP Sales R	Sales retail value, for a category or sub-category, per the working plan version of the category plan.
WP Sales var to LY R	The working plan's sales retail value's variance to the same in last year's actuals.
OP Sales R	Approved category plan's (referred to as original plan) sales retail value. It is shared as a target with assortment planning and MSO.
OP Sales var to LY R	The original plan's sales retail value's variance to the same in last year's actuals.
LY Private Label Sales R	Sales retail value from private label merchandise, for a category or sub-category, per last year's actuals.
LY Private Label Sales contrib to LY Sales R	Last year's sales retail contribution of private label merchandise to the overall sales retail in last year's actuals expressed in percentage points.
WP Private Label Sales R	The private label items' sales retail value in a working plan version of the category plan.

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

<b>Label</b>	<b>Definition</b>
WP Private Label Sales contrib to WP Sales R	The sales retail contribution of private label merchandise to the overall sales retail of the working plan version of the category plan expressed in percentage points.
WP Private Label Sales var to LY R	The working plan's private label merchandise's sales retail variance to the same in last year's actuals.
OP Private Label Sales R	The private label items' sales retail value in the pre-season original plan assortment.
OP Private Label Sales contrib to OP Sales R	The original plan's private label sales retail value's contribution to the overall sales retail value in the original plan.
OP Private Label Sales var to LY R	The original plan's private label items' sales retail variance to the same in last year plan's actuals.
LY Gross Profit R	Last year's gross profit retail value (actuals) from the merchandise.
LY Gross Profit %	Last year's gross profit percentage from the merchandise.
WP Gross Profit R	The gross profit retail value from the merchandise in the working plan version of the category plan.
WP Gross Profit %	The gross profit percentage from the merchandise in the working plan version of the category plan.
WP Gross Profit var to LY R	The working plan's gross profit retail value's variance to last year's gross profit retail value actuals.
OP Gross Profit R	Approved category plan's (referred to as original plan) gross profit retail value. It is shared as a target with assortment planning and MSO.
OP Gross Profit %	Approved category plan's (referred to as original plan) gross profit retail percentage. It is shared as a target with assortment planning and MSO.
OP Gross Profit var to LY	Gross profit percentage from the merchandise per the original plan.
LY Private Label Gross Profit R	Gross profit retail of private label items in last year's assortment for the cluster.
LY Private Label Gross Profit %	Gross profit percentage of private label items in last year's assortment for the cluster.
WP Private Label Gross Profit R	The gross profit retail of private label items in a working plan assortment.
WP Private Label Gross Profit %	The gross profit percentage of private label items in a working plan assortment.
WP Private Label Gross Profit var to LY R	The working plan's private label items' gross profit retail's variance to the same in last year plan's actuals.
OP Private Label Gross Profit R	The original plan's private label merchandise's gross profit value. It is the original plan's sales retail value of private label merchandise sold minus the corresponding cost of goods sold (COGS).
OP Private Label Gross Profit %	The original plan's private label merchandise's gross profit value. It is the original plan's approved retail sales values minus the COGS. It is the whole divided by the retail sales value.
OP Private Label Gross Profit var to LY R	The original plan's private label merchandise's gross profit retail value's variation to last year's actuals.

## Review 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. The category plans should be rooted to, or based on, the business context or business situation. This step brings in that understanding of the business situation in the market in which the retailer competes in terms of the potential business, consumer profile composition, their respective spends, and so on. This sets the foundation for the category planning process to begin. The retail strategy should answer the following questions:

- Who are the retailer's target shoppers and is the retailer reaching them?
- 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 assign category roles and resources while allocating resources to opportunities?

This step has the following views:

1. [Analyze Target Shoppers View](#)
2. [Analyze Trading Area Opportunity View](#)
3. [Analyze Competition View](#)

### 1. Analyze Target Shoppers View

Use this view to analyze target shoppers. Consumer demographic and psychographic information is presented against their relative presence, contribution, and spend in the market compared with the retailer. This analysis provides an insight into whether or not the retailer is stronger compared to the total market with respect to a particular consumer demographic group. It specifically provides insight into the following:

- Composition of the consumers shopping at the retailer as compared to the overall market.
- The percentage of the total spending in that market from a specific consumer profile.

The view exists at the following levels:

- Consumer Profile in the form of demographic and psychographic parameters such as, household income, number of children, and so on
- Trading Area such as Chicago or Atlanta

Figure 4–8 1. Analyze Target Shoppers

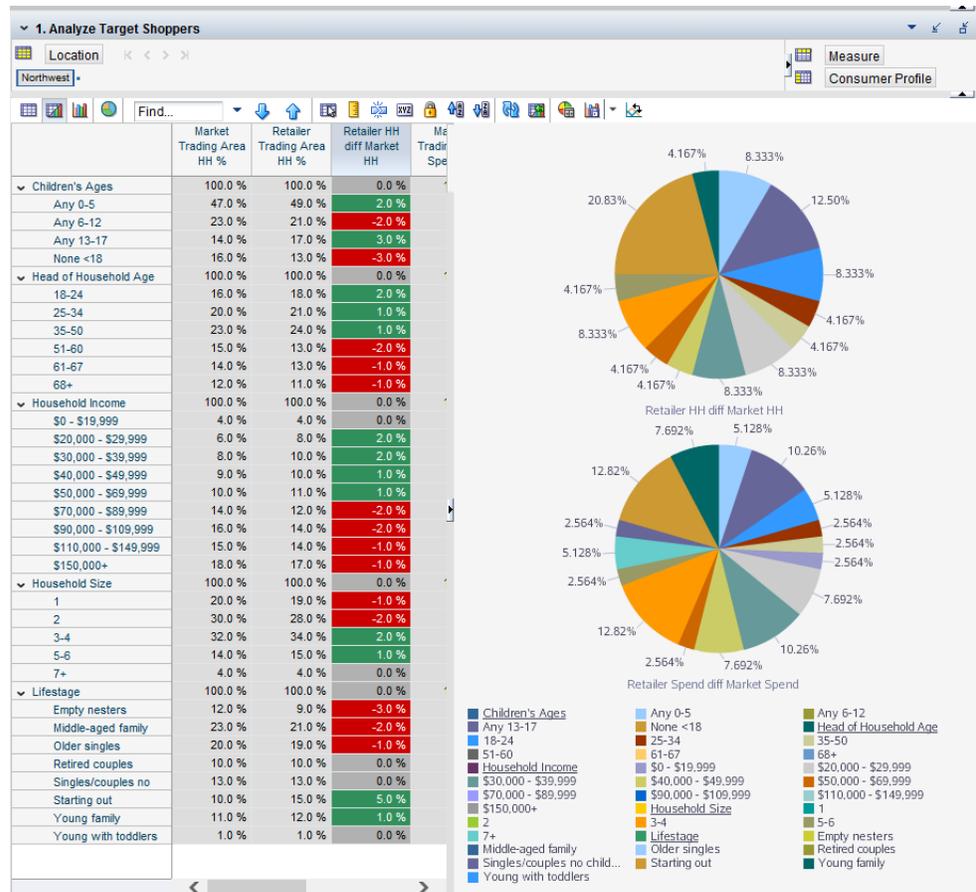


Table 4–4 lists the measures available in this view. The data is loaded from Household Panel data.

Table 4–4 1. Analyze Target Shoppers Measures

Label	Definition
Market Trading Area HH %	The percentage of market households that belong to a specific consumer segment profile based on meeting a specific demographic or psychographic parameter criteria.
Retailer Trading Area HH %	The percentage of market households that shop at the retailer and belong to a specific consumer segment profile based on meeting a specific demographic or psychographic parameter criteria.
Retailer HH diff Market HH	The difference between Market HH % and Retailer HH % that belong to a specific consumer segment profile based on meeting a specific demographic or psychographic parameter criteria.
Market Trading Area Spend %	The percentage of overall market spend produced by a specific consumer segment profile based on meeting a specific demographic or psychographic parameter criteria.
Retailer Trading Area Spend %	The percentage of overall market spend produced by a specific consumer segment profile based on meeting a specific demographic or psychographic parameter criteria while shopping at the retailer.

**Table 4–4 (Cont.) 1. Analyze Target Shoppers Measures**

Label	Definition
Retailer Spend Diff Market Spend	The difference in spend percentage between the market and the retailer. It is the difference between Market Spend % and Retailer Spend %.
Key Take Away	The user comments that can be saved for each task.

## 2. Analyze Trading Area Opportunity View

Use this view to see the analytics that identify whether or not target shoppers offer a good business opportunity by comparing selected metrics compared with the overall market averages and other consumer segments.

This view exists at the following levels:

- Consumer Segment, such as Gourmet Shoppers, Soccer Moms, and so on
- Trading Area

**Figure 4–9 2. Analyze Trading Area Opportunity View**

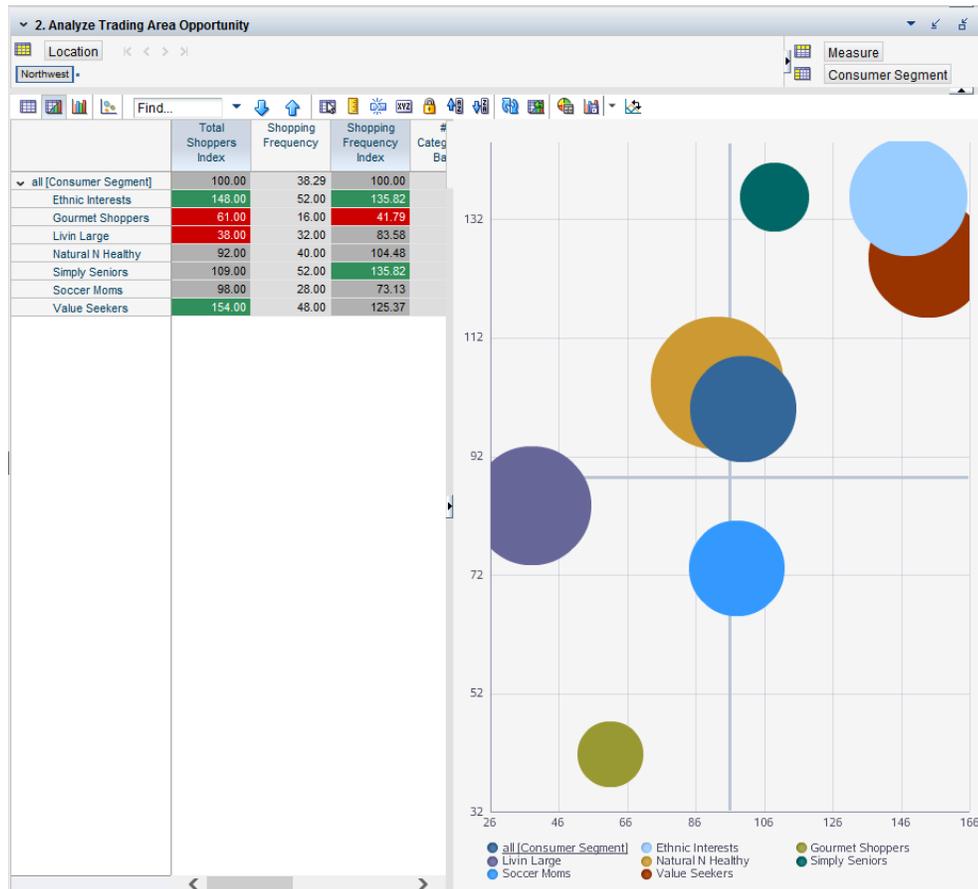


Table 4–5 lists the measures available in this view. The data is loaded from Household Panel data.

**Table 4–5 2. Analyze Trading Area Opportunity Measures**

<b>Label</b>	<b>Definition</b>
Total Shoppers Index	An index to assess a consumer segment's contribution to the overall sales volume at the retailer.
Shopping Frequency	The total number of shopping occasions of a consumer segment in a given time period (time-period as specified in the workbook build).
Shopping Frequency Index	An index value indicating the relative shopping frequency of a consumer segment compared with other consumer segments. This index is based on the shopping frequency values of different consumer segments and calculated using the index-to-average method.
# of Categories in Basket	The number of product categories with at least one item in a basket (customer's purchases or customer's basket). This measure is available at the trading area and consumer segment level.
# of Categories in Basket Index	An index value based on the # of Categories in Basket measure calculated using the index-to-average method, that is, the # of Categories in Basket divided by the average of # of Categories in Basket.
Avg. Basket Value	The average purchase value of a consumer for a particular consumer segment. The consumer's purchase is often referred to as consumer's basket.
Avg. Basket Value Index	An index indicating the relative size of a consumer segment's basket, or purchases, based on the average basket values of a consumer segment. It is calculated using the index-to-average method.
Key Take Away	The user comments that can be saved for each task.

### 3. 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:

- Retailer, presenting the retailer and its competitors
- Trading Area

**Figure 4–10 3. Analyze Competition View**

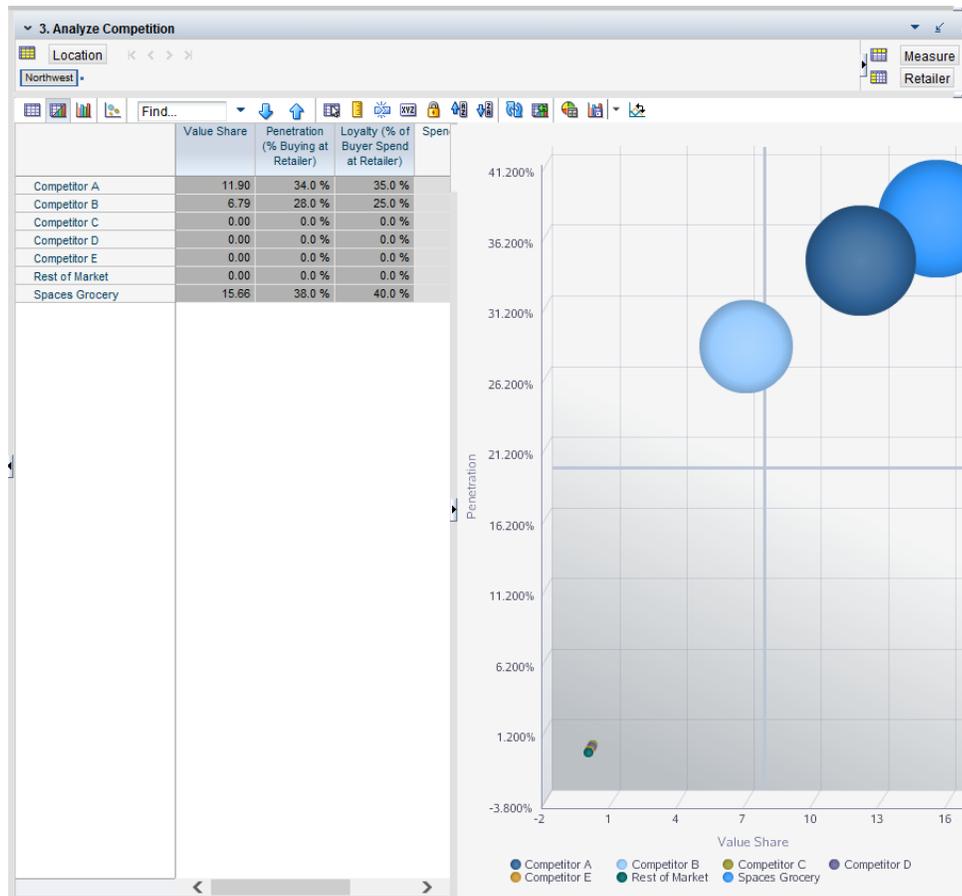


Table 4–6 lists the measures available in this view. The measures are loaded from Household Panel data.

**Table 4–6 3. 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 percentage of households buying at the retailer.
Loyalty (% of Buyer Spend at Retailer)	Category Planning Default Value Loyalty (% of Buyer Spend at Retailer) Percent. The percentage of the spending that retail buyers spend at the retailer.
Spend Index	An index value based on the spend percentage, of the consumers or market as a whole, attracted by the retailer compared to the average spend percentage at the other retailers competing in the market. It is calculated by the index-to-average method.
Key Take Away	The user comments that can be saved for each task.

## Assign Category Role Step

In a gamut of product categories, which the retailer stocks and sells, it is important to fix a role to each and every product category to clearly define and align with overall macro-retail business objectives set by the top management. This brings a sense of clarity, harmony, and synchronization among different product categories that are part of the retailer's portfolio. It helps the retailer in clearly defining and meeting business targets by defining appropriate assortments meeting consumer expectations. As previously described, category management is a practice to manage individual product categories as independent business units, but there is a certain role or a guideline to which each business unit needs to adhere to, which is brought in by the role assignment to categories. Category roles represent the importance and function of a product category in the overall category plan or in the larger scheme of things.

In the analogy presented, if a product category is an individual business unit, the category role is like a vision statement for the respective business unit. Similarly, strategies and tactics, which are assigned in the later part of the category planning process flow, are mission and goals to product categories and sub-categories. So, in effect, roles, strategies, and tactics to product categories are like the vision, mission, and goals for individual business units. Strategies suggest the overall approach to achieve the required category role. Tactics are a set of activities to attain the set strategy.

Assignment of roles, strategies, and tactics, fulfills the imminent need in a retail business, which is to orchestrate the whole business consisting of numerous product categories in a symphonic manner to maximize sales, profits, and produce optimum business results.

Roles, strategies and tactics along with category plan targets are shared with assortment planning and MSO tasks on approval. They are used as a reference or set of guidelines to make an assortment plan.

The retailer needs to view and analyze information from diverse sources, internal and external, and use that information to determine what role each category plays in the retailer's business so that the larger retail business objectives are met. 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. There are two industry models, Model A and Model B, used to assign roles to a category. Role assignment to a category also depends on the intent or overall game plan of the retailer to compete in the market, which is why, the user's (Category Manager's) discretion, is very important in the assignment of category roles.

This step initially presents market insights highlighting the market shares, growths, value shares, trends, and so on, cross-category consumer segment spend analysis, and internal cross-category performance analysis setting a stepping stone or background for category role assignments.

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:**
  1. Analyze Market Share and Growth View
  2. Analyze Sales Trends View
  3. Analyze Profit Contribution View
  4. Analyze Value Share View
- **Analyze Consumer Spend Tab:**
  5. Analyze Cross Category Spending View
  6. Analyze Spend Versus Frequency View
  7. Analyze Consumer Purchase Behavior View
  8. Analyze Category Buyer Conversion View
  9. 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:**
  1. Analyze Historic Performance - Industry Model A View
  2. Analyze Forecasted Performance - Industry Model A View
  3. Assign Category Roles - Industry Model A View
- **Analyze and Assign Category Role - Industry Model B Tab:**
  1. Analyze Historic Performance - Industry Model B View
  2. Analyze Forecasted Performance - Industry Model B View
  3. Assign Category Roles - Industry Model B View

## **Analyze Market Share and Growth Tab**

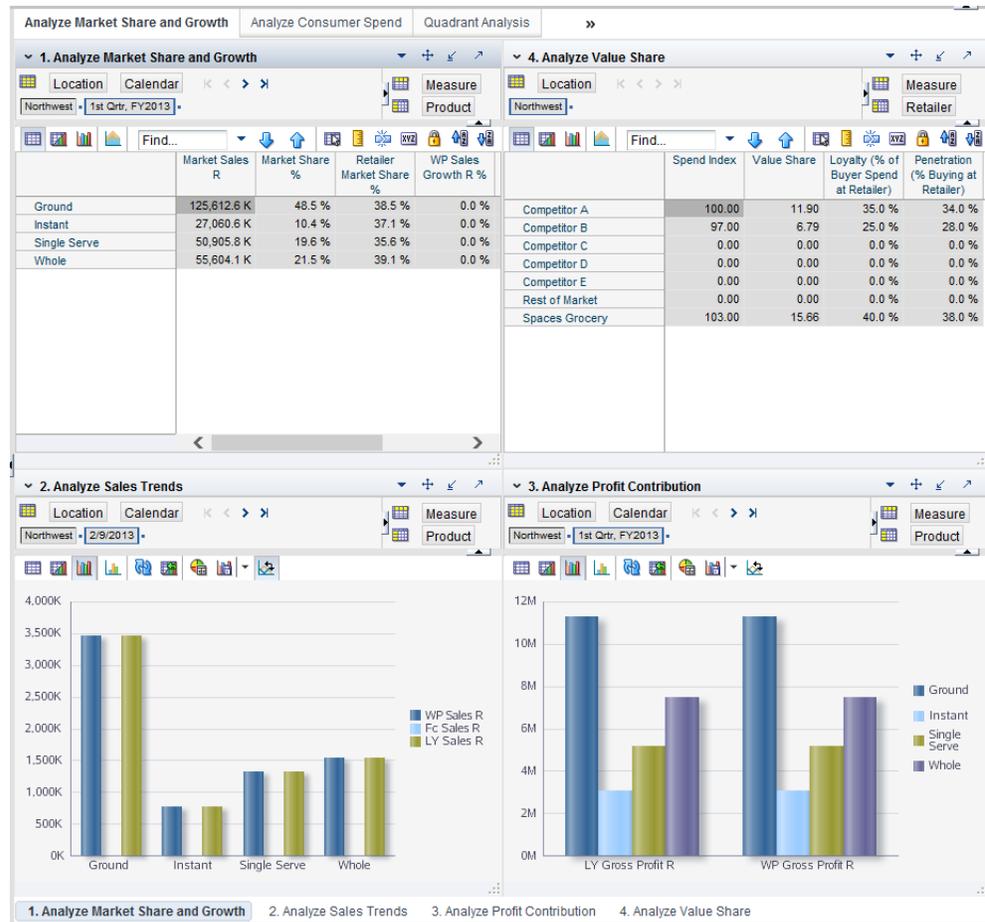
This tab presents a combined view of market insights and the retailer's standing in the market in terms of various business parameters. The analyses presented under this tab are mostly self-explanatory and elaborated upon, if required. This provides market business context information or highlights the business situation of the market for a product category. In effect, it builds the required market business background for the category manager to come out with a suitable and optimum category plan.

### **1. 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.

The following figure shows the four views for this tab.

**Figure 4–11 1. Analyze Market Share and Growth Tab Views**



This view exists at the following levels:

- Category
- Trading Area

**Figure 4–12 1. Analyze Market Share and Growth View (Market Measure Profile)**

	Market Sales R	Market Share %	Retailer Market Share %	WP Sales Growth R %	Market Inv Turn	Market Inv Turn Rank
Ground	125,612.6 K	48.5 %	38.5 %	0.0 %		
Instant	27,060.6 K	10.4 %	37.1 %	0.0 %		
Single Serve	50,905.8 K	19.6 %	35.6 %	0.0 %		
Whole	55,604.1 K	21.5 %	39.1 %	0.0 %		

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

**Table 4–7 1. Analyze Market Share and Growth Measures (Market Measure Profile)**

Label	Definition
Market Sales R	The sales retail value of the merchandise in the market, typically at the trading area level or above. This information is sourced from third parties providing syndicated data such as, Nielsen, IRI, and so on, on a quarterly basis.
Market Share %	The quantum or percentage of sales generated by a particular product or a product segment, such as a sub-category, towards the overall sales retail of the sub-category, category, and so on.
Retailer Market Share %	The retailer's sales retail value share of the overall market for a sub-category or a category.
WP Sales Growth R %	The working plan's sales retail's growth rate.
Market Inv Turn	<p>This measure reflects the market's (typically, trading area level or above) average inventory, taking into consideration all the retailers competing in the market. Inventory turns are defined as the number of times a retailer sells out its inventory at a location (for example a store, DC, a fulfillment center, and so on) in a given period of time. It represents the speed with which inventory is sold.</p> <p>Inventory Turns are calculated by dividing Sales by 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.</p>
Market Inv Turn Rank	An ordinal rank assigned to product segment (sub-category, category, and so on) on the basis of the Market Inv Turn measure.

**Figure 4–13 1. Analyze Market Share and Growth View (Retailer Measure Profile)**

	LY Sales R	Fc Sales R	WP Sales R	LY Gross Profit R	LY Gross Profit %	WP Gross Profit R	WP Gross Profit %
Ground	48,384.5 K	0.0 K	48,384.5 K	11,245.7 K	23.2 %	11,245.7 K	23.2 %
Instant	10,041.0 K	0.0 K	10,041.0 K	3,040.4 K	30.3 %	3,040.4 K	30.3 %
Single Serve	18,116.1 K	0.0 K	18,116.1 K	5,177.2 K	28.6 %	5,177.2 K	28.6 %
Whole	21,733.1 K	0.0 K	21,733.1 K	7,433.5 K	34.2 %	7,433.5 K	34.2 %

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

**Table 4–8 1. Analyze Market Share and Growth Measures (Retailer Measure Profile)**

Label	Definition
LY Sales R	Sales retail value, for a category or sub-category, per last year's actuals.
Fc Sales R	Forecasted sales retail value for a specific time period. It is generated in RCM by using Automated Exponential Smoothing (AutoES) libraries sourced from RDF. AutoES libraries are embedded in RCM. AutoES uses historic data to generate these forecasts. It can be scheduled periodically through batch jobs.
WP Sales R	Sales retail value, for a category or sub-category, in the working plan version of the category plan.

**Table 4–8 (Cont.) 1. Analyze Market Share and Growth Measures (Retailer Measure)**

Label	Definition
LY Gross Profit R	Last year's gross profit retail value (actuals) from the merchandise presented at the category and sub-category levels.
LY Gross Profit %	Last year's gross profit percentage from the merchandise presented at the category and sub-category levels.
WP Gross Profit R	The gross profit retail from the merchandise in the working plan version of the category plan.
WP Gross Profit %	The gross profit percentage from the merchandise in the working plan version of the category plan.

## 2. 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:

- Week
- Sub-Category
- Trading Area

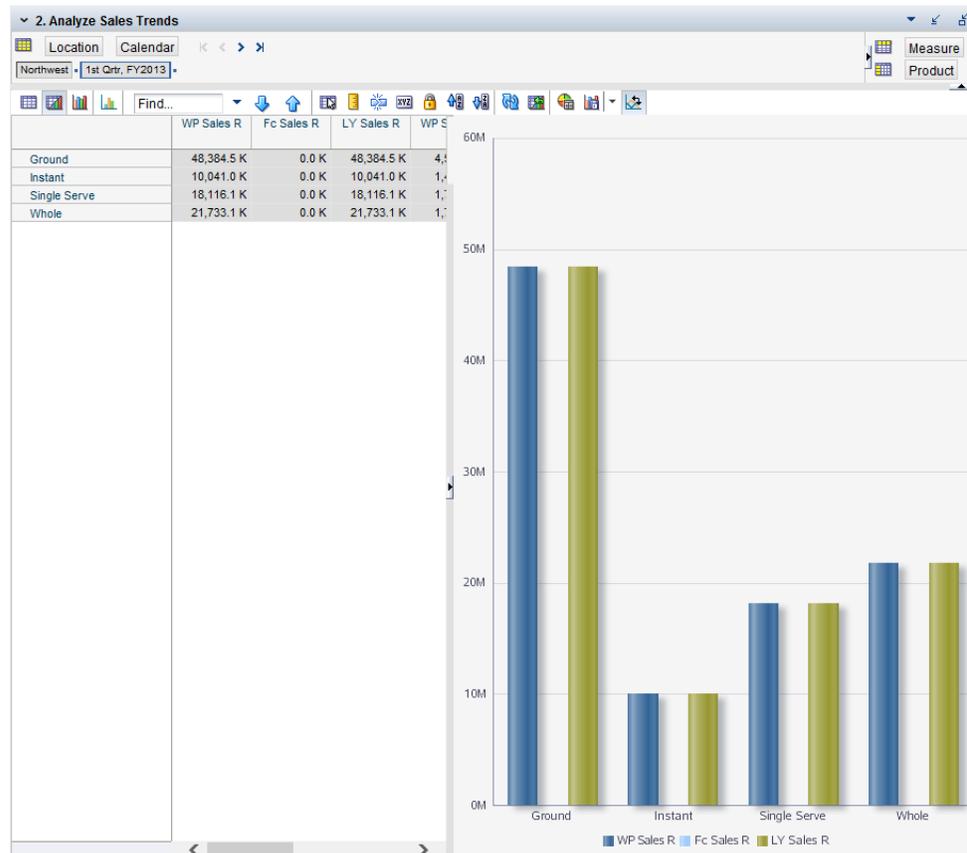
**Figure 4–14 2. Analyze Sales Trends View**

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

**Table 4–9 2. Analyze Sales Trends Measures**

Label	Definition
WP Sales R	Sales retail value, for a category or sub-category, per last year's actuals.
Fc Sales R	Forecasted sales retail value for a specific time period. It is generated in RCM by using AutoES libraries sourced from RDF. AutoES libraries are embedded in RCM. AutoES uses historic data to generate these forecasts. It can be scheduled periodically through batch jobs.
LY Sales R	The sales units from the merchandise in the working plan version of the category plan.
WP Sales U	The working plan assortment's sales units.
Fc Sales U	Forecasted sales retail units for a specific time period. It is generated in RCM by using AutoES libraries sourced from RDF. AutoES libraries are embedded in RCM. AutoES uses historic data to generate these forecasts. It can be scheduled periodically through batch jobs.
LY Sales U	Sales retail value, for a category or sub-category, per last year's actuals.
WP Sales var to Fc U	Variation of sales units in the working plan version of the category plan to the same in the forecast.
WP Sales var to LY U	Variation of sales units in the working plan version of the category plan to the same in last year's actuals.

### 3. Analyze Profit Contribution View

Use this view to determine how each sub-category contributes to the overall margin and profit of the category. This information is best viewed as a scatter chart.

This view exists at the following levels:

- Trading Area
- Sub-Category
- Quarter

**Figure 4–15 3. Analyze Profit Contribution View**

	LY Gross Profit R	LY Gross Profit %	WP Gross Profit R	WP Gross Profit %
Ground	11,245.7 K	23.2 %	11,245.7 K	23.2 %
Instant	3,040.4 K	30.3 %	3,040.4 K	30.3 %
Single Serve	5,177.2 K	28.6 %	5,177.2 K	28.6 %
Whole	7,433.5 K	34.2 %	7,433.5 K	34.2 %

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

**Table 4–10 3. Analyze Profit Contribution Measures**

Label	Definition
LY Gross Profit R	Last year's gross profit retail value (actuals) from the merchandise.
LY Gross Profit %	Last year's gross profit percentage from the merchandise.
WP Gross Profit R	The gross profit retail value from the merchandise in the working plan version of the category plan.
WP Gross Profit %	The gross profit percentage from the merchandise in the working plan version of the category plan.

#### 4. Analyze Value Share View

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

**Figure 4–16 4. Analyze Value Share View**

	Spend Index	Value Share	Loyalty (% of Buyer Spend at Retailer)	Penetration (% Buying at Retailer)
Competitor A	100.00	11.90	35.0 %	34.0 %
Competitor B	97.00	6.79	25.0 %	28.0 %
Competitor C	0.00	0.00	0.0 %	0.0 %
Competitor D	0.00	0.00	0.0 %	0.0 %
Competitor E	0.00	0.00	0.0 %	0.0 %
Rest of Market	0.00	0.00	0.0 %	0.0 %
Spaces Grocery	103.00	15.66	40.0 %	38.0 %

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

**Table 4–11 4. Analyze Value Share Measures**

Label	Definition
Spend Index	An index value based on the spend percentage of the consumers attracted by the retailer compared to the average spend percentage at the other retailers competing in the market. It is calculated by the index-to-average method.
Value Share	Value share of the retailer is calculated using the formula: (Penetration) multiplied by (Loyalty Index) multiplied by (Spending Index).

**Table 4–11 (Cont.) 4. Analyze Value Share Measures**

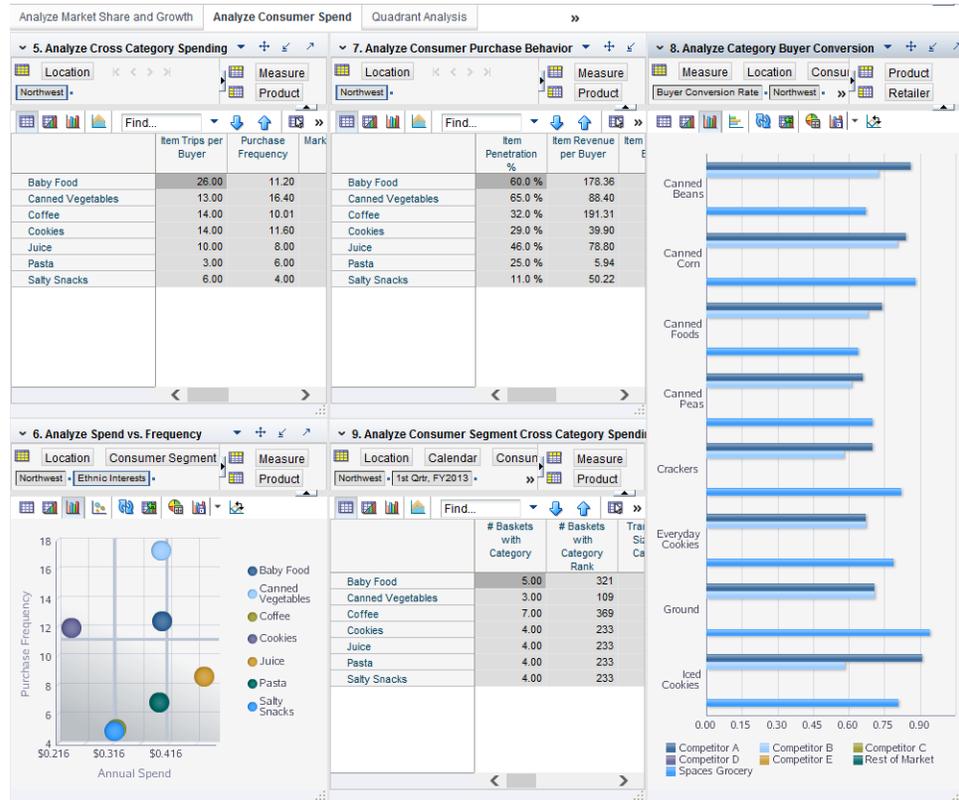
Label	Definition
Loyalty (% of Buyer Spend at Retailer)%	<p>Category Planning Default Value Loyalty (% of Buyer Spend at Retailer) Percent. The share of annual category requirements that the consumer is able to satisfy with a single brand (size, type, flavor, and so on). For example, if a consumer makes 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.</p> <p>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).</p>
Penetration (% Buying at Retailer)	The percent of households buying at the retailer.

### Analyze Consumer Spend Tab

This tab presents cross-category consumer spend analysis at different levels including the overall market level, retailer level, and competitor level. Consumer spend metrics consist of parameters such as Purchase Frequency, Item Penetration, Annual Spend, and so on. It helps the retailer assessing the consumer spending patterns and identifying its target consumer segments.

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

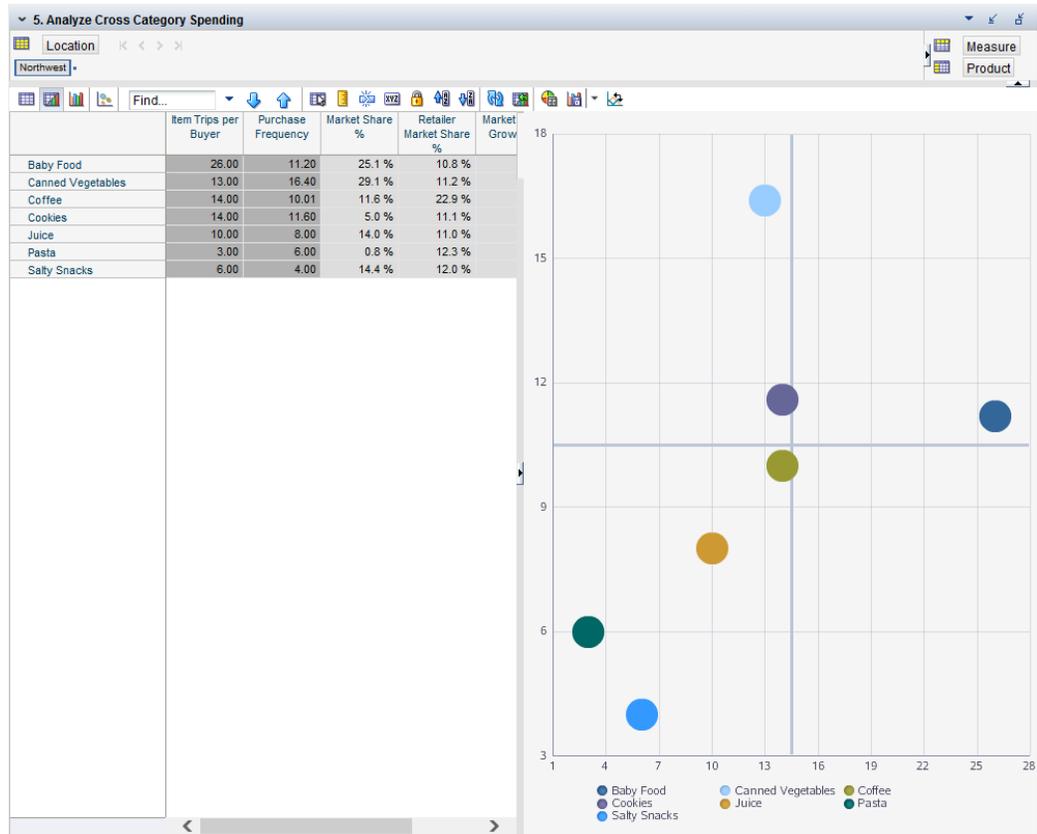
Figure 4–17 Analyze Consumer Spend Tab Views



### 5. 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 5. Analyze Cross Category Spending View**



The view exists at the following levels:

- Trading Area
- Category

Table 4–12 lists the measures available in this view. The measures are loaded from Household Panel data.

**Table 4–12 5. Analyze Cross Category Spending Measures**

Label	Definition
Item Trips per Buyer	The average number of times a customer makes a shopping trip for a particular item or a set of merchandise.
Purchase Frequency	The total number of times an item or merchandise from a particular product group is purchased in a given time period. It is also looked at consumer segment-wise.
Market Share %	The quantum or percentage of sales generated by a particular product or a product segment, such as a sub-category, towards the overall sales retail of the sub-category, category, and so on.
Retailer Market Share %	The retailer's sales retail value share of the overall market for a sub-category or category.
Market Sales Growth %	The percentage increase or decrease in sales retail volume for the entire market compared to the previous time period.
Item Revenue per Buyer	An item's average retail sales per customer, buyer, or shopper.

## 6. 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
- Trading Area
- Category

**Figure 4–19 6. Analyze Spend vs. Frequency View**

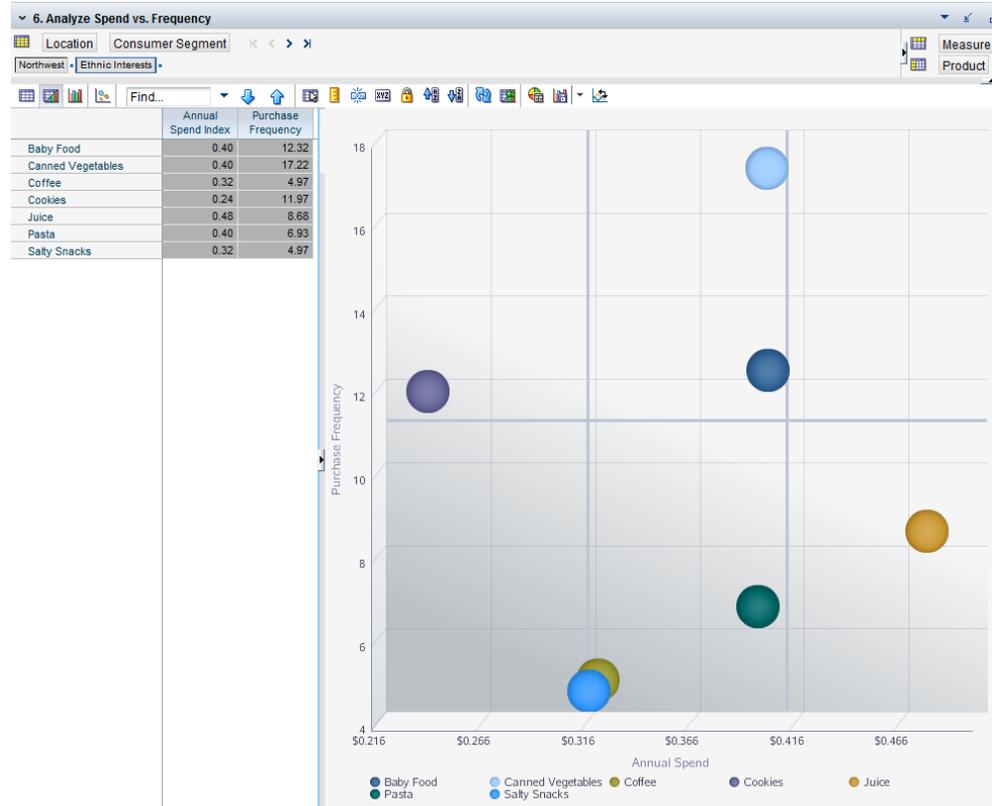


Table 4–13 lists the measures available in this view. The measures are loaded from market scan and retailer data.

**Table 4–13 6. Analyze Spend Vs. Frequency Measures**

Label	Definition
Annual Spend Index	An index indicating the average annual spend on a product category relative to other product categories. It is calculated by an index-to-average method using the spends for different product categories. This measure is presented at the consumer segment level.
Purchase Frequency	The total number of times an item or merchandise from a particular product group is purchased in a given time period. It is also looked at consumer segment-wise.

## 7. Analyze Consumer Purchase Behavior View

Use this view to analyze consumer purchase behavior across categories.

This view exists at the following levels:

- Category
- Consumer Segment

**Figure 4–20 7. Analyze Consumer Purchase Behavior**

	Item Penetration %	Item Revenue per Buyer	Item Trips per Buyer	Item Spend per Item per Trip	Item Spend on Promotion %
Baby Food	60.0 %	178.36	26.00	6.86	10.0 %
Canned Vegetables	65.0 %	88.40	13.00	6.80	10.0 %
Coffee	32.0 %	191.31	14.00	13.67	30.0 %
Cookies	29.0 %	39.90	14.00	2.85	14.0 %
Juice	46.0 %	78.80	10.00	7.88	10.0 %
Pasta	25.0 %	5.94	3.00	1.98	20.0 %
Salty Snacks	11.0 %	50.22	6.00	8.37	0.0 %

Table 4–14 lists the measures available in this view.

**Table 4–14 7. Analyze Consumer Purchase Behavior Measures**

Label	Definition
Item Penetration %	The percentage of households from a specific market/region/trading area that purchased an item or an item from a product group at least once within a given time frame.
Item Revenue per Buyer	An item's average retail sales per customer, buyer, or shopper.
Item Trips per Buyer	The average number of times a customer makes a shopping trip for a particular item or a set of merchandise.
Item Spend per Item per Trip	An item's retail sales value per customer's trip.
Item Spend on Promotion %	An item's promotional sales share of the overall retail sales.

## 8. 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 8. Analyze Category Buyer Conversion View**

	Canned Beans	Canned Corn	Canned Foods	Canned Peas	Crackers	Everyday Cookies	Ground	Iced Cookies	Instant	Lasagna
Competitor A	86.0 %	84.0 %	74.0 %	66.0 %	70.0 %	67.0 %	71.0 %	91.0 %	73.0 %	92.0 %
Competitor B	72.3 %	80.6 %	67.9 %	61.3 %	57.9 %	67.1 %	71.0 %	58.2 %	64.0 %	72.0 %
Competitor C	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Competitor D	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Competitor E	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Rest of Market	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Spaces Grocery	67.0 %	88.0 %	64.0 %	70.0 %	82.0 %	79.0 %	94.3 %	81.0 %	94.0 %	78.0 %

This view exists at the following levels:

- Category
- Retailer, presenting the retailer and its competitors
- Consumer Segment
- Trading Area

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

**Table 4–15 8. Analyze Category Buyer Conversion Measure**

Label	Definition
Buyer Conversion Rate	Percentage of shoppers who buy an item from a sub-category or category, out of the total shoppers who shop at the store or the retailer.

### 9. 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
- Trading Area
- Quarter
- Consumer Segment

**Figure 4–22 9. Analyze Consumer Segment Cross Category Spending View**

	# Baskets with Category	# Baskets with Category Rank	Transaction Size with Category	Transaction Size with Category Rank	Annual Spend Index	Annual Spend Index Rank	Purchase Frequency	Purchase Frequency Rank
Baby Food	5.00	321	3.75	361	0.05	297	12.32	305
Canned Vegetables	3.00	109	3.51	265	0.05	297	17.22	377
Coffee	7.00	369	3.73	345	0.04	193	4.97	57
Cookies	4.00	233	2.05	41	0.03	65	11.97	281
Juice	4.00	233	3.87	385	0.06	377	8.68	169
Pasta	4.00	233	3.75	361	0.05	297	6.93	121
Salty Snacks	4.00	233	3.31	177	0.04	193	4.97	57

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

**Table 4–16 9. Analyze Consumer Segment Cross Category Spending Measures**

Label	Definition
# Baskets with Category	The number of baskets (customer purchases or customer baskets) that contain at least one item from the product category. This measure is available at the consumer segment level.
# Baskets with Category Rank	An ordinal rank (sequential rank) assigned to a product category based in the # Baskets with Category measure.

**Table 4–16 (Cont.) 9. Analyze Consumer Segment Cross Category Spending Measures**

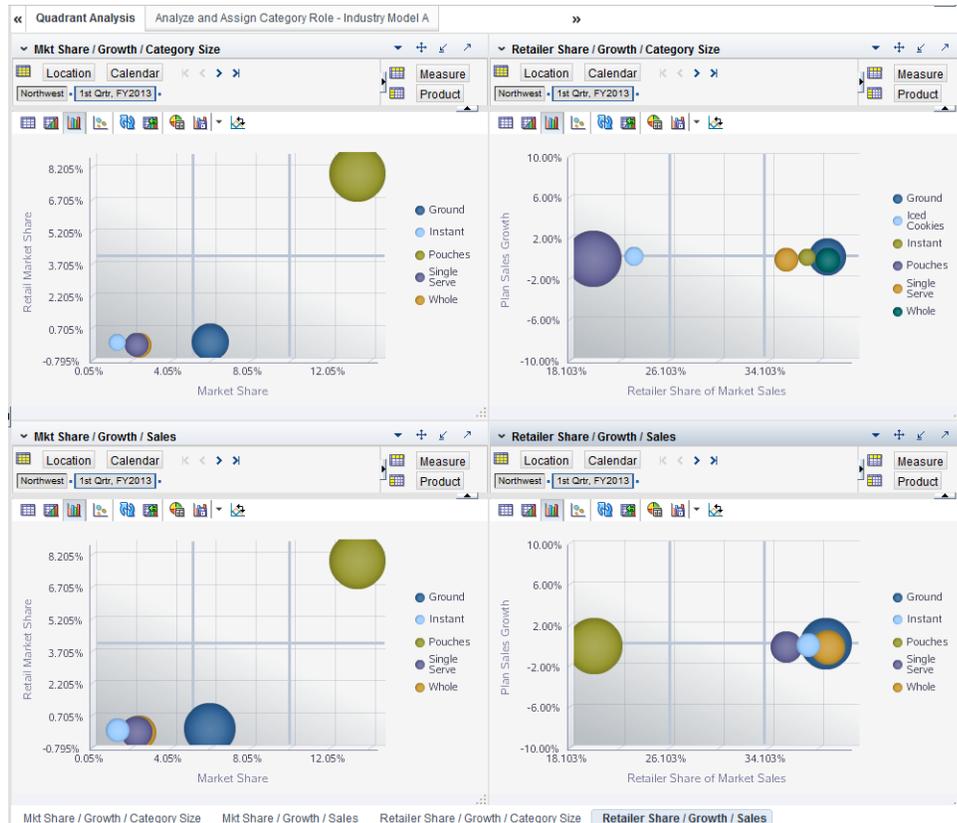
Label	Definition
Transaction Size with Category	The average basket share value for a particular product category in a customer's basket.
Transaction Size with Category Rank	An ordinal rank based on the Transaction Size with Category for a category relative to other product categories.
Annual Spend Index	An index indicating the average annual spend on a product category relative to other product categories. It is calculated by an index-to-average method using the spends for different product categories. This measure is presented at the consumer segment level.
Annual Spend Index Rank	An ordinal rank (sequential rank) assigned to a product category based on the Annual Spend Index measure.
Purchase Frequency	The total number of times an item or merchandise from a particular product group is purchased in a given time period. It is also looked at consumer segment-wise.
Purchase Frequency Rank	An ordinal rank based on the purchase frequency.

## Quadrant Analysis Tab

Quadrant Analysis, under this step, presents cross-category quantitative performance analysis of the retailer compared the overall market. It provides quick snapshot views of the retailer's standing compared the market for a category.

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**

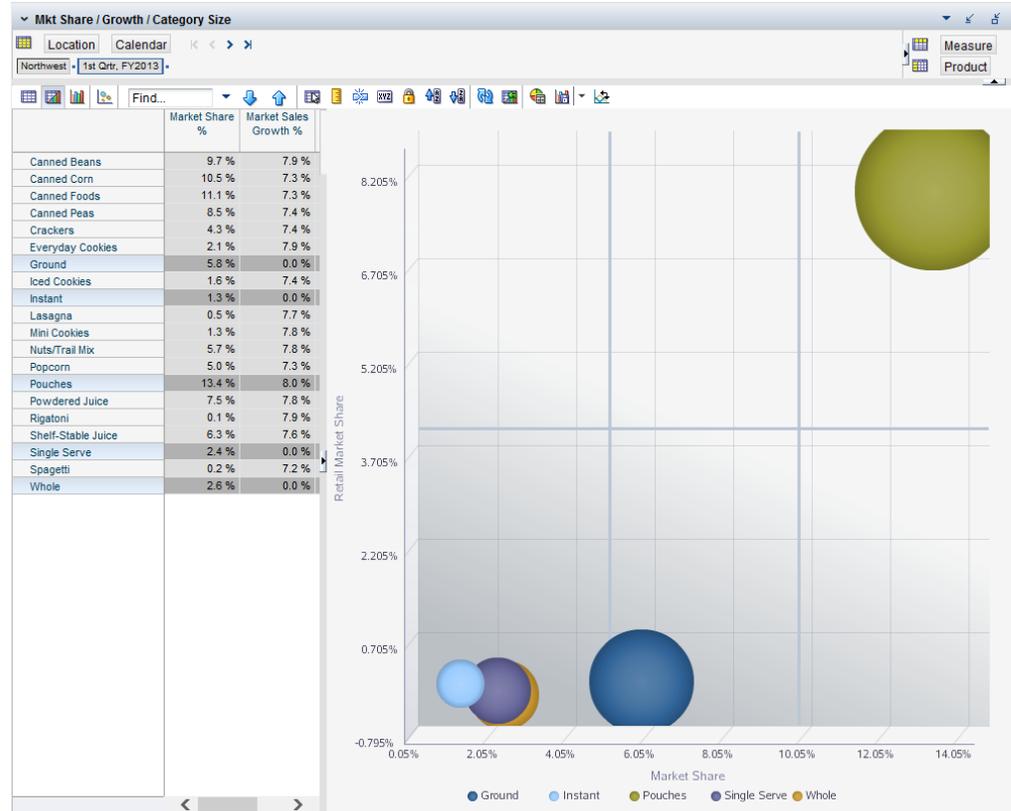


Table 4–17 lists the measure available in this view. The measure is loaded from market scan and retailer data.

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

Label	Definition
Market Share %	The quantum or percentage of sales generated by a particular product or a product segment, such as a sub-category, towards the overall sales retail of the sub-category, category, and so on.
Market Share Growth %	The rate at which the market sales revenue is growing for a sub-category or category.
Market Sales R	The sales retail value of the merchandise in the market, typically at the trading area level or above. This information is sourced from third parties providing syndicated data such as, Nielsen, IRI, and so on, on a quarterly basis.

## 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**

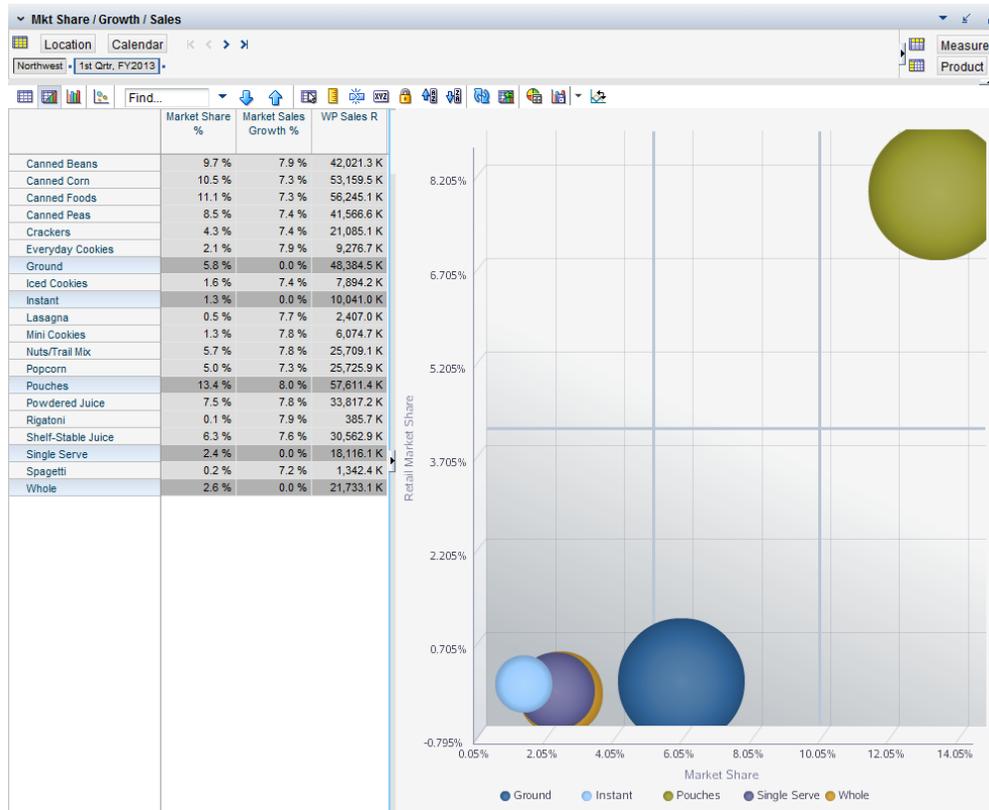


Table 4–18 lists the measures available in this view. The measures are loaded from market scan and retailer data.

**Table 4–18 Mkt Share / Growth / Sales Measures**

Label	Definition
Market Share %	The quantum or percentage of sales generated by a particular product or a product segment, such as a sub-category, towards the overall sales retail of the sub-category, category, and so on.
Retailer Market Share %	The retailer's sales retail value share of the overall market for a sub-category or category.
WP Sales R	The working plan assortment's sales retail value.

**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.

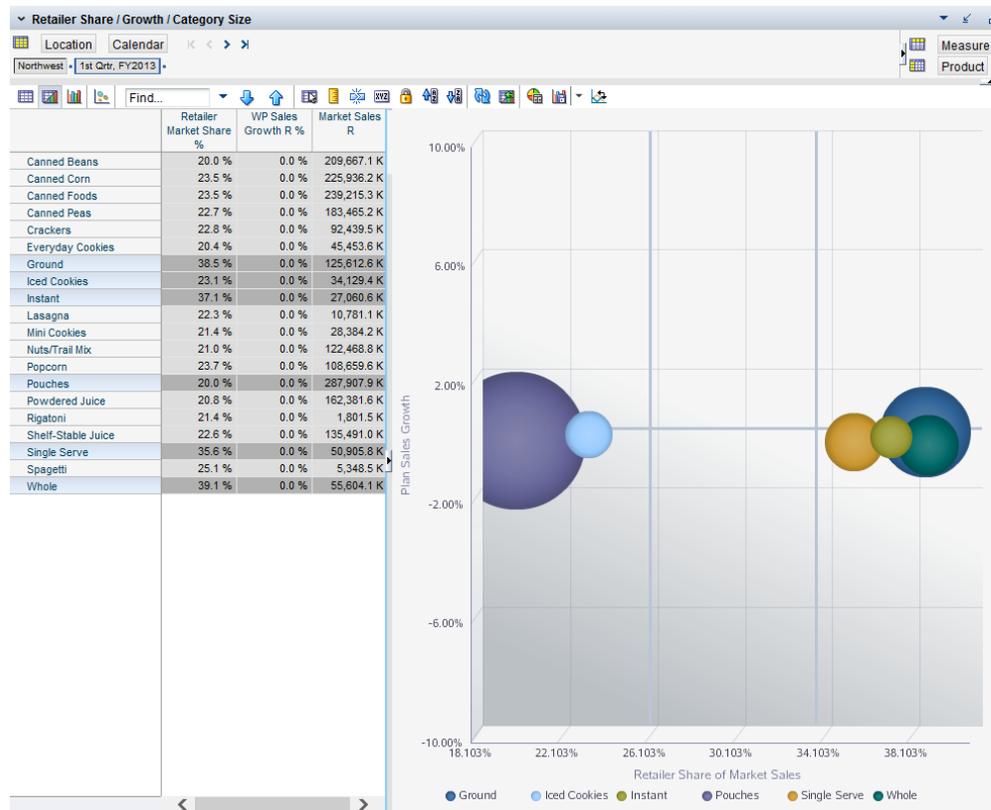
**Figure 4–26 Retailer Share / Growth / Category Size View**

Table 4–19 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 Market Share %	The retailer's sales retail value share of the overall market for a sub-category or category.
WP Sales Growth R%	The working plan's sales retail's growth rate.
Market Sales R	The sales retail value of the merchandise in the market, typically at the trading area level or above. This information is sourced from third parties providing syndicated data such as, Nielsen, IRI, and so on, on a quarterly basis.

### 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**

	Retailer Market Share %	WP Sales Growth R %	WP Sales R
Canned Beans	20.0 %	0.0 %	42,021.3 K
Canned Corn	23.5 %	0.0 %	53,159.5 K
Canned Foods	23.5 %	0.0 %	56,245.1 K
Canned Peas	22.7 %	0.0 %	41,566.6 K
Crackers	22.8 %	0.0 %	21,085.1 K
Everyday Cookies	20.4 %	0.0 %	9,276.7 K
Ground	38.5 %	0.0 %	48,384.5 K
Iced Cookies	23.1 %	0.0 %	7,894.2 K
Instant	37.1 %	0.0 %	10,041.0 K
Lasagna	22.3 %	0.0 %	2,407.0 K
Mini Cookies	21.4 %	0.0 %	6,074.7 K
Nuts/Trail Mix	21.0 %	0.0 %	25,709.1 K
Popcorn	23.7 %	0.0 %	25,725.9 K
Pouches	20.0 %	0.0 %	57,611.4 K
Powdered Juice	20.8 %	0.0 %	33,817.2 K
Rigatoni	21.4 %	0.0 %	385.7 K
Shelf-Stable Juice	22.6 %	0.0 %	30,562.9 K
Single Serve	35.6 %	0.0 %	18,116.1 K
Spaghetti	25.1 %	0.0 %	1,342.4 K
Whole	39.1 %	0.0 %	21,733.1 K

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
Retailer Market Share %	The retailer's sales retail value share of the overall market for a sub-category or category.
WP Sales Growth R%	The working plan's sales retail's growth rate.
WP Sales R	Sales retail value, for a category or sub-category, in the working plan version of the category plan.

## Analyze and Assign Category Role - Industry Model A Tab

Roles are assigned at the category level in the product hierarchy. Category roles represent the importance and function of a product category in the overall category plan or in the larger scheme of things.

Use this tab to analyze and assign the role of each category based on different Category Management frameworks and capabilities. There are two industry models available as part of the base GA solution. These industry models draw from industry standard best practices. However, it is possible to configure or customize the framework to meet your individual currently used best practice, 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, assign, and approve category roles.

This tab presents Model A for category role assignment. Model A assigns a role to categories from a consumer perception of a category's importance in the retailer's portfolio of categories' perspective. The consumer perception being referred to does not look at individual consumer segment level perceptions, rather it looks at all the

consumer segment levels. In other words, there is no consumer segment dimension available here.

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) versus 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 position 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:

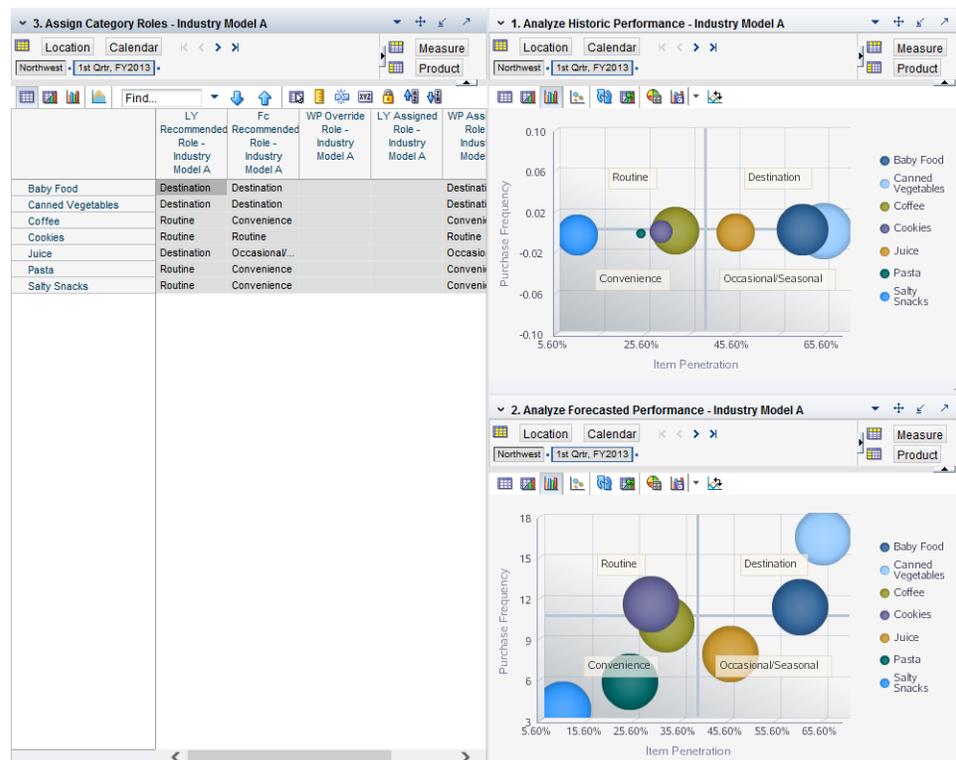
- Retailer's POS data
- Retailer's forecast data
- Household Panel data

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

- Destination
- Routine
- Occasional / Seasonal
- Convenience

Figure 4–28 shows the views for this tab.

**Figure 4–28 Analyze and Assign Category Roles - Industry Model A Tab Views**



### 1. Analyze Historic Performance - Industry Model A View

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

- Destination: Destination categories are identified by their high penetration and purchase frequency and large sales revenue. The objective is to be the primary category provider and help define the retailer as the store of choice by delivering consistent value, superior target consumer value.
- Routine: Routine categories have medium-high penetration and purchase frequency and medium sales revenue. The objective of routine category is to be one of the preferred category providers and help develop the retailer as the store of choice by delivering consistent, competitive target consumer value.
- Seasonal: Seasonal category's objective is to be a major category provider and help reinforce the retailer as the store of choice by delivering frequent, competitive target consumer value.
- Convenience: Convenience categories are represented by average low penetration, purchase frequency, and low sales revenue. The goal of such a category is to be a category provider and help reinforce the retailer as the full-service store of choice by delivering good target consumer value.

This information is best viewed as a bubble chart.

**Figure 4–29 1. Analyze Historic Performance Role - Industry Model A View**

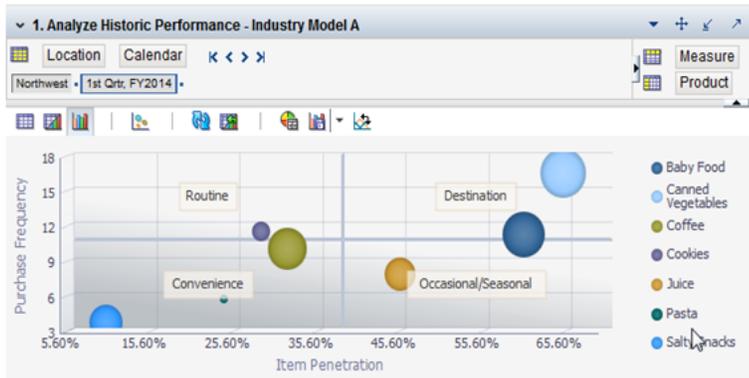


Table 4–21 lists the measures available in this view. The measures are loaded from market scan and retailer data.

**Table 4–21 1. Analyze Historic Performance - Industry Model A Measures**

Label	Definition
LY Item Penetration %	The percentage of households from a specific market (typically at the trading area level or above) that purchased an item or an item from a product group at least once in last year's assortment.
LY Purchase Frequency	The total number of times an item or merchandise from a particular product group (sub-category, category, and so on) is purchased in a given time period in last year sales. It is also looked at consumer segment-wise.
LY Sales R	Sales retail value, for a category or sub-category, per last year's actuals.

## 2. Analyze Forecasted Performance - Industry Model A View

Use this view to analyze forecasted performance for determining category roles. Similar to the Analyze Historic Performance - Industry Model A view, this view plots the charts based on forecasted values for item penetration percentage, purchase frequency, and sales retail value.

This view exists at the following levels:

- Trading Area
- Consumer Segment
- Category

**Figure 4–30 2. Analyze Forecasted Performance - Industry Model A View**

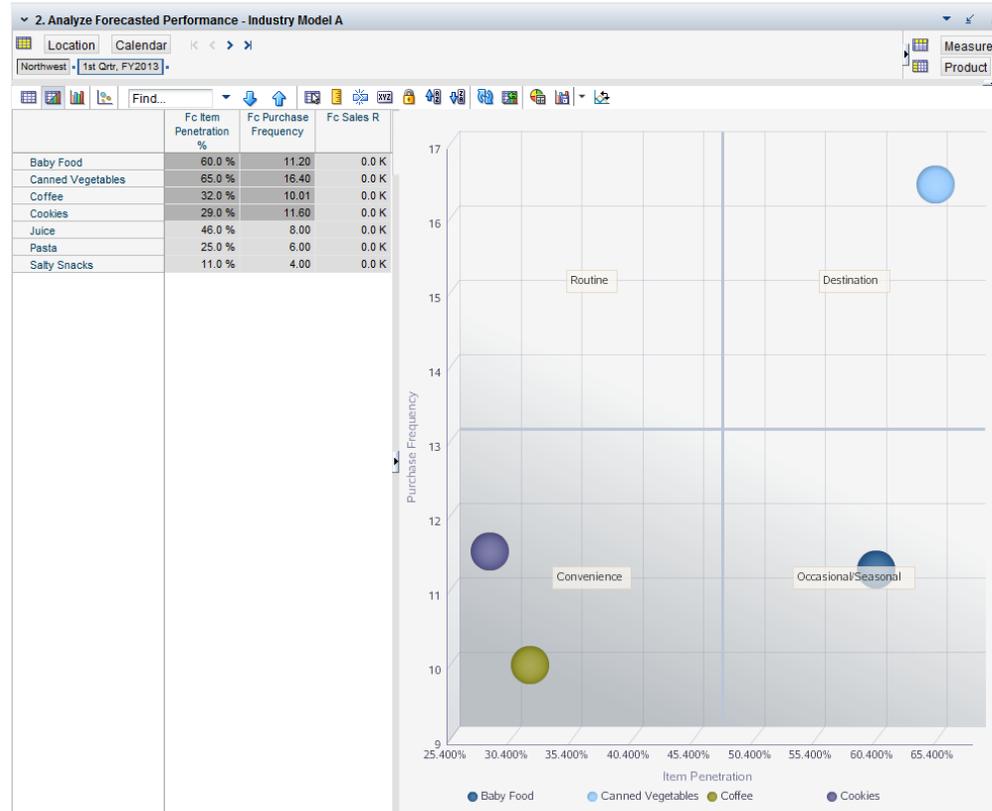


Table 4–22 lists the measures available in this view. The measures are loaded from market scan and retailer data.

**Table 4–22 2. Analyze Forecasted Performance - Industry Model A Measures**

Label	Definition
Fc Item Penetration %	The percentage of households from a specific market/region/trading area that purchased an item or an item from a product group at least once per the forecast. This measure is sourced from a third party, such as Nielsen, or some external system and loaded into RCM.

**Table 4–22 (Cont.) 2. Analyze Forecasted Performance - Industry Model A Measures**

Label	Definition
Fc Purchase Frequency	The total number of times an item or merchandise from a particular product group is purchased in a given time period per the forecast. It is also looked at consumer segment-wise. This measure is sourced from a third party, such as Nielsen, or some external system and loaded into RCM.
Fc Sales R	Forecasted sales retail value for a specific time period. It is generated in RCM by using AutoES libraries sourced from RDF. AutoES libraries are embedded in RCM. AutoES uses historic data to generate these forecasts. It can be scheduled periodically through batch jobs.

### 3. 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
- Trading Area
- Quarter

**Figure 4–31 3. Assign Category Roles - Industry Model A View**

	LY Recommended Role - Industry Model A	Fc Recommended Role - Industry Model A	WP Override Role - Industry Model A	LY Assigned Role - Industry Model A	WP Assigned Role - Industry Model A	OP Assigned Role - Industry Model A
Baby Food	Destination	Destination			Destination	
Canned Vegetables	Destination	Destination	Destination		Destination	
Coffee	Convenience	Destination			Destination	Destination
Cookies	Routine	Destination			Destination	
Juice	Occasional/...	Destination			Destination	
Pasta	Convenience	Destination			Destination	
Salty Snacks	Convenience	Destination			Destination	

Table 4–23 lists the measures available in this view.

**Table 4–23 3. Assign Category Roles - Industry Model A Measures**

Label	Definition
LY Recommended Role - Industry Model A	The role recommended to a category per Industry Model A using last year's actuals for the respective measures. The assignment happens on the basis of the definition of roles previously described.
Fc Recommended Role - Industry Model A	The role recommended to a category per Industry Model A based on the forecasted data for the respective measures. The assignment happens on the basis of definition of roles described previously described.

**Table 4–23 (Cont.) 3. Assign Category Roles - Industry Model A Measures**

<b>Label</b>	<b>Definition</b>
WP Override Role - Industry Model A	This measure provides a facility to override the system-recommended role per Industry Model A in the working plan version of the category plan. It has a drop-down list containing a pick list of roles.
LY Assigned Role - Industry Model A	The role assigned to a category per Industry Model A in last year's category plan.
WP Assigned Role - Industry Model A	The final role assigned to a category per Industry Model A in the working plan version of the category plan.
OP Assigned Role - Industry Model A	The final role assigned to the category per Industry Model A in the approved working plan version of the category plan, known as the original plan.

### Analyze and Assign Category Role - Industry Model B Tab

Industry Model B looks at the business generated by a product category from a retailer's point of view trying to assess the relative importance of a product category in the retailer's portfolio of categories. The data required for this analysis comes from the retailer's POS data aggregated to the category level on 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 a forecasting application (such as RDF) or historic data (actuals) in the form of LY data.

The following data is required:

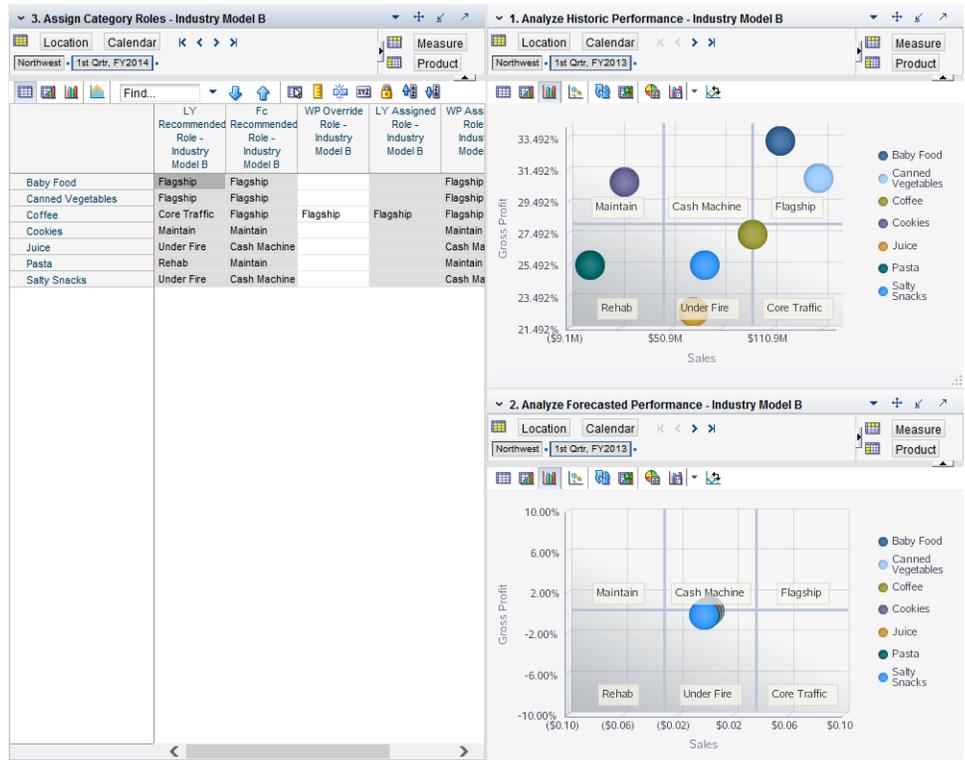
- Retailer's POS data
- Retailer's forecast data

Category roles defined using Industry Model B:

- **Flagship:** Flagship categories are identified by their high sales and high gross margin. The objective of such categories is to increase sales/maintain margin or maintain sales and increase margin.
- **Cash Machine:** Cash Machine categories are represented by high sales and medium gross margin. The objective is to increase sales and maintain profits or maintain sales/increase profits.
- **Maintain:** Maintain categories are identified by low sales and high gross margin. The goal is to maintain sales and profits or increase sales and maintain profits.
- **Core Traffic:** Core Traffic categories are represented by high sales and low gross margin. The target is to decrease sales and increase profits or maintain sales and profits.
- **Under Fire:** Under Fire categories have medium sales and low gross margin. The objective is to decrease sales and increase profits or maintain sales and increase profits of such categories.
- **Rehab:** Rehab categories are characterized by low sales and low gross margin the goal is to decrease sales and increase profits.

Figure 4–32 shows the views for this tab.

**Figure 4–32 Analyze and Assign Category Role - Industry Model B Tab Views**



**1. Analyze Historic Performance - Industry Model B View**

Use this view to analyze and determine category roles based on historic performance of the categories. The coordinates of a category in the chart form the basis of the assignment of roles to categories. Six roles are assigned using Industry Model B: Flagship, Cash Machine, Maintain, Core Traffic, Under Fire, and Rehab. This information is best viewed as a bubble chart.

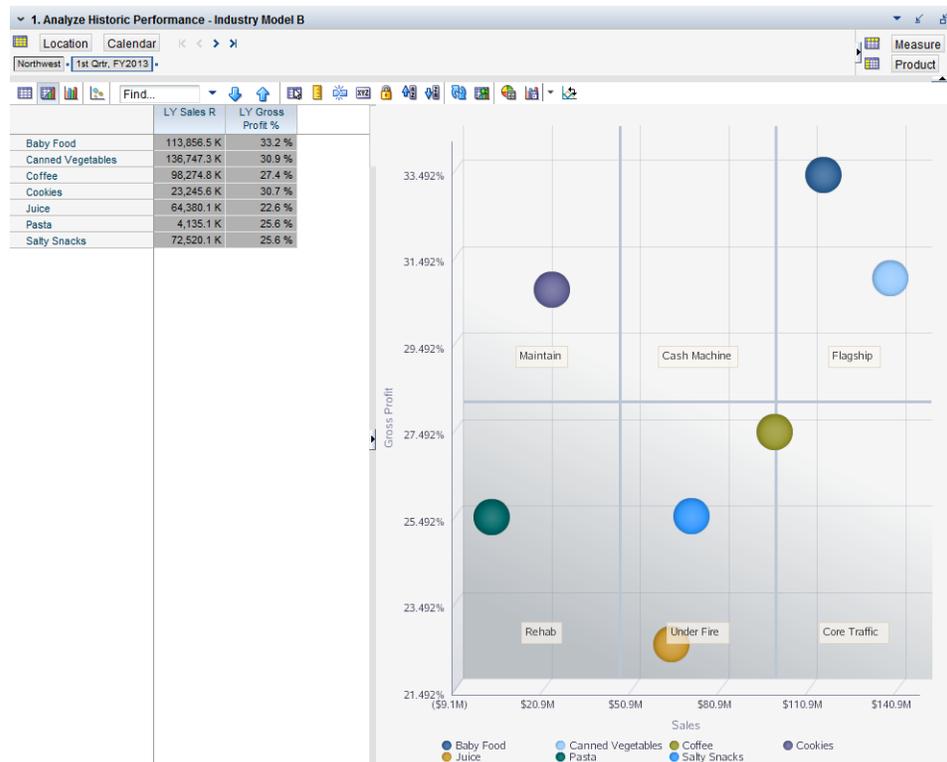
**Figure 4–33 1. Analyze Historic Performance Role - Industry Model B View**

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

**Table 4–24 1. Analyze Historic Performance - Industry Model B Measures**

Label	Definition
LY Sales R	Sales retail value, for a category or sub-category, per last year's actuals.
LY Gross Profit %	The gross profit percentage from the merchandise in last year's assortment. This measure is different than the LY Assort Gross Profit % measure as it reflects gross profit percentage for all items irrespective of whether or not these items are part of last year's assortment.

## 2. Analyze Forecasted Performance - Industry Model B View

Use this view to analyze forecasted performance for determining category roles. Similar to the Analyze Historic Performance - Industry Model B view, this view provides a facility to determine the roles for a category per Industry Model B based on forecasted data for the respective measures. The coordinates of a category in the chart form the basis of assignment of roles to categories. Six roles are assigned using Industry Model B: Flagship, Cash Machine, Maintain, Core Traffic, Under Fire, and Rehab.

This view exists at the following levels:

- Trading Area
- Consumer Segment
- Category

**Figure 4–34 2. Analyze Forecasted Performance - Industry Model B View**

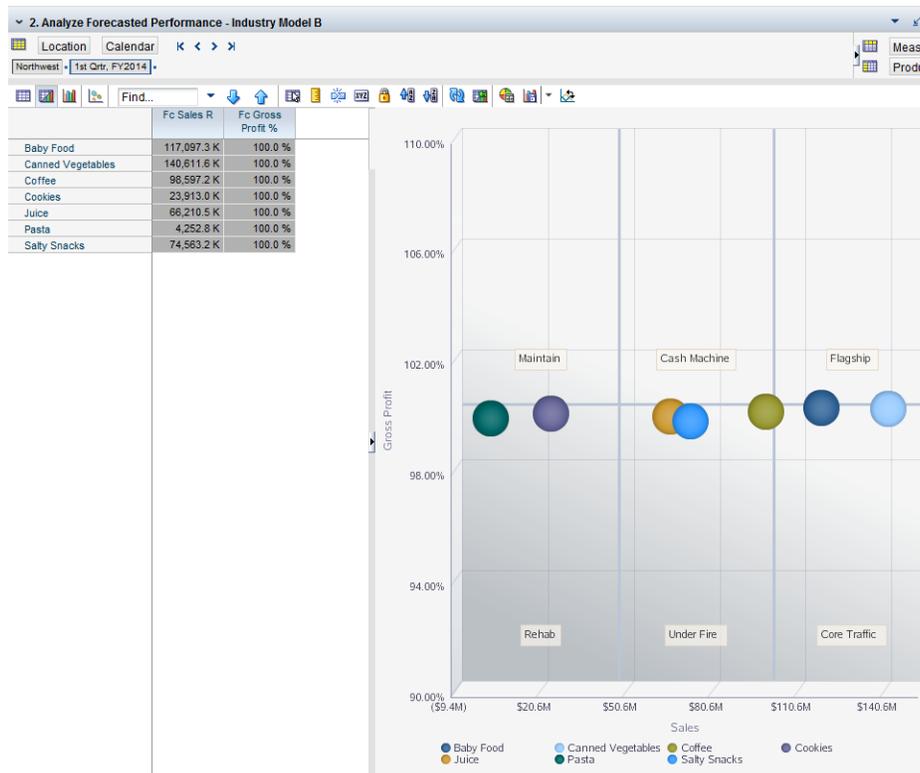


Table 4–25 lists the measures available in this view. The measures are loaded from market scan and retailer data.

**Table 4–25 2. Analyze Forecasted Performance - Industry Model B Measures**

Label	Definition
Fc Sales R	Forecasted sales retail value for a specific time period. It is generated in RCM by using AutoES libraries sourced from RDF. AutoES libraries are embedded in RCM. AutoES uses historic data to generate these forecasts. It can be scheduled periodically through batch jobs.
Fc Gross Profit %	The gross profit percentage from the merchandise per the forecast.

### 3. 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
- Trading Area
- Quarter

**Figure 4–35 3. Assign Category Roles - Industry Model B View**

Measure [ Label]	LY Recommended Role - Industry Model B	Fc Recommended Role - Industry Model B	WP Override Role - Industry Model B	LY Assigned Role - Industry Model B	WP Assigned Role - Industry Model B	OP Assigned Role - Industry Model B
Baby Food	Flagship	Flagship			Flagship	
Canned Vegetables	Flagship	Flagship			Flagship	
Coffee	Core Traffic	Flagship		ship	Flagship	Flagship
Cookies	Maintain	Maintain			Maintain	
Juice	Under Fire	Cash Machine			Cash Machine	
Pasta	Rehab	Maintain			Maintain	
Salty Snacks	Under Fire	Cash Machine			Cash Machine	

Table 4–26 lists the measures available in this view.

**Table 4–26 3. Assign Category Roles - Industry Model B Measures**

Label	Description
LY Recommended Role - Industry Model B	The role recommended to a category per Industry Model B in last year's assortment.
Fc Recommended Role - Industry Model B	The role recommended to a category per Industry Model B and the forecasted values of respective measures.
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	The role assigned to a category per Industry Model B in last year's category plan.
WP Assigned Role - Industry Model B	The role assigned to a category per Industry Model B in the working plan.
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

Strategies suggest the overall approach to achieve the required or assigned role to a category. If roles represent the vision of a business unit, then strategies represent the mission of the business unit. Strategies are generally assigned at the sub-category level, but sometimes at the category level as well. Strategies are assigned on the basis of specific analysis of historic or forecast data at a specific consumer segment level or overall consumer segment level. It is important to note here that the user's discretion, as in role assignment, plays an important role in strategy assignment.

It is also important to note here that strategies assigned to a product category influence the weights assignment for IPI calculations. The system-recommended assortment can be generated using the IPI-based assortment method in the Assortment Planning process.

Strategies along with roles, tactics and category plan targets are shared with assortment planning and MSO tasks. They are used as a reference or a set of guidelines in assortment planning and MSO.

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

The specific set of strategies that can be assigned in this step in the following:

- Cash Generating: Identified by plotting a chart between Purchase Frequency and Inventory Turns.
- Excitement Generating: Represented by spikes in Sales (LY/Forecast) during a festive period.
- Image Enhancing: Identified by looking at a chart between Purchase Frequency and Retail Sales.
- Profit Generating: Has a high bottom-line or gross profit retail value.
- Traffic building: Identified by looking at a chart between Market Share and Purchase Frequency.
- Transaction Building: Identified by plotting a graph between Purchase Frequency And Basket Value.
- Turf-Defending: Represented by having a high average Buyer Conversion Rate.

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

- Retailer's POS data
- Predefined category strategies

This step has the following views:

1. [Assign Strategies View](#)
2. [Identify Cash Generators View](#)
3. [Identify Excitement Generators View](#)
4. [Identify Image Enhancer View](#)
5. [Identify Profit Generators View](#)
6. [Identify Traffic Builders View](#)
7. [Identify Transaction Builders View](#)
8. [Identify Turf-Defenders View](#)

## 1. 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 1. Assign Strategies View**

		1st Qtr, FY2013	2nd Qtr, FY2013	3rd Qtr, FY2013	4th Qtr, FY2013	1st Qtr, FY2014	2nd Qtr, FY2014	3rd Qtr, FY2014	4th Qtr, FY2014
Iced Cookies	WP Strategy Assignment					Traffic Buildi...			
	OP Strategy Assignment					Traffic Buildi...			
	LY Strategy Assignment								
Instant	WP Strategy Assignment								
	OP Strategy Assignment								
Lasagna	LY Strategy Assignment								
	WP Strategy Assignment					Transact			
	OP Strategy Assignment					Traffic Building			
Mini Cookies	WP Strategy Assignment					Transaction ...			
	LY Strategy Assignment					Profit Contrib...			
	OP Strategy Assignment					Cash Gener...			
Nuts/Trail Mix	WP Strategy Assignment					Excitement C...			
	LY Strategy Assignment					Image Enha...			
	OP Strategy Assignment					Search...			

Table 4–27 lists the measures available in this view.

**Table 4–27 1. Assign Strategies Measures**

Label	Definition
LY Strategy Assignment	A strategy assigned to a category or sub-category in last year's category plan. Strategy represents the overall approach to attain the assigned role to a category.
WP Strategy Assignment	A strategy assigned to a sub-category or category in the working plan in Category Planning. Strategy represents the overall approach to attain the assigned role to a category.
OP Strategy Assignment	A strategy assigned to a sub-category or a category in the original plan in Category Planning. Strategy represents the overall approach to attain the assigned role to a category.

## 2. 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 2. Identify Cash Generators View**

	WP Turn	Purchase Frequency	WP Sales by Consumer Seg U
› Baby Food		10.43	4,120,592
› Canned Vegetables		15.65	5,022,554
▼ Coffee			
Ground			549,352
Instant			177,793
Single Serve			206,725
Whole			212,322
› Cookies		10.50	1,523,160
› Juice		7.28	2,036,326
› Pasta		5.60	520,100
› Salty Snacks		3.22	3,231,943

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

**Table 4–28 2. Identify Cash Generators Measures**

Label	Definition
WP Turn	Inventory turns in a working plan. It reflects the number of times the carried inventory can be rolled over in a specified period of time.
Purchase Frequency	The total number of times an item or merchandise from a particular product group is purchased in a given time period. It is also looked at consumer segment-wise.
WP Sales by Consumer Seg U	The sales units contribution in percentage points by a consumer segment to the overall sales units in the working plan assortment. It is used to identify excitement generating, a type of strategy assignment, sub-categories in Category Planning.

### 3. 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.

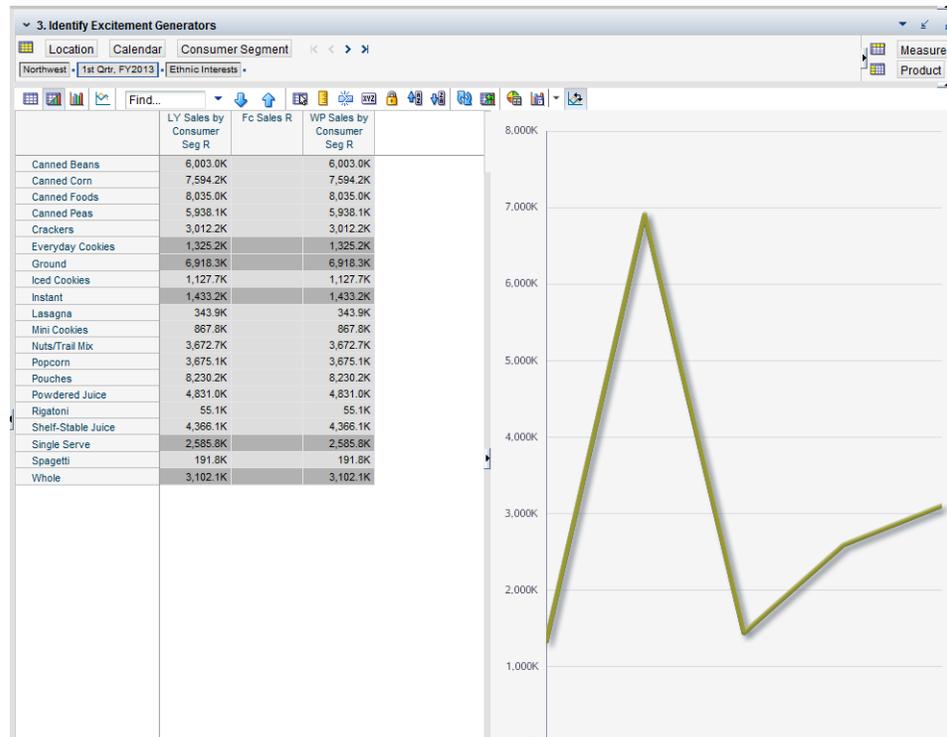
**Figure 4–38 3. Identify Excitement Generators View**

Table 4–29 lists the measures available in this view.

**Table 4–29 3. Identify Excitement Generators Measures**

Label	Definition
LY Sales by Consumer Seg R	The sales retail contribution in percentage points by a consumer segment to the overall sales retail in last year's assortment.
Fc Sales R	Forecasted sales retail value for a specific time period. It is generated in RCM by using AutoES libraries sourced from RDF. AutoES libraries are embedded in RCM. AutoES uses historic data to generate these forecasts. It can be scheduled periodically through batch jobs.
WP Sales by Consumer Seg R	The sales retail contribution in percentage points by a consumer segment to the overall sales retail in the working plan. It is used to identify excitement generators, a type of strategy assignment, sub-categories in Category Planning.

#### 4. 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 4. Identify Image Enhancer View**

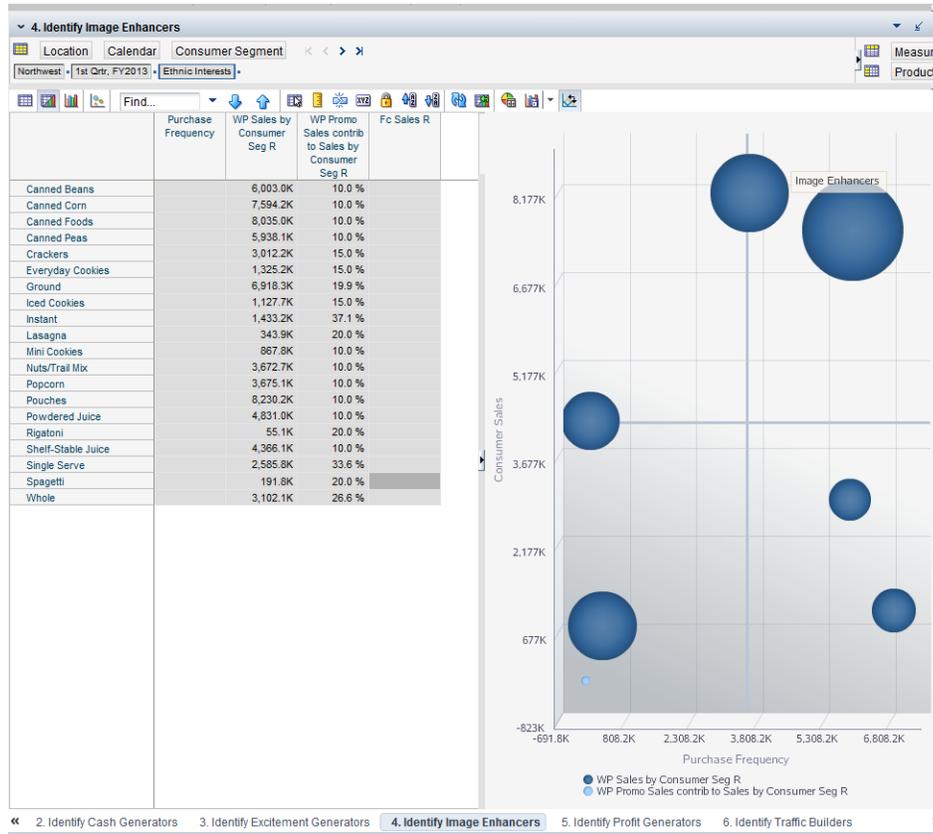


Table 4–30 lists the measures available in this view.

**Table 4–30 4. Identify Image Enhancer Measures**

Label	Definition
Purchase Frequency	The total number of times an item or merchandise from a particular product group is purchased in a given time period. It is also looked at consumer segment-wise.
Wp Sales by Consumer Seg R	The sales retail contribution in percentage points by a consumer segment to the overall sales retail in the working plan. It is used to identify excitement generators, a type of strategy assignment, sub-categories in Category Planning.
WP Promo Sales contrib to Sales by Consumer Seg R	The contribution (in percentage points) of promotional sales retail towards the overall sales retail at the consumer segment level. It is used to identify image enhancers, a type of strategy, sub-categories in Category Planning.
Fc Sales R	Forecasted sales retail value for a specific time period. It is generated in RCM by using AutoES libraries sourced from RDF. AutoES libraries are embedded in RCM. AutoES uses historic data to generate these forecasts. It can be scheduled periodically through batch jobs.

### 5. 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 5. Identify Profit Generators View**

	WP Gross Profit by Consumer Seg R
Canned Beans	6,003.0K
Canned Corn	7,594.2K
Canned Foods	8,035.0K
Canned Peas	5,938.1K
Crackers	3,012.2K
Everyday Cookies	1,325.2K
Ground	6,918.3K
Iced Cookies	1,127.7K
Instant	1,433.2K

Table 4–31 lists the measures available in this view.

**Table 4–31 5. Identify Profit Generators Measure**

Label	Definition
WP Gross Profit by Consumer Seg R	The gross profit retail value for a consumer segment. It is used to identify profit generator, a type of strategy, sub-categories in Category Planning.

## 6. 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 6. Identify Traffic Builders View**

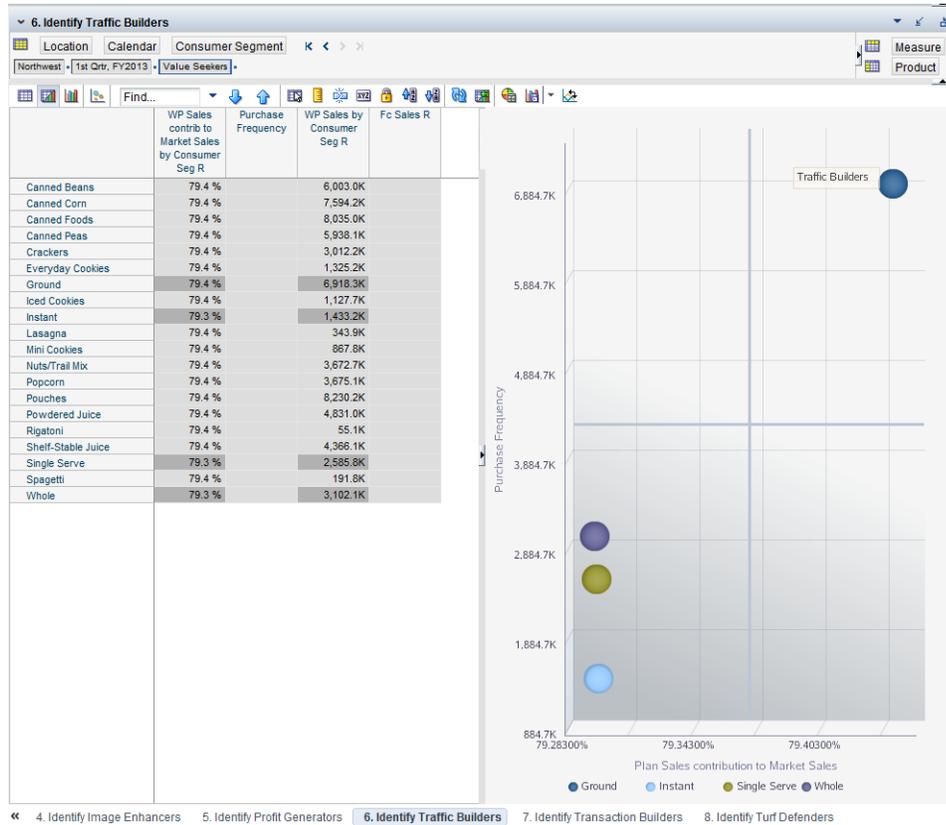


Table 4–32 lists the measures available in this view.

**Table 4–32 6. 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	The total number of times an item or merchandise from a particular product group is purchased in a given time period. It is also looked at consumer segment-wise.
WP Sales by Consumer Seg R	The sales retail contribution in percentage points by a consumer segment to the overall sales retail in the working plan. It is used to identify excitement generators, a type of strategy assignment, sub-categories in Category Planning.
Fc Sales R	Forecasted sales retail value for a specific time period. It is generated in RCM by using AutoES libraries sourced from RDF. AutoES libraries are embedded in RCM. AutoES uses historic data to generate these forecasts. It can be scheduled periodically through batch jobs.

## 7. 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

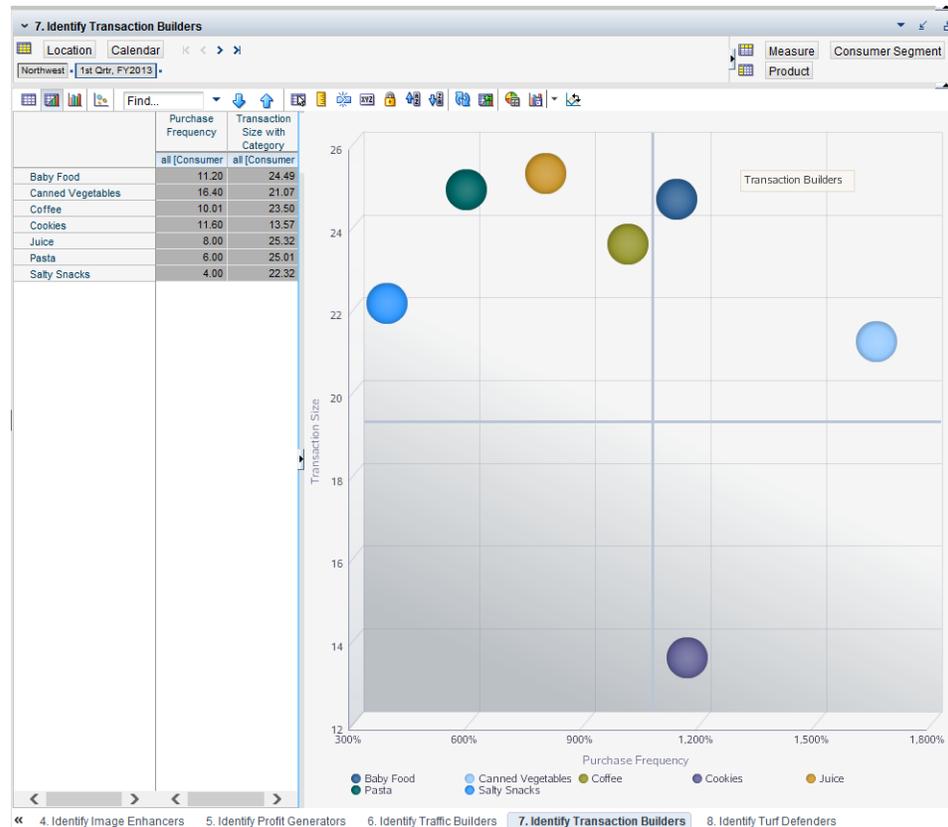
**Figure 4–42 7. Identify Transaction Builders View**

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

**Table 4–33 7. Identify Transaction Builders Measures**

Label	Definition
Purchase Frequency	The total number of times an item or merchandise from a particular product group is purchased in a given time period. It is also looked at consumer segment-wise.
Transaction Size with Category	The average basket share value for a particular product category in a customer's basket.

## 8. 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, representing the retailer and its competitors
- Consumer Segment
- Trading Area

**Figure 4–43 8. Identify Turf-Defenders View**

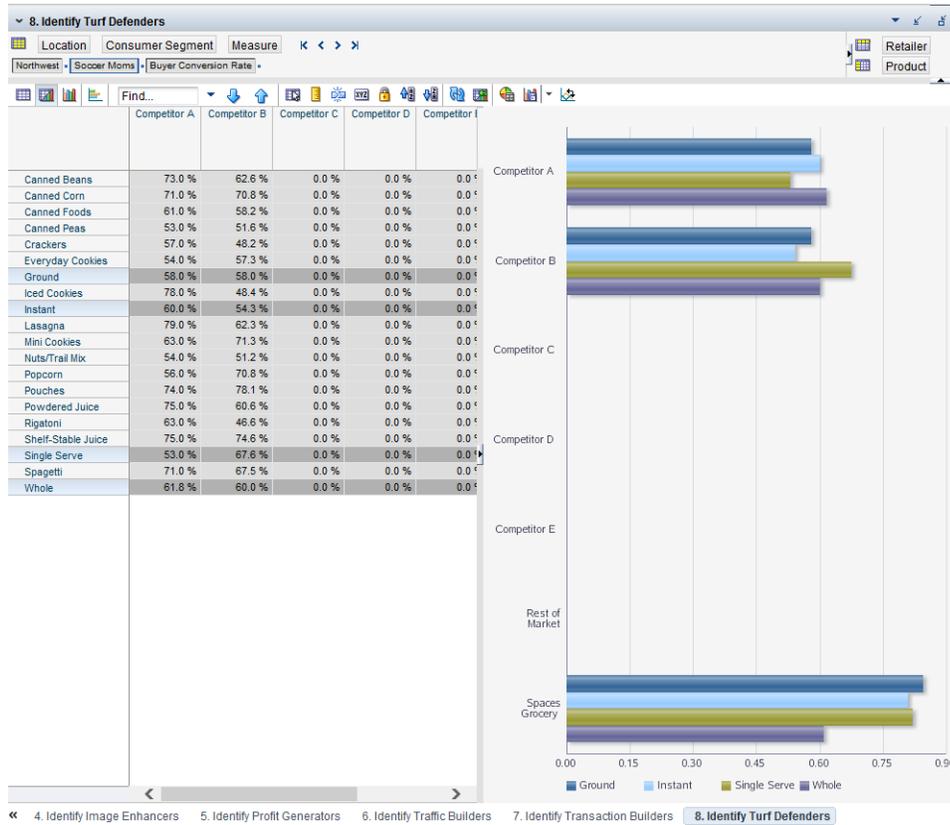


Table 4–34 lists the measure available in this view.

**Table 4–34 8. Identify Turf-Defenders Measure**

Label	Definition
Buyer Conversion Rate	Percentage of shoppers who buy an item or specific set of merchandise, sub-category, category, and so on, out of the total shoppers who shop at the store or the retailer.

## Assign Category Tactics Step

Tactics are a set of activities used to attain the set strategy to a product category. This is how roles, strategies, and tactics are interconnected to each other. Tactics are assigned at the sub-category level in a product hierarchy. If the role to a category is a vision to a business unit and strategy is like a mission to the business unit, then tactics are set of goals to be put to action. They are key guidelines to derive an assortment plan.

Tactics along with roles, strategies, tactics, and category plan targets are shared with assortment planning and MSO. They are used as a reference or a set of guidelines in assortment planning and MSO.

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 the sub-category and trading area. 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 or 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

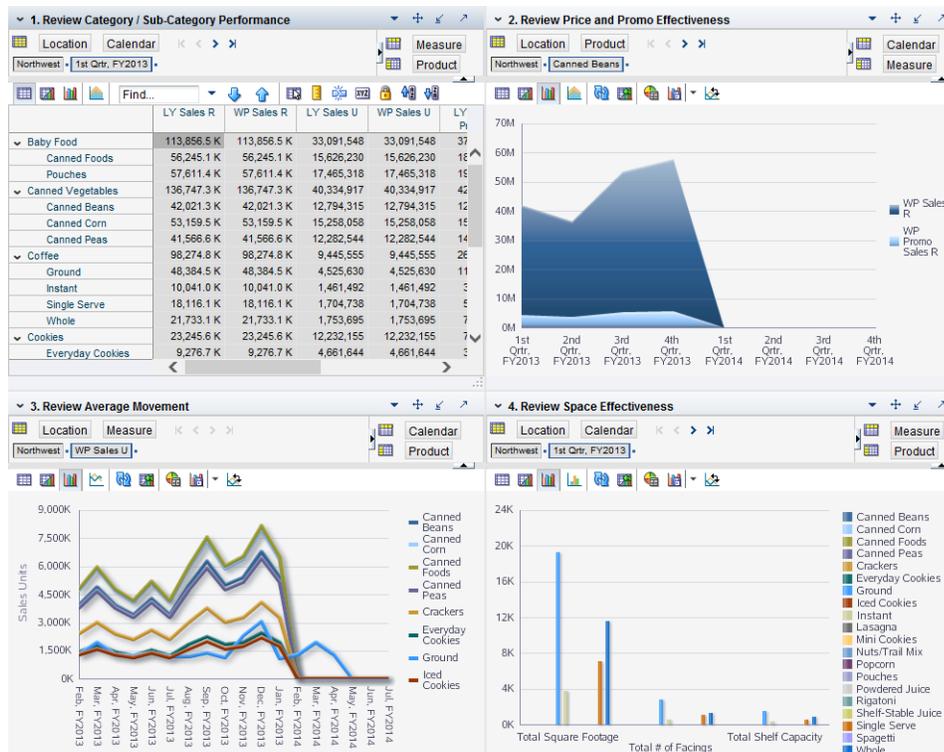
This step has the following tabs and views:

- **Review Category Performance to Role Tab:**
  1. Review Category / Sub-Category Performance View
  2. Review Price and Promo Effectiveness View
  3. Review Average Movement View
  4. Review Space Effectiveness View
- **Assign Category Tactics Tab:**
  - Assign Category Tactics 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**



### 1. Review Category / Sub-Category Performance View

Use this view to review the performance of the assortment.

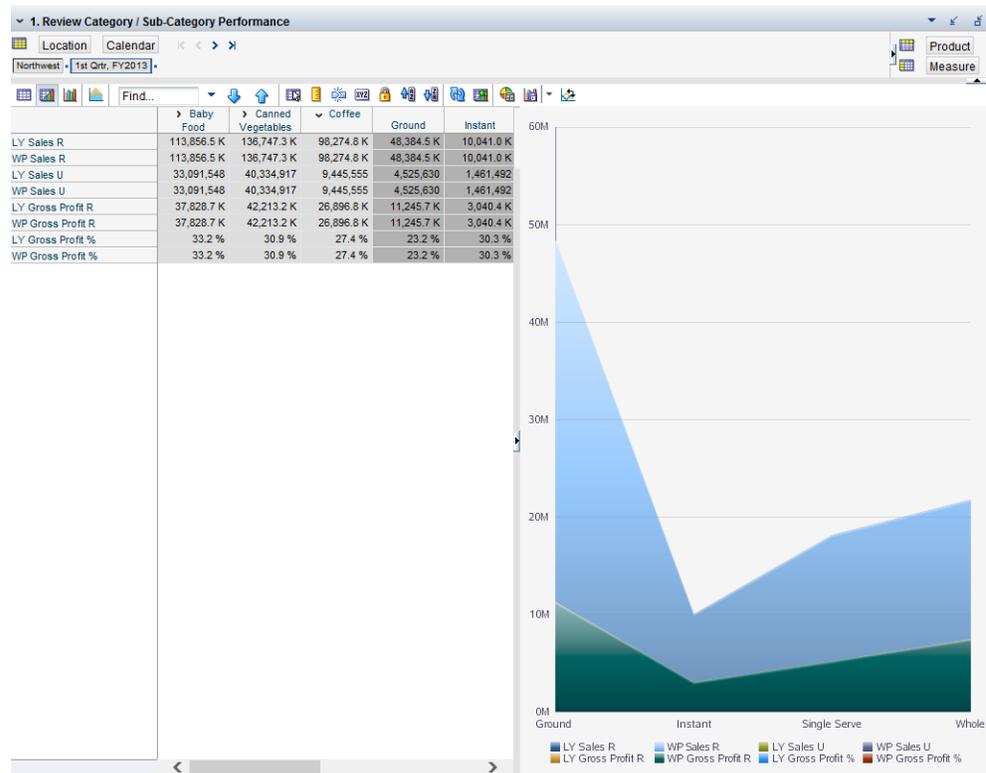
**Figure 4–45 1. Review Category / Sub-Category Performance View**

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

**Table 4–35 1. Review Category / Sub-Category Performance Measures**

Label	Definition
LY Sales R	Sales retail value, for a category or sub-category, per last year's actuals.
WP Sales R	Sales retail value, for a category or sub-category, per the working plan version of the category plan.
LY Sales U	Sales units, for a category or sub-category, per last year's actuals.
WP Sales U	Sales units, for a category or sub-category, per the working plan version of the category plan.
LY Gross Profit R	Last year's gross profit retail value (actuals) from the merchandise.
WP Gross Profit R	Last year's gross profit percentage from the merchandise at the category and sub-category levels.
LY Gross Profit %	Last year's gross profit percentage from the merchandise.
WP Gross Profit %	The gross profit percentage from the merchandise in the working plan version of the category plan.

## 2. 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:

- Sub-category
- Trading Area
- Quarter

**Figure 4–46 2. Review Price and Promo Effectiveness View**

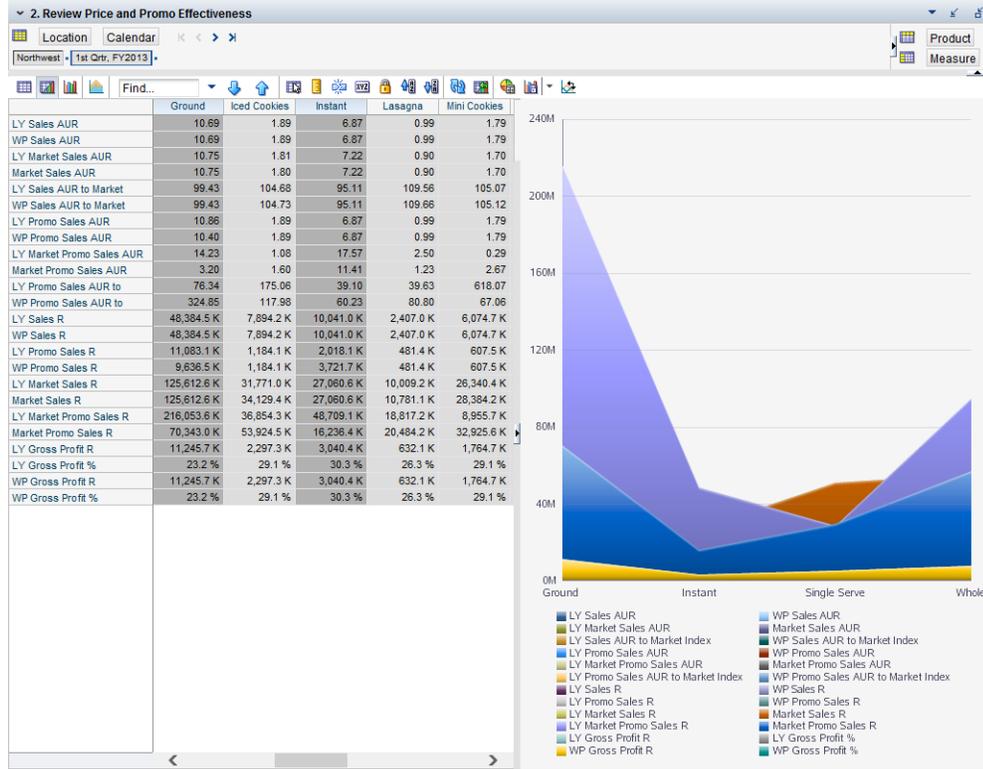


Table 4–36 lists the measures available in this view.

**Table 4–36 2. Review Price and Promo Effectiveness Measures**

Label	Definition
LY Sales AUR	Last year's actual average unit retail value of a SKU. It reflects the average selling price of a SKU at a specific product hierarchy level based on last year's actual sales.
WP Sales AUR	Average unit retail value for an item (all items included) in a working plan version of the category plan. It reflects the average selling price of a SKU at different product hierarchy levels in the working plan assortment.
LY Market Sales AUR	Last year's average unit retail value of the merchandise calculated from market sales actuals (typically for a trading area). It is typically sourced from third parties providing syndicated data such as, Nielsen, IRI, and so on, on a quarterly basis.
Market Sales AUR	Average unit retail value of the merchandise calculated from market sales actuals (typically for a trading area). It is typically sourced from third parties providing syndicated data such as, Nielsen, IRI, and so on, on a quarterly basis.
LY Sales AUR to Market Index	An index value based on the ratio of retail sales' Average Unit Retail to market sales' Average Unit Retail for last year's assortment.

**Table 4–36 (Cont.) 2. Review Price and Promo Effectiveness Measures**

<b>Label</b>	<b>Definition</b>
WP Sales AUR to Market Index	An index value based on the ratio of Retail Sales' Average Unit Retail to Market Sales' Average Unit Retail for the working plan assortment.
LY Promo Sales AUR	The average unit retail value for the promotional sales in a last year's assortment.
WP Promo Sales AUR	The average unit retail value for the promotional sales in a working plan assortment.
LY Market Promo Sales AUR	Average Unit Retail for the promotional sales in Last Year's Plan. This data is sourced from third-party syndicate data suppliers.
Market Promo Sales AUR	Average unit retail value of a SKU based on promotional sales actuals in the market as a whole (typically trading area). It is typically sourced from third parties providing syndicated data such as, Nielsen, IRI, and so on, on a quarterly basis.
LY Promo Sales AUR to Market Index	An index value based on the ratio of promotional sales' Average Unit Retail to Market Sales Average Unit Retail for last year's assortment.
WP Promo Sales AUR to Market Index	An index value based on the ratio of Promotional Sales' Average Unit Retail to Market Sales Average Unit Retail for the working plan assortment.
LY Sales R	Sales retail value, for a category or sub-category, per last year's actuals.
WP Sales R	Sales retail value, for a category or sub-category, per the working plan version of the category plan.
LY Promo Sales R	Last year's promotional sales retail value actuals.
WP Promo Sales R	Promotional sales retail in the working plan version of the category plan.
LY Market Sales R	Last year's sales retail value of the merchandise in the market, typically at the trading area level or above. This information is sourced from third parties providing syndicated data such as, Nielsen, IRI, and so on, on a quarterly basis.
Market Sales R	The sales retail value of the merchandise in the market, typically at the trading area level or above. This information is sourced from third parties providing syndicated data such as, Nielsen, IRI, and so on, on a quarterly basis.
LY Market Promo Sales R	Last year's promotional sales retail for the market, typically at the trading area level or above. This information is sourced from third parties providing syndicated data such, Nielsen, IRI, and so on, on a quarterly basis.
Market Promo Sales R	Promotional sales retail for the market, typically at the trading area level or above. This information is sourced from third parties providing syndicated data such as, Nielsen, IRI, and so on, on a quarterly basis.
LY Gross Profit R	Last year's gross profit retail value (actuals) from the merchandise.
LY Gross Profit %	Last year's gross profit percentage from the merchandise.
WP Gross Profit R	The gross profit retail value from the merchandise in the working plan version of the category plan.
WP Gross Profit %	The gross profit percentage from the merchandise in the working plan version of the category plan.

### 3. 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 3. Review Average Movement View

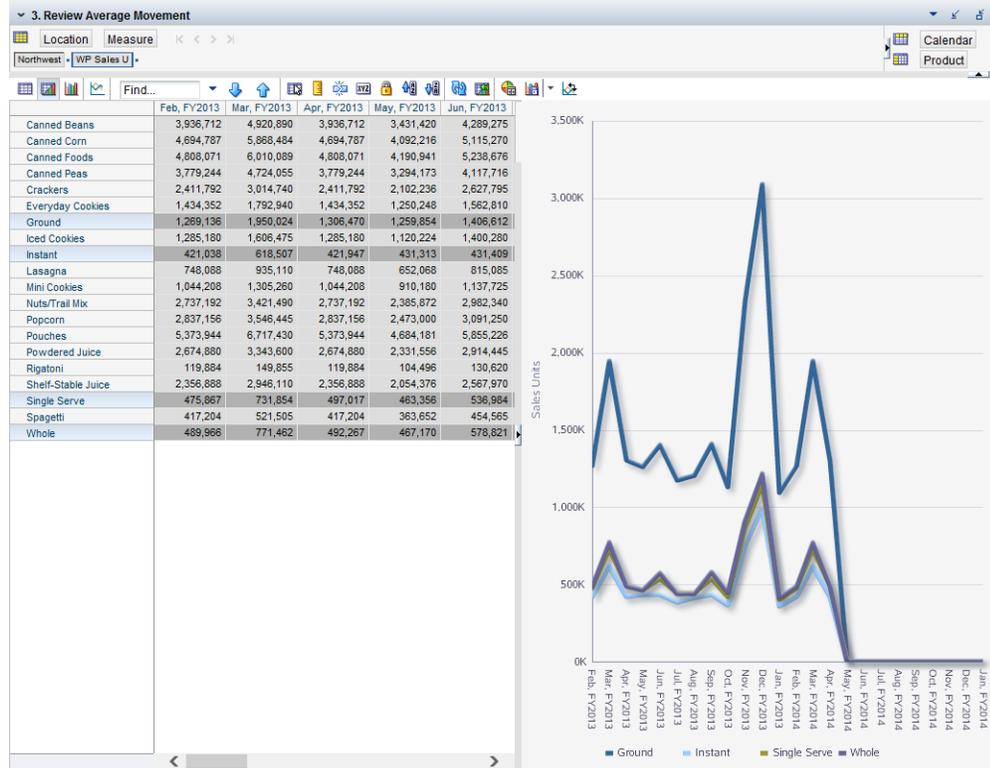


Table 4-37 lists the measure available in this view.

Table 4-37 3. Review Average Movement Measure

Label	Definition
WP Sales U	The sales units from the merchandise in the working plan version of the category plan.

### 4. 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.

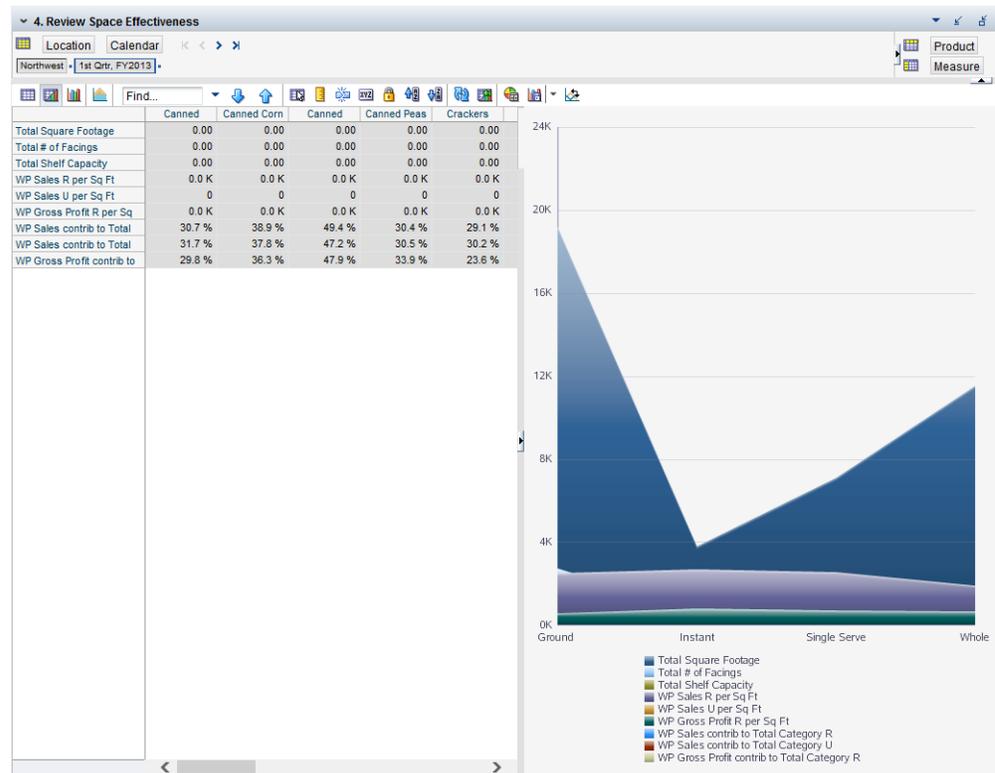
**Figure 4–48 4. Review Space Effectiveness View**

Table 4–38 lists the measures available in this view.

**Table 4–38 4. 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	The total quantity of an item that can fit into the overall space allocated to it.
WP Sales R per Sq Ft	The working plan assortment's sales retail return per square feet. It is calculated by dividing sales retail value by the area (or space in square feet) allocated to that particular merchandise.
WP Sales U per Sq Ft	The working plan assortment's sales units return per square feet. It is calculated by dividing sales units from the merchandise by the area (or space in square feet) allocated to that particular merchandise.
WP Gross Profit R per Sq Ft	The gross profit retail return per square feet from the merchandise in the working plan assortment. It is calculated by dividing Gross Profit Retail Value from the merchandise by the area (or space, in square feet) allocated to the merchandise.
WP Sales contrib to Total Category R	The contribution, in percentage points, of a sub-category's sales retail value to the overall category sales retail value.
WP Sales contrib to Total Category U	The contribution, in percentage points, of a sub-category's units' value to the overall category sales units value.

**Table 4–38 (Cont.) 4. Review Space Effectiveness Measures**

Label	Definition
WP Gross Profit contrib to Total Category R	The percentage contribution of a sub-category to category's gross profit retail.

## 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. Depending upon the role and strategy assigned to product category and sub-category, tactics are assigned.

Tactics are a set of actions to be implemented to achieve the set role and strategy. These actions are assigned specific to sub-category and can be in the form of assortment or product-mix changes, inventory-holding, pricing of products, type of promotions to be run, and the space that needs to be allotted. A thorough implementation of tactics determines the alignment of a sub-category to the role and strategy assignment and the overall category plan of the retailer.

**Figure 4–49 Assign Category Tactics View**

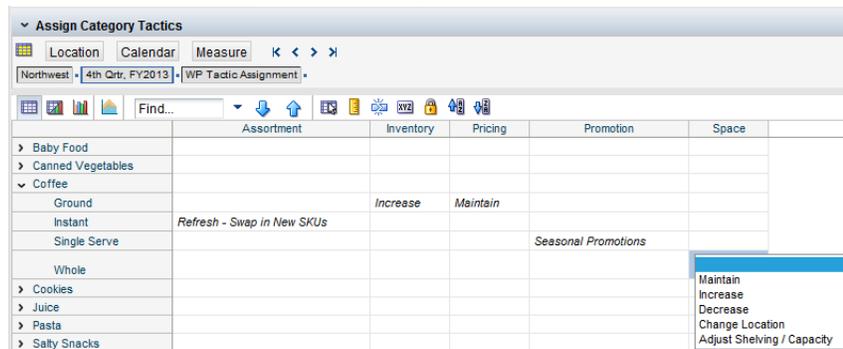


Table 4–39 lists the measure available in this view.

**Table 4–39 Assign Category Tactic Measure**

Label	Definition
WP Tactic Assignment	Used to assign the tactics' value to a sub-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 (such as Sales, Gross Profit, Inventory, and so on) at the category and sub-category level and formally approving them. On approval, the category plan is shared with assortment planning and the MSO task in the form of target (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 using the Seed Sales custom menu option. Use this step to derive the final category plan.

This step contains the following tabs and views:

- [Scorecard Summary View](#)
- [Seed Sales Tab:](#)
  - [Review Sales View](#)
  - [Seed Sales View](#)
- [Set Sales and Profit Targets Tab:](#)
  1. [Set Sales and Profit Targets View](#)
  2. [Set Promo Sales Targets View](#)
  3. [Set Private Label Targets View](#)
- [Set Inventory Targets Tab:](#)
  - [Set Inventory Targets View](#)
- [Approve Tab:](#)
  - [Approve Assortment Strategies, Tactics, and Scorecard View](#)

This step also contains the following custom menu option 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:

- [Sales](#)
- [Promo Sales](#)
- [Private Label](#)

**Figure 4–50 Scorecard Summary Sales Measure Profile View**

	> Baby Food	> Canned Vegetables	> Coffee	Ground	Instant	Single Serve	Whole
LY Sales R	113,856.5 K	136,747.3 K	98,274.8 K	48,384.5 K	10,041.0 K	18,116.1 K	21,733.1 K
WP Sales R	0.0 K	0.0 K	98,274.8 K	48,384.5 K	10,041.0 K	18,116.1 K	21,733.1 K
WP Sales var to LY R	-100.0 %	-100.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
OP Sales R	0.0 K	0.0 K	98,274.8 K	48,384.5 K	10,041.0 K	18,116.1 K	21,733.1 K
OP Sales var to LY R	-100.0 %	-100.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
LY Gross Profit R	37,828.7 K	42,213.2 K	26,896.8 K	11,245.7 K	3,040.4 K	5,177.2 K	7,433.5 K
LY Gross Profit %	33.2 %	30.9 %	27.4 %	23.2 %	30.3 %	28.6 %	34.2 %
WP Gross Profit R	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K
WP Gross Profit %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
WP Gross Profit var to LY R	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
OP Gross Profit R	0.0 K	0.0 K	123,456.0 K	30,864.0 K	30,864.0 K	30,864.0 K	30,864.0 K
OP Gross Profit %	0.0 %	0.0 %	125.6 %	63.8 %	307.4 %	170.4 %	142.0 %
OP Gross Profit var to LY R	-100.0 %	-100.0 %	359.0 %	174.5 %	915.1 %	496.2 %	315.2 %
LY Avg Inv R	9,952.5 K	11,953.4 K	8,662.5 K	4,264.5 K	881.4 K	1,596.8 K	1,919.8 K
WP Avg Inv R	0.0 K	0.0 K	56,789.0 K	14,197.3 K	14,197.3 K	14,197.3 K	14,197.3 K
OP Avg Inv R	0.0 K	0.0 K	56,789.0 K	14,197.3 K	14,197.3 K	14,197.3 K	14,197.3 K
LY Turn	63.0	62.9	58.0	58.1	58.4	57.7	58.1
WP Turn	0.0	0.0	8.9	17.4	3.6	6.5	7.9
OP Turn	0.0	0.0	1.7	3.4	0.7	1.3	1.5

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	Sales retail value, for a category or sub-category, per last year's actuals.
WP Sales R	The working plan assortment's sales retail value.
WP Sales var to LY R	The working plan's sales retail value's variance to the same in last year's actuals.
OP Sales R	Approved category plan's (referred to as original plan) sales retail value. It is shared as a target with assortment planning and MSO.
OP Sales var to LY R	The original plan's sales retail value's variance to the same in last year's actuals.
LY Gross Profit R	The gross profit retail value from the merchandise. This measure is different from the LY Assort Gross Profit R measure as it reflects gross profit retail for all items irrespective of whether or not these items are part of last year's assortment.
LY Gross Profit %	The gross profit percentage from the merchandise in last year's assortment. This measure is different from the LY Assort Gross Profit % measure as it reflects gross profit percentage for all items irrespective of whether or not these items are part of last year's assortment.
WP Gross Profit R	The gross profit retail from the merchandise in the working plan assortment. This measure is different from the WP Assort Gross Profit R measure as it reflects gross profit retail for all items irrespective of whether or not these items are part of the working plan assortment.

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

<b>Label</b>	<b>Definition</b>
WP Gross Profit %	The gross profit percentage from the merchandise in the working plan assortment. This measure is different from the WP Assort Gross Profit % measure as it reflects gross profit percentage for all items irrespective of whether or not these items are part of the working plan assortment.
WP Gross Profit var to LY R	The working plan's gross profit retail value's variance to last year's gross profit retail value actuals.
OP Gross Profit R	Approved category plan's (referred to as original plan) gross profit retail value. It is shared as a target with assortment planning and MSO.
OP Gross Profit %	Approved category plan's (referred to as original plan) gross profit percentage. It is shared as a target with assortment planning and MSO.
OP Gross Profit var to LY	The original plan's gross profit value's variance to the same in last year's actuals.
LY Avg Inv R	Average inventory retail value or stock retail value carried by the category or sub-category per last year's actuals. Average inventory retail value represents an average retail value of merchandise bought, received, and carried by the retailer before it gets sold at any point in time. This average inventory retail value is generally calculated on a weekly basis or a monthly basis to get an understanding of the money invested in inventory or buying merchandise.
WP Avg Inv R	Average inventory retail value to be carried by a category or sub-category in given planning period per the category plan's working plan version.
OP Avg Inv R	Average inventory retail value to be carried by a category or sub-category per the approved category plan or the original plan.
LY Turn	Inventory turns in last year's assortment. It reflects the number of times the carried inventory can be rolled over in a specified period of time.
WP Turn	Inventory turns in a working plan. It reflects the number of times the carried inventory can be rolled over in a specified period of time.
OP Turn	Inventory turns in the original plan. It reflects the number of times the carried inventory can be rolled over in a specified period of time.

**Figure 4–51 Scorecard Summary Promo Sales Measure Profile View**

	Baby Food	Canned	Pouches	Canned Vegetables	Canned	Canned Corn
LY Sales R	113,856.5 K	56,245.1 K	57,611.4 K	136,747.3 K	42,021.3 K	53,159.5 K
WP Sales R	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K
WP Sales var to LY R	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
OP Sales R	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K
OP Sales var to LY R	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
LY Promo Sales R	11,385.6 K	5,624.5 K	5,761.1 K	13,674.7 K	4,202.1 K	5,315.9 K
LY Promo Sales contrib to LY Sales R	10.0 %	10.0 %	10.0 %	10.0 %	10.0 %	10.0 %
WP Promo Sales R	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K
WP Promo Sales contrib to WP Sales R	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
WP Promo Sales var to LY R	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
OP Promo Sales R	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K
OP Promo Sales contrib to OP Sales R	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
OP Promo Sales var to LY R	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
LY Gross Profit R	37,828.7 K	18,117.1 K	19,711.6 K	42,213.2 K	12,594.3 K	15,319.5 K
LY Gross Profit %	33.2 %	32.2 %	34.2 %	30.9 %	30.0 %	28.8 %
WP Gross Profit R	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K
WP Gross Profit %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
WP Gross Profit var to LY R	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
OP Gross Profit R	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K
OP Gross Profit %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
OP Gross Profit var to LY R	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %

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	Sales retail value, for a category or sub-category, per last year's actuals.
WP Sales R	Sales retail value, for a category or sub-category, in the working plan version of the category plan.
WP Sales var to LY R	The working plan's sales retail value's variance to the same in last year's actuals.
OP Sales R	Approved category plan's (referred to as original plan) sales retail value. It is shared as a target with assortment planning and MSO.
OP Sales var to LY R	The original plan's sales retail value's variance to the same in last year's actuals.
LY Promo Sales R	Last year's promotional sales retail value actuals.
LY Promo Sales contrib to LY R	Promotional sales retail contribution, in percentage points, to the overall sales retail of last year's assortment.
WP Promo Sales R	Promotional sales retail in the working plan version of the category plan.
WP Promo Sales contrib to WP Sales R	The promotional sales retail contribution, in percentage points, to the overall sales retail of the working plan assortment.
WP Promo Sales var to LY R	The working plan's promotional sales retail value's variance to the same in last year plan's actuals.
OP Promo Sales R	Promotional sales retail in the original plan assortment.
OP Promo Sales contrib to OP Sales R	The original plan's promotional sales retail value's variance to the same in last year plan's actuals.

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

<b>Label</b>	<b>Definition</b>
OP Promo Sales var to LY R	The original plan's promotional sales retail value's variance to the same in last year's actuals.
LY Gross Profit R	Last year's gross profit retail value (actuals) from the merchandise at the category and sub-category levels.
LY Gross Profit %	Last year's gross profit percentage from the merchandise at the category and sub-category levels.
WP Gross Profit R	The gross profit retail from the merchandise in the working plan assortment version of the category plan.
WP Gross Profit %	The gross profit percentage from the merchandise in the working plan version of the category plan.
WP Gross Profit var to LY R	The working plan's gross profit retail value's variance to last year's gross profit retail value actuals.
OP Gross Profit R	Approved category plan's (referred to as original plan) gross profit retail value. It is shared as a target with assortment planning and MSO.
OP Gross Profit %	Approved category plan's (referred to as original plan) gross profit percentage. It is shared as a target with assortment planning and MSO.
OP Gross Profit var to LY	The original plan's gross profit value's variance to the same in last year's actuals.

**Figure 4–52 Scorecard Summary Private Label Measure Profile View**

	Baby Food	Canned	Pouches	Canned Vegetables	Canned	Canned Corn	Can
LY Sales R	113,856.5 K	56,245.1 K	57,611.4 K	136,747.3 K	42,021.3 K	53,159.5 K	4
WP Sales R	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	
WP Sales var to LY R	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	
OP Sales R	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	
OP Sales var to LY R	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	
LY Private Label Sales R	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	
LY Private Label Sales contrib to LY Sales R	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	
WP Private Label Sales R	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	
WP Private Label Sales contrib to WP Sales R	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	
WP Private Label Sales var to LY R	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	
OP Private Label Sales R	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	
OP Private Label Sales contrib to OP Sales R	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	
OP Private Label Sales var to LY R	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	
LY Gross Profit R	37,828.7 K	18,117.1 K	19,711.6 K	42,213.2 K	12,594.3 K	15,319.5 K	1
LY Gross Profit %	33.2 %	32.2 %	34.2 %	30.9 %	30.0 %	28.8 %	
WP Gross Profit R	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	
WP Gross Profit %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	
WP Gross Profit var to LY R	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	
OP Gross Profit R	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	
OP Gross Profit %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	
OP Gross Profit var to LY R	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	
LY Private Label Gross Profit R	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	
LY Private Label Gross Profit %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	
WP Private Label Gross Profit R	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	
WP Private Label Gross Profit %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	
WP Private Label Gross Profit var to LY R	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	
OP Private Label Gross Profit R	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	
OP Private Label Gross Profit %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	
OP Private Label Gross Profit var to LY R	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	

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	Sales retail value, for a category or sub-category, per last year's actuals.
WP Sales R	Sales retail value, for a category or sub-category, in the working plan version of the category plan.
WP Sales var to LY R	The working plan's sales retail value's variance to the same in last year's actuals.
OP Sales R	Approved category plan's (referred to as original plan) sales retail value. It is shared as a target with assortment planning and MSO.
OP Sales var to LY R	The original plan's sales retail value's variance to the same in last year's actuals.
LY Private Label Sales R	Sales retail value from private label merchandise, for a category or sub-category, per last year's actuals.
LY Private Label Sales contrib to LY Sales R	Sales retail contribution of private label items to the overall sales retail of last year's assortment expressed in percentage points.
WP Private Label Sales R	The private label items' sales retail value in a working plan assortment.

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

<b>Label</b>	<b>Definition</b>
WP Private Label Sales contrib to WP Sales R	The sales retail contribution of private label items to the overall sales retail of the working plan assortment expressed in percentage points.
WP Private Label Sales var to LY R	The working plan's private label items' sales retail variance to the same in last year plan's actuals.
OP Private Label Sales R	The private label items' sales retail value in the pre-season original plan assortment.
OP Private Label Sales contrib to OP Sales R	The original plan's private label sales retail value's contribution to the overall sales retail value in the original plan.
OP Private Label Sales var to LY R	The original plan's private label items' sales retail variance to the same in last year plan's actuals.
LY Gross Profit R	Last year's gross profit retail value (actuals) from the merchandise at the category and sub-category levels.
LY Gross Profit %	Last year's gross profit percentage from the merchandise at the category and sub-category levels.
WP Gross Profit R	The gross profit retail from the merchandise in the working plan version of the category plan.
WP Gross Profit %	The gross profit percentage from the merchandise in the working plan version of the category plan.
WP Gross Profit var to LY R	The working plan's gross profit retail value's variance to last year's gross profit retail value actuals.
OP Gross Profit R	Approved category plan's (referred to as original plan) gross profit retail value. It is shared as a target with assortment planning and MSO.
OP Gross Profit %	Approved category plan's (referred to as original plan) gross profit percentage. It is shared as a target with assortment planning and MSO.
OP Gross Profit var to LY	The original plan's gross profit value's variance to the same in last year's actuals.
LY Private Label Gross Profit R	Gross profit retail of private label items in a last year's assortment for the cluster.
LY Private Label Gross Profit %	Gross profit percentage of private label items in last year's assortment for the cluster.
WP Private Label Gross Profit R	The gross profit retail of private label items in a working plan version of the category plan.
WP Private Label Gross Profit %	The gross profit percentage of private label items in a working plan version of the category plan.
WP Private Label Gross Profit var to LY R	Variance of private label merchandise's gross profit retail value in the working plan version of the category plan to the same in last year's actuals.
OP Private Label Gross Profit R	Gross profit retail value from private label merchandise in approved category plan (Original Plan).
OP Private Label Gross Profit %	Gross profit percentage from private label merchandise in approved category plan (Original Plan).
OP Private Label Gross Profit var to LY	Variance of private label merchandise's gross profit retail value in approved category plan (Original Plan) to the same in last year's actuals.

## Seed Sales Tab

This tab is used to seed and review plan sales.

### Custom Menu Option

The Seed Sales custom menu is used to populate the WP version of the category plan with LY data. LY sales data is copied to the respective WP Sales Units and Sales Retail measures.

### Review Sales View

Use this view to review LY Sales against the WP Sales. However, WP Sales are set only in the next few views. 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**

	> Baby Food	> Canned Vegetables	▼ Coffee	Ground	Instant	Single Serve	Whole
LY Sales R	8,758.2 K	10,519.0 K	7,078.0 K	3,457.2 K	775.2 K	1,312.8 K	1,532.8 K
LY Sales U	2,545,504	3,102,686	692,168	331,575	112,828	123,915	123,850
LY Private Label Sales R	0.0 K	0.0 K	666.6 K	393.6 K	0.0 K	273.0 K	0.0 K
LY Private Label Sales U	0	0	72,645	42,892	0	29,753	0
LY Promo Sales R	875.8 K	1,051.9 K	3,358.3 K	1,485.6 K	523.7 K	677.5 K	671.5 K
LY Promo Sales U	254,550	310,269	364,862	170,228	76,230	64,247	54,157

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

**Table 4–43 Review Sales Measures**

Label	Definition
LY Sales R	Sales retail value, for a category or sub-category, per last year's actuals.
LY Sales U	Sales units, for a category or sub-category, per last year's actuals.
LY Private Label Sales R	Sales retail value from private label merchandise, for a category or sub-category, per last year's actuals.
LY Private Label Sales U	Sales units from private label merchandise in last year's actuals.
LY Promo Sales R	Last year's promotional sales retail value actuals.
LY Promo Sales U	Promotional sales units in last year's assortment.

### 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).

	WP Seed Sales	WP Seed Sales Comment	WP Seed Sales Date	WP Seed Sales By
Baby Food	<input type="checkbox"/>			
Canned Vegetables	<input type="checkbox"/>			
Coffee	<input type="checkbox"/>	smoke	02/02/2014	adm
Cookies	<input type="checkbox"/>			
Juice	<input type="checkbox"/>			
Pasta	<input type="checkbox"/>			
Salty Snacks	<input type="checkbox"/>			

Table 4–44 lists the measures available in this view.

**Table 4–44 Seed Sales Measures**

Label	Definition
WP Seed Sales	A Boolean measure, at the category level, which needs to be checked before running the Seed Sales custom menu to populate the Category Plan with LY data for the required categories.
WP Seed Sales Comments	Free text field available to the user to add comments while seeding sales.
WP Seed Sales Date	The date on which sales were seeded.
WP Seed Sales By	The user ID which was used to seed sales.

## Set Sales and Profit Targets Tab

This tab has three views:

1. [Set Sales and Profit Targets View](#)
2. [Set Promo Sales Targets View](#)
3. [Set Private Label Targets View](#)

### 1. Set Sales and Profit Targets View

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

**Figure 4–54 1. Set Sales and Profit Targets View**

1. Set Sales and Profit Targets							
Location		Calendar					
Northwest		1st Qtr, FY2014					
Find...							
	> Baby Food	> Canned Vegetables	> Coffee	Ground	Instant	Single Serve	Whole
Fc Sales R	117,097.3 K	140,611.6 K	98,597.2 K	48,543.8 K	10,053.1 K	18,172.0 K	21,828.3 K
WP Sales R	0.0 K	0.0 K	98,274.8 K	48,384.5 K	10,041.0 K	18,116.1 K	21,733.1 K
LY Sales R	113,856.5 K	136,747.3 K	98,274.8 K	48,384.5 K	10,041.0 K	18,116.1 K	21,733.1 K
WP Sales var to LY R	-100.0 %	-100.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
WP Sales var to Fc R	-100.0 %	-100.0 %	-0.3 %	-0.3 %	-0.1 %	-0.3 %	-0.4 %
LY Sales contrib to Product R	22.2 %	26.6 %	19.2 %	49.2 %	10.2 %	18.4 %	22.1 %
WP Sales contrib to Product R	0.0 %	0.0 %	100.0 %	49.2 %	10.2 %	18.4 %	22.1 %
LY Sales contrib to Location R	100.0 %	100.0 %	100.0 %	100.0 %	100.0 %	100.0 %	100.0 %
WP Sales contrib to Location R	0.0 %	0.0 %	100.0 %	100.0 %	100.0 %	100.0 %	100.0 %
LY Sales U	33,091,548	40,334,917	9,445,555	4,525,630	1,461,492	1,704,738	1,753,695
LY Sales AUR	3.44	3.39	10.40	10.69	6.87	10.63	12.39
WP Sales U	0	0	9,445,555	4,525,630	1,461,492	1,704,738	1,753,695
WP Sales AUR	0.00	0.00	10.40	10.69	6.87	10.63	12.39
WP Sales var to LY U	-100.0 %	-100.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Fc Sales U	34,034,602	41,475,372	9,473,370	4,538,509	1,463,256	1,710,222	1,761,384
Fc Sales AUR	3.44	3.39	10.41	10.70	6.87	10.63	12.39
LY Gross Profit R	37,828.7 K	42,213.2 K	26,896.8 K	11,245.7 K	3,040.4 K	5,177.2 K	7,433.5 K
LY Gross Profit %	33.2 %	30.9 %	27.4 %	23.2 %	30.3 %	28.6 %	34.2 %
WP Gross Profit R	0.0 K	0.0 K	29,586.5 K	12,370.3 K	3,344.5 K	5,694.9 K	8,176.8 K
WP Gross Profit %	0.0 %	0.0 %	30.1 %	25.6 %	33.3 %	31.4 %	37.6 %
WP Gross Profit var to LY R	-100.0 %	-100.0 %	10.0 %	10.0 %	10.0 %	10.0 %	10.0 %
LY Sales R per Sq Ft	0.0 K	0.0 K	2.4 K	2.5 K	2.7 K	2.5 K	1.9 K
WP Sales R per Sq Ft	0.0 K	0.0 K	2.4 K	2.5 K	2.7 K	2.5 K	1.9 K
LY Gross Profit R per Sq Ft	0.0 K	0.0 K	0.6 K	0.6 K	0.8 K	0.7 K	0.6 K
WP Gross Profit R per Sq Ft	0.0 K	0.0 K	0.7 K	0.6 K	0.9 K	0.8 K	0.7 K

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

**Table 4–45 1. Set Sales and Profit Targets Measures**

Label	Definition
FC Sales R	Forecasted sales retail value for a specific time period. It is generated in RCM by using AutoES libraries sourced from RDF. AutoES libraries are embedded in RCM. AutoES uses historic data to generate these forecasts. It can be scheduled periodically through batch jobs.
WP Sales R	The working plan assortment's sales retail value.
LY Sales R	Last year's assortment's sales retail value.
WP Sales var to LY R	The working plan's sales retail value's variance to the same in last year's actuals.
WP Sales var to Fc R	The working plan's sales retail value's variance to the same in the forecast.
LY Sales contrib to Product R	The contribution percentage of a sub-category's sales retail to the category's (or higher level product hierarchy) overall sales retail in last year's assortment.
WP Sales contrib to Product R	The sales retail contribution percentage of a specific set of merchandise to a category's (or higher level product hierarchy) overall sales retail in the working plan assortment.
LY Sales contrib to Location R	The sales retail contribution percentage of a specific set of merchandise to a location's (on the location hierarchy) overall sales retail in last year's assortment.

**Table 4–45 (Cont.) 1. Set Sales and Profit Targets Measures**

<b>Label</b>	<b>Definition</b>
WP Sales contrib to Location R	The sales retail contribution percentage of a specific set of merchandise to a location's (on the location hierarchy) overall sales retail in the working plan assortment.
LY Sales U	Sales units, for a category or sub-category, per last year's actuals.
LY Sales AUR	Last year's actual average unit retail value of a SKU. It reflects the average selling price of a SKU at a specific product hierarchy level based on last year's actual sales.
WP Sales U	The sales units from the merchandise in the working plan version of the category plan.
WP Sales AUR	Average unit retail value for an item (all items included) in a working plan version of the category plan. It reflects the average selling price of a SKU at different product hierarchy levels in the working plan assortment.
WP Sales Var to LY U	The working plan's sales units' variance to the same in last year's actuals.
Fc Sales U	Forecasted sales retail units for a specific time period. It is generated in RCM by using AutoES libraries sourced from RDF. AutoES libraries are embedded in RCM. AutoES uses historic data to generate these forecasts. It can be scheduled periodically through batch jobs.
Fc Sales AUR	Forecasted average unit retail value of a SKU. It reflects the average selling price of a SKU at a specific product hierarchy level based on the forecast.
LY Gross Profit R	Last year's gross profit retail value (actuals) from the merchandise.
LY Gross Profit %	Last year's gross profit percentage from the merchandise.
WP Gross Profit R	The gross profit retail value from the merchandise in the working plan version of the category plan.
WP Gross Profit %	The gross profit percentage from the merchandise in the working plan version of the category plan.
WP Gross Profit var to LY R	The working plan's gross profit retail value's variance to last year's gross profit retail value actuals.
LY Sales R per Sq Ft	Last year's sales retail return per square feet. It is calculated by dividing sales retail from the merchandise by the area (or space in square feet) allocated to that particular merchandise.
WP Sales R per Sq Ft	Sales retail return per square feet in the working plan version of the category plan. It is calculated by dividing the respective sales retail value by the area (or space in square feet) allocated to that particular merchandise.
LY Gross Profit R per Sq Ft	The gross profit retail return per square feet from the merchandise in last year's assortment. It is calculated by dividing the gross profit retail value from the merchandise by the area (or space, in square feet) allocated to the merchandise.
WP Gross Profit R per Sq Ft	The gross profit retail return per square feet from the merchandise in the working plan assortment. It is calculated by dividing the gross profit retail value from the merchandise by the area (or space, in square feet) allocated to the merchandise.

## 2. Set Promo Sales Targets View

Use this view to set the promotional sales targets.

**Figure 4–55 2. Set Promo Sales Targets View**

	Ground	Instant	Single Serve	Whole
LY Sales R	98,274.8 K	48,384.5 K	10,041.0 K	21,733.1 K
LY Promo Sales R	25,219.1 K	9,636.5 K	3,721.7 K	5,780.2 K
LY Promo Sales contrib to LY Sales R	25.7 %	19.9 %	37.1 %	26.6 %
Fc Sales R	98,597.2 K	48,543.8 K	10,053.1 K	21,828.3 K
WP Sales R	98,274.8 K	48,384.5 K	10,041.0 K	21,733.1 K
WP Promo Sales R	25,219.1 K	9,636.5 K	3,721.7 K	5,780.2 K
WP Promo Sales contrib to WP Sales R	25.7 %	19.9 %	37.1 %	26.6 %
WP Promo Sales var to LY R	0.0 %	0.0 %	0.0 %	0.0 %
LY Sales U	9,445,555	4,525,630	1,461,492	1,753,695
LY Sales AUR	10.40	10.69	6.87	10.63
LY Promo Sales U	2,489,896	926,218	541,722	452,875
Fc Sales U	9,473,370	4,538,509	1,463,256	1,710,222
Fc Sales AUR	10.41	10.70	6.87	10.63
WP Sales U	9,445,555	4,525,630	1,461,492	1,753,695
LY Promo Sales AUR	10.13	10.40	6.87	10.69
WP Sales AUR	10.40	10.69	6.87	10.63
WP Promo Sales U	2,489,896	926,218	541,722	452,875
WP Promo Sales AUR	10.13	10.40	6.87	10.69
LY Gross Profit R	26,896.8 K	11,245.7 K	3,040.4 K	7,433.5 K
LY Gross Profit %	27.4 %	23.2 %	30.3 %	28.6 %
WP Gross Profit R	29,586.5 K	12,370.3 K	3,344.5 K	8,176.8 K
WP Gross Profit %	30.1 %	25.6 %	33.3 %	37.6 %
LY Assort SKU Count	0	0	0	0
LY Assort Promo SKU Count	0	0	0	0
LY Assort Promo SKU contrib to LY Assort SKU Count	0.0 %	0.0 %	0.0 %	0.0 %
WP Assort SKU Count	0	0	0	0
WP Assort Promo SKU Count	0	0	0	0
WP Assort Promo SKU contrib to WP Assort SKU Count	0.0 %	0.0 %	0.0 %	0.0 %
CP Assort SKU Count	0	0	0	0
CP Assort Promo SKU Count	0	0	0	0
CP Assort Promo SKU contrib to CP Assort SKU Count	0.0 %	0.0 %	0.0 %	0.0 %

Table 4–46 lists the measures available in this view.

**Table 4–46 2. Set Promo Sales Targets Measures**

Label	Definition
LY Sales R	Sales retail value, for a category or sub-category, per last year's actuals.
LY Promo Sales R	Last year's promotional sales retail value actuals.
LY Promo Sales contrib to LY Sales R	Promotional sales retail contribution, in percentage points, to the overall sales retail of last year's assortment.
Fc Sales R	Forecasted sales retail value for a specific time period. It is generated in RCM by using AutoES libraries sourced from RDF. AutoES libraries are embedded in RCM. AutoES uses historic data to generate these forecasts. It can be scheduled periodically through batch jobs.
WP Sales R	Sales retail value, for a category or sub-category, in the working plan version of the category plan.
WP Promo Sales R	Promotional sales retail in the working plan version of the category plan.
WP Promo Sales contrib to WP Sales R	The promotional sales retail contribution, in percentage points, to the overall sales retail of the working plan assortment.

**Table 4–46 (Cont.) 2. Set Promo Sales Targets Measures**

<b>Label</b>	<b>Definition</b>
WP Promo Sales var to LY R	The working plan's promotional sales retail value's variance to the same in last year plan's actuals.
LY Sales U	Sales units, for a category or sub-category, per last year's actuals.
LY Sales AUR	Last year's actual average unit retail value of a SKU. It reflects the average selling price of a SKU at a specific product hierarchy level based on last year's actual sales.
LY Promo Sales U	Promotional sales units in last year's assortment.
Fc Sales U	Forecasted sales retail units for a specific time period. It is generated in RCM by using AutoES libraries sourced from RDF. AutoES libraries are embedded in RCM. AutoES uses historic data to generate these forecasts. It can be scheduled periodically through batch jobs.
Fc Sales AUR	Forecasted average unit retail value of a SKU. It reflects the average selling price of a SKU at a specific product hierarchy level based on the forecast.
WP Sales U	The sales units from the merchandise in the working plan version of the category plan.
LY Promo Sales AUR	The average unit retail value for the promotional sales in a last year's assortment.
WP Sales AUR	Average unit retail value for an item (all items included) in a working plan version of the category plan. It reflects the average selling price of a SKU at different product hierarchy levels in the working plan assortment.
WP Promo Sales U	Promotional sales units in the working plan assortment.
WP Promo Sales AUR	The average unit retail value for the promotional sales in a working plan assortment.
LY Gross Profit R	Last year's gross profit retail value (actuals) from the merchandise at the category and sub-category levels.
LY Gross Profit %	Last year's gross profit percentage from the merchandise at the category and sub-category levels.
WP Gross Profit R	The gross profit retail from the merchandise in the working plan version of the category plan.
WP Gross Profit %	The gross profit percentage from the merchandise in the working plan version of the category plan.
LY Assort SKU Count	The total number of SKUs in last year's assortment.
LY Assort Promo SKU Count	The number of SKUs put on promotion in last year's assortment for the cluster.
LY Assort Promo SKU contrib to LY Assort SKU Count	The number of SKUs put on promotion in last year's assortment relative to the total number of SKUs in last year's assortment expressed in percentage points.
WP Assort SKU Count	The total number of SKUs in the working plan's assortment for the cluster.
WP Assort Promo SKU Count	The number of SKUs put on promotion in the working plan's assortment for the cluster.
WP Assort Promo SKU contrib to WP Assort SKU Count	The number of SKUs put on promotion in the working plan assortment relative to the total number of SKUs in the working plan assortment expressed in percentage points.

**Table 4–46 (Cont.) 2. Set Promo Sales Targets Measures**

Label	Definition
CP Assort SKU Count	The total number of SKUs in the current plan's assortment for the cluster.
CP Assort Promo SKU Count	The number of SKUs put on promotion in the current plan assortment for the cluster.
CP Assort Promo SKU contrib to CP Assort SKU Count	The number of SKUs put on promotion in the current plan assortment relative to the total number of SKUs in the current plan assortment expressed in percentage points.

### 3. Set Private Label Targets View

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

**Figure 4–56 3. Set Private Label Targets View**

	Ground	Instant	Single Serve	Whole
LY Sales R	98,274.8 K	48,384.5 K	10,041.0 K	21,733.1 K
LY Private Label Sales R	7,950.1 K	4,694.5 K	0.0 K	0.0 K
LY Private Label Sales contrib to LY Sales R	8.1 %	9.7 %	0.0 %	0.0 %
Fc Sales R	98,597.2 K	48,543.8 K	10,053.1 K	21,828.3 K
WP Sales R	98,274.8 K	48,384.5 K	10,041.0 K	21,733.1 K
WP Private Label Sales R	7,950.1 K	4,694.5 K	0.0 K	0.0 K
WP Private Label Sales contrib to WP Sales R	8.1 %	9.7 %	0.0 %	0.0 %
WP Private Label Sales var to LY R	0.0 %	0.0 %	0.0 %	0.0 %
LY Sales U	9,445,555	4,525,630	1,461,492	1,704,738
LY Sales AUR	10.40	10.69	6.87	10.63
LY Private Label Sales U	866,323	511,543	0	354,780
Fc Sales U	9,473,370	4,538,509	1,463,256	1,710,222
Fc Sales AUR	10.41	10.70	6.87	10.63
WP Sales U	9,445,555	4,525,630	1,461,492	1,704,738
LY Private Label Sales AUR	9.18	9.18	0.00	9.18
WP Sales AUR	10.40	10.69	6.87	10.63
WP Private Label Sales U	866,323	511,543	0	354,780
WP Private Label Sales AUR	9.18	9.18	0.00	9.18
LY Gross Profit R	26,896.8 K	11,245.7 K	3,040.4 K	7,433.5 K
LY Gross Profit %	27.4 %	23.2 %	30.3 %	34.2 %
LY Private Label Gross Profit R	3,942.3 K	2,244.2 K	0.0 K	0.0 K
LY Private Label Gross Profit %	49.6 %	47.8 %	0.0 %	0.0 %
WP Gross Profit R	29,586.5 K	12,370.3 K	3,344.5 K	8,176.8 K
LY Private Label Gross Profit contrib to LY Gross Profit R	14.7 %	20.0 %	0.0 %	0.0 %
WP Gross Profit %	30.1 %	25.6 %	33.3 %	37.6 %
WP Private Label Gross Profit R	0.0 K	0.0 K	0.0 K	0.0 K
WP Private Label Gross Profit %	0.0 %	0.0 %	0.0 %	0.0 %
WP Private Label Gross Profit contrib to WP Gross Profit R	0.0 %	0.0 %	0.0 %	0.0 %
WP Private Label Gross Profit var to LY R	-100.0 %	-100.0 %	0.0 %	-100.0 %
LY Assort SKU Count	0	0	0	0
LY Assort Private Label SKU Count	0	0	0	0
LY Assort Private Label SKU contrib to LY Assort SKU Count	0.0 %	0.0 %	0.0 %	0.0 %
WP Assort SKU Count	0	0	0	0
WP Assort Private Label SKU Count	0	0	0	0
WP Assort Private Label SKU contrib to WP Assort SKU Count	0.0 %	0.0 %	0.0 %	0.0 %

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

**Table 4–47 3. Set Private Label Targets Measures**

<b>Label</b>	<b>Definition</b>
LY Sales R	Sales retail value, for a category or sub-category, per last year's actuals.
LY Private Label Sales R	Sales retail value from private label merchandise, for a category or sub-category, per last year's actuals.
LY Private Label Sales contrib to LY Sales R	Sales retail contribution of private label items to the overall sales retail of last year's assortment expressed in percentage points.
Fc Sales R	Forecasted sales retail value for a specific time period. It is generated in RCM by using AutoES libraries sourced from RDF. AutoES libraries are embedded in RCM. AutoES uses historic data to generate these forecasts. It can be scheduled periodically through batch jobs.
WP Sales R	The working plan assortment's sales retail value.
WP Private Label Sales R	The private label items' sales retail value in a working plan assortment.
WP Private Label Sales contrib to WP Sales R	The sales retail contribution of private label items to the overall sales retail of the working plan assortment expressed in percentage points.
WP Private Label Sales var to LY R	Variance in sales retail value from private label merchandise in working plan version of the category plan to last year's actuals.
LY Sales U	Sales units, for a category or sub-category, per last year's actuals.
LY Sales AUR	Last year's actual average unit retail value of a SKU. It reflects the average selling price of a SKU at a specific product hierarchy level based on last year's actual sales.
LY Private Label Sales U	Sales units from private label merchandise in last year's actuals.
Fc Sales U	Forecasted sales retail units value for a specific time period. It is generated in RCM by using AutoES libraries sourced from RDF. AutoES libraries are embedded in RCM. AutoES uses historic data to generate these forecasts. It can be scheduled periodically through batch jobs.
Fc Sales AUR	Forecasted average unit retail value of a SKU. It reflects the average selling price of a SKU at a specific product hierarchy level based on the forecast.
WP Sales U	The sales units from the merchandise in the working plan version of the category plan.
LY Private Label Sales AUR	Average unit retail value of private label merchandise in last year's actuals.
WP Sales AUR	Average unit retail value for an item (all items included) in a working plan version of the category plan. It reflects the average selling price of an SKU at different product hierarchy levels in the working plan.
WP Private Label Sales U	Sales units, for a category or sub-category, from private label merchandise in the working plan version of the category plan.
WP Private Label Sales AUR	Average unit retail value of the private label merchandise in a working plan version of the category plan.
LY Gross Profit R	Last year's gross profit retail value (actuals) from the merchandise at the category and sub-category levels.
LY Gross Profit %	Last year's gross profit percentage from the merchandise at the category and sub-category levels.

**Table 4–47 (Cont.) 3. Set Private Label Targets Measures**

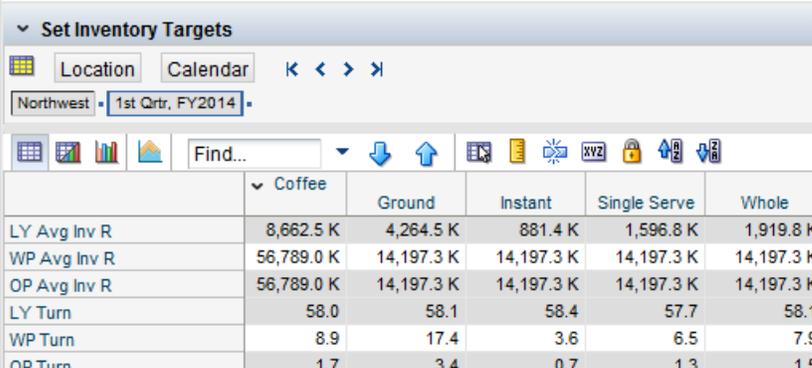
<b>Label</b>	<b>Definition</b>
LY Private Label Gross Profit R	Gross profit retail from private label merchandise in a last year's actuals presented at the category or sub-category level.
LY Private Label Gross Profit %	Gross profit percentage from private label merchandise in a last year's actuals presented at the category or sub-category level.
WP Gross Profit R	The gross profit retail from the merchandise in the working plan version of the category plan.
LY Private Label Gross Profit contrib to LY Gross Profit R	Gross profit retail contribution of private label items to the overall gross profit retail of last year's assortment expressed in percentage points.
WP Gross Profit %	The gross profit percentage from the merchandise in the working plan version of the category plan.
WP Private Label Gross Profit R	Gross profit retail value of private label merchandise in the working plan version of the category plan.
WP Private Label Gross Profit %	Gross profit retail percentage of private label merchandise in the working plan version of the category plan.
WP Private Label Gross Profit contrib to WP Gross Profit R	The gross profit retail contribution of private label items to the overall gross profit retail of the working plan expressed in percentage points.
WP Private Label Gross Profit var to LY R	The working plan's private label items' gross profit retail's variance to the same in last year plan's actuals.
LY Assort SKU Count	The total number of SKUs in last year's assortment.
LY Assort Private Label SKU Count	The number of private label SKUs in the last year's assortment for the cluster.
LY Assort Private Label SKU contrib to LY Assort SKU Count	The number of private label SKUs in last year's assortment relative to the total number of SKUs in last year's assortment expressed in percentage points.
WP Assort SKU Count	The total number of SKUs in the working plan's assortment for the cluster.
WP Assort Private Label SKU Count	The number of private label SKUs in the working plan's assortment for the cluster.
WP Assort Private Label SKU contrib to WP Assort SKU Count	The number of private label SKUs in the working plan assortment relative to the total number of SKUs in the working plan assortment expressed in percentage points.
CP Assort SKU Count	The total number of SKUs in the current plan's assortment for the cluster.
CP Assort Private Label SKU Count	The number of private label SKUs in the current plan assortment for the cluster.
CP Assort Private Label SKU contrib to CP Assort SKU Count	The number of private label SKUs in the current plan assortment relative to the total number 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 targets for inventory.

**Figure 4–57 Set Inventory Targets View**


	Coffee	Ground	Instant	Single Serve	Whole
LY Avg Inv R	8,662.5 K	4,264.5 K	881.4 K	1,596.8 K	1,919.8 K
WP Avg Inv R	56,789.0 K	14,197.3 K	14,197.3 K	14,197.3 K	14,197.3 K
OP Avg Inv R	56,789.0 K	14,197.3 K	14,197.3 K	14,197.3 K	14,197.3 K
LY Turn	58.0	58.1	58.4	57.7	58.1
WP Turn	8.9	17.4	3.6	6.5	7.9
OP Turn	1.7	3.4	0.7	1.3	1.5

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

**Table 4–48 Set Inventory Targets Measures**

Label	Definition
LY Avg Inv R	Average inventory retail value or stock retail value carried by the category or sub-category per last year's actuals. Average inventory retail value represents an average retail value of merchandise bought, received, and carried by the retailer before it gets sold at any point in time. This average inventory retail value is generally calculated on a weekly basis or monthly basis to get an understanding of the money invested in inventory or buying merchandise.
WP Avg Inv R	Average inventory retail value to be carried by a category or sub-category in given planning period, per the category plan's working plan version.
OP Avg Inv R	Average inventory retail value to be carried by a category or sub-category per the approved category plan or original plan.
LY Turn	Inventory turns per last year's actuals. It reflects the number of times the average inventory carried can be sold over a specified period of time.
WP Turn	Inventory turns in the working plan version of the category plan. It reflects the number of times the average inventory carried can be sold over a specified period of time.
OP Turn	Inventory turns in the approved category plan or original plan. It reflects the number of times the average inventory carried can be sold over a specified period of time.

## Approve Tab

Use this tab to approve the assortment. On approval, the category plan targets, roles, strategies, and tactics are shared with assortment planning and MSO. Also on approval, the working plan (WP) numbers are copied to original plan (OP). Once approved, the original plan (OP) is directly committed to the database.

The original plan is then communicated to assortment planning process in the form of targets (denoted by a prefix of Tgt). The plan is time-stamped and includes user information.

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

## Approve Assortment Strategies, Tactics, and Scorecard View

This view contains the Approve custom menu option.

This view exists at the following hierarchy levels or higher:

- Category
- Trading Area
- Quarter

**Figure 4–58 Approve Assortment Strategies, Tactics, and Scorecard View**

	WP Approve to OP	WP Approve to OP Comment	WP Approve to OP Date	WP Approve to OP By
Baby Food	<input type="checkbox"/>			
Canned Vegetables	<input type="checkbox"/>			
Coffee	<input type="checkbox"/>	smoke	02/02/2014	adm
Cookies	<input type="checkbox"/>			
Juice	<input type="checkbox"/>			
Pasta	<input type="checkbox"/>			
Salty Snacks	<input type="checkbox"/>			

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 category plan for the approval seeker to take a note of while executing the plan or working on other plans.
WP Approve OP Date	The date of approval of a working plan to an original plan.
WP Approve to OP By	The approver's ID which is used to approve a working plan to an original plan.

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## Macro Space Optimization @Dept Task

The Macro Space Optimization @Dept task is used to allocate optimum space to the departments in a store.

### Introduction to Macro Space Optimization

Macro Space Optimization (MSO) is used in Category Management to allocate optimum space to a department or sub-category. Just as with merchandise buying budgets, space is a key resource in Category Management. It has a cost associated to it and needs to be utilized efficiently.

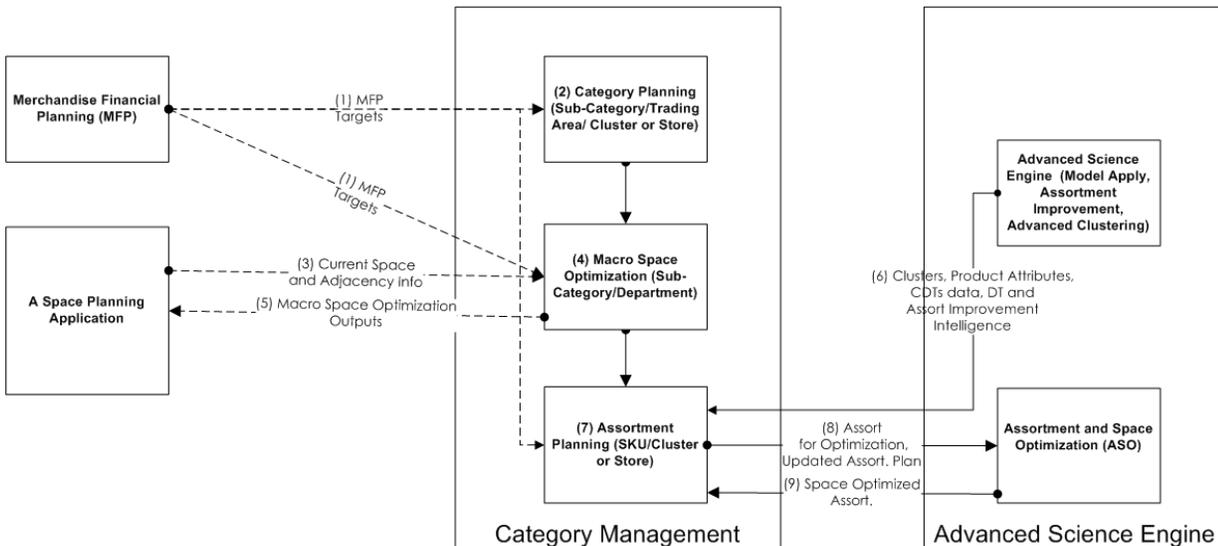
Space in MSO context refers to the floor area, fixture-space, and shelf-space at the stores used to display merchandise in the selling area. The unit of measure for space can be linear units (feet, meters, and so on), square units (square feet, square meters, and so on), or cubic units (cubic feet, cubic meters, and so on). This needs to be defined at the time of application installation.

Optimal space allocation is based on the following two principles:

- Gross profit maximization from the available space at the retailer.
- Optimal space allocation for a fixed gross profit goal.

Before beginning Macro Space Optimization, the following requirements should be met:

- An approved category plan should be in place.
- A merchandise financial plan needs to be imported from Oracle Retail Merchandise Financial Planning (MFP).
- Planograms (POGs) should be prepared.
- Current space information needs to be imported from a space planning application.
- Space profit tables should be available.

**Figure 5–1 Category Management Process Flow**

Space Profit tables form the basis of MSO and are maintained by an administrator. These tables are used to store a relationship between the allocated space and respective gross profit returns at the retailer based on historic data. Space Profit tables are also referred to as space profit elasticity curves, which are derived using Advanced Science algorithms.

MSO can be conducted at the store, cluster, or trading area level. It uses an algorithm, which runs at the store level, to recommend optimum space to a department and sub-category. At the cluster and trading area levels, the recommendations are presented by aggregating data from the store level.

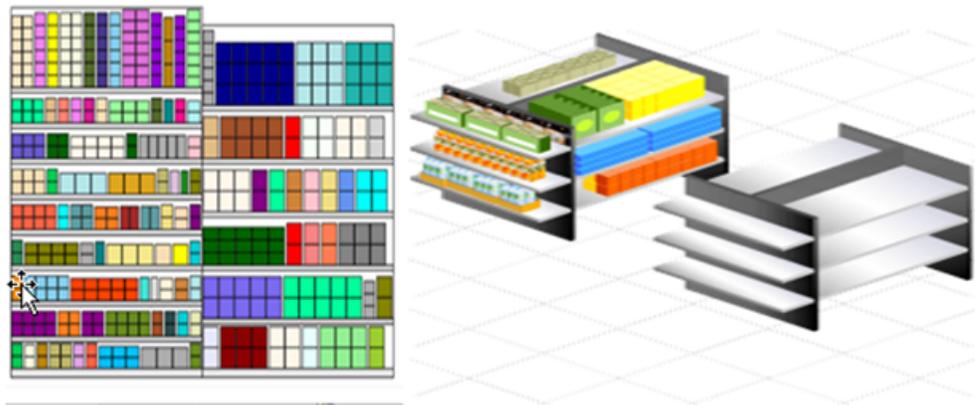
For more information on Space Profit tables, see "[Manage MSO Tables Step](#)" in [Chapter 3](#).

Note that MSO is conducted prior to the assortment planning and optimization activity so that the assortment plans can be made in alignment with the allotted space to sub-categories.

MSO uses the Planogram (POG) hierarchy in place of the traditional Product (PROD) hierarchy. The POG hierarchy represents the store layout; the way a store's selling area is structured and depicts the front-end of the store as presented to the customer. Therefore, there is a need to transform PROD hierarchy-based targets to the POG hierarchy and transform the POG hierarchy-based optimization results to the PROD hierarchy.

A POG is a visual diagram indicating the placement of products on shelves and fixtures in a store, so as to utilize the available space optimally and catalyze customer purchases. Planograms are used to define how different products are physically merchandised in a store.

The images in the following figure show a sample POG and actual product shelves used to physically merchandise the products in a store.

**Figure 5–2 Planogram and Product Shelves in a Store**

The POG hierarchy defines the way products need to be physically merchandised in a store. There are three levels of the POG hierarchy defined in the application:

- POG Department
- POG Category
- POG Sub-Category

These levels are synonymous with Department, Category (or Class), and Sub-Category (or Sub-Class) in a product hierarchy.

Retailers tend to use a planogram hierarchy when merchandising a store, as opposed to the product hierarchy, although these are often very similar. For example, within a grocery department, the dairy category may include milk, eggs, and butter, but these would likely be merchandised completely separately, owing to the different types of fixture that each requires. Within an electrical retailer, printers and print cartridges would likely be different categories, but they would often be merchandised in the same planogram.

In effect, planograms used vary from retailer to retailer. They depend on the type of retail format, customer shopping patterns, type of merchandise, and product packaging.

The POG Department represents the distinct department zones in a store, which broadly demarcate different types of merchandise being sold at the store. Department zones help customers to locate the merchandise they want to buy when they enter a store. For example, in a grocery store, the bakery department would segregate an area within the store that contained all the bakery planograms.

The next two levels in the POG hierarchy, POG Category and POG Sub-Category, are defined on the basis of planograms used in the store.

Planograms can be defined at either the category or sub-category level. Some retailers define their planograms at sub-category level, which makes it easier to create more assortments for the category, by combining the sub-category planograms. For example, ground coffee and instant coffee can use the same planogram, which means they are represented by a single, combined POG sub-category level.

Others develop their planograms at the category level which requires more work in creating the various category assortments; however, it does give greater flexibility in merchandising products from different sub-categories in the same planogram without any constraint on the bay boundaries such as in the case of sub-category level planograms. In such scenarios, ORASE comes in handy in optimizing the assortments to the available space or the planograms to come out with actionable assortments.

For example, in the Beverages department, there may be a single planogram being used for the categories tea and coffee. So, in effect there is one combined POG hierarchy level for them.

MSO can optimize at the department level, where it works in square units (square feet or square meters), and at the sub-category level, where it works in linear units (feet or metres). This needs to be taken into consideration when defining the planogram hierarchy.

The mapping between the PROD and POG hierarchies is defined in the Category Management Administration task. This mapping information is then used in the task flow to transform product hierarchy-based targets (from the Category Planning task and MFP application) into POG hierarchy-based targets.

MSO can be performed at two levels in Category Management:

- POG Department level using the Macro Space Optimization @Dept task. This task is used to allocate optimum space to the departments from the overall floor area used as selling space at the store. The results here directly impact the layout of the store in terms of which department zone gets how much space, specifications of shelves and fixtures, how broad and wide assortments under a department can be, and so on. Space is measured in square units at the department level.
- POG Sub-Category level using the Macro Space Optimization @Sub-Category task. This task is used to allocate optimum space to the sub-categories under a specific department from the overall space available for the department. The results here directly impact the design and specifications of planograms. Space is measured in linear units at the sub-category level.

Once space allocation has been finalized for the POG departments, optimization is performed at the sub-category level.

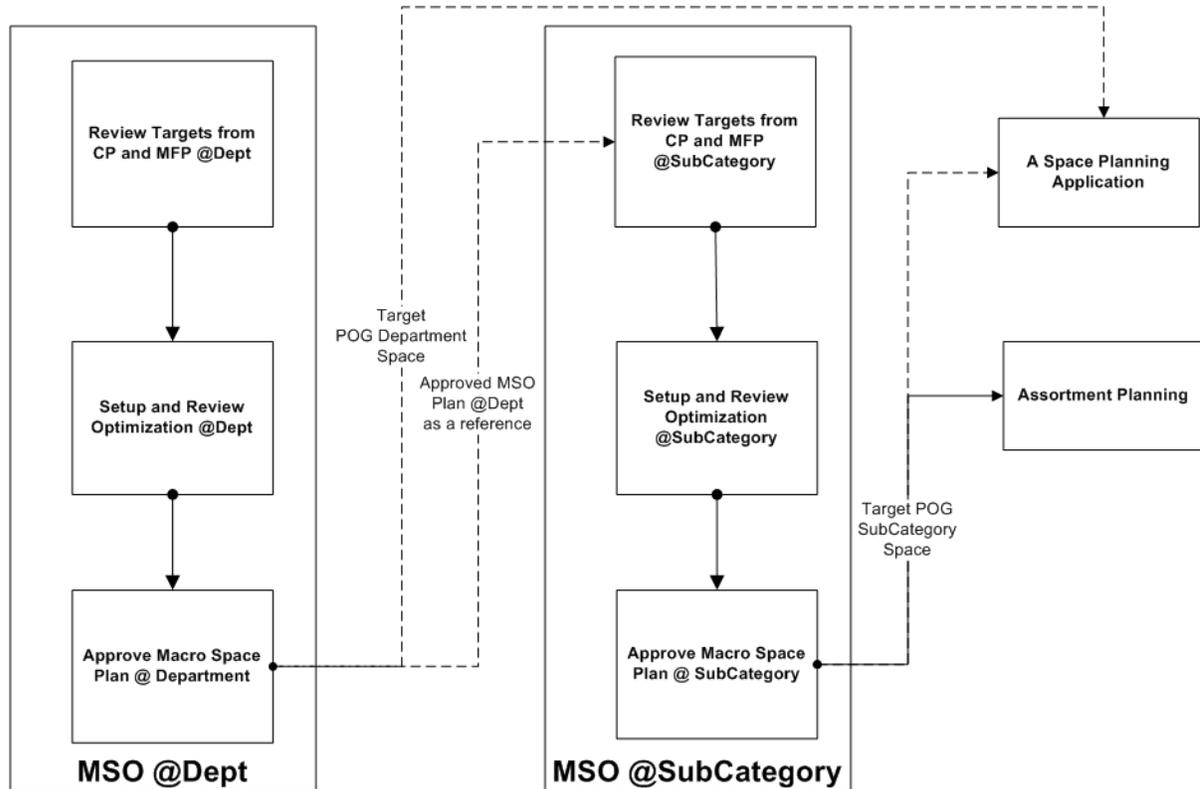
In general, the MSO process at both the POG department and POG sub-category levels consists of the following steps:

1. Review the targets from Category Planning and MFP.
2. Set the optimization constraints and review the optimization results.
3. Approve the optimization results.

The following flowchart shows the MSO process flow in RCM:

1. Start with MSO at the department level.
2. Check the department level optimization results referred by a space management system and MSO @ Sub-Category.
3. Perform MSO at the sub-category level.
4. Share the sub-category level optimization results with the assortment planning and optimization process.

Figure 5–3 Macro Space Optimization Process Flow



This task has the following steps:

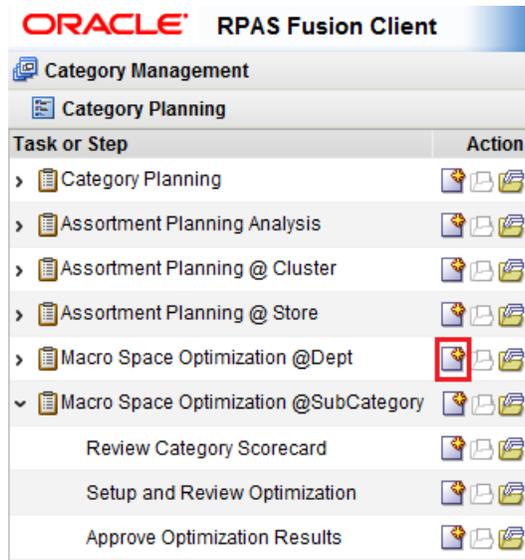
- Review Category Scorecard Step
- Setup and Review Optimization Step
- Approve Optimization Results Step

## Create the Macro Space Optimization @Dept Workbook

To create the workbook:

1. Select the **New Workbook** icon in the Macro Space Optimization @Dept task.

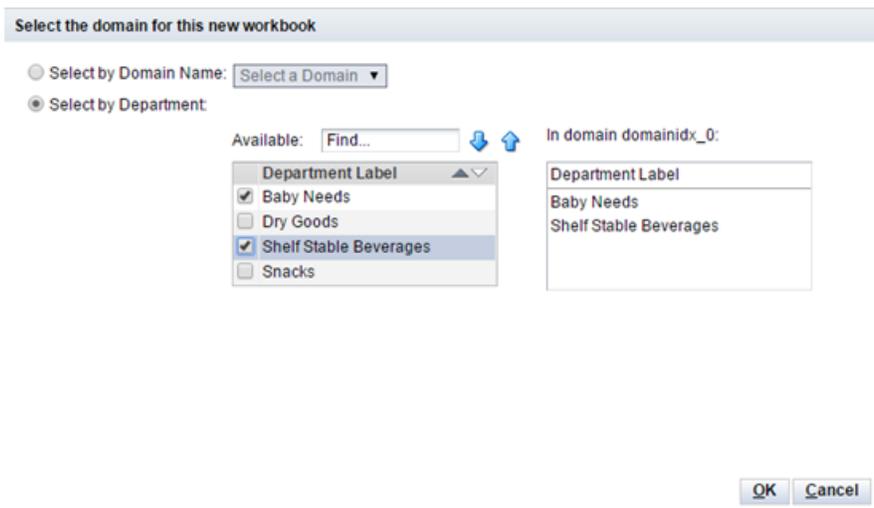
**Figure 5–4 Macro Space Optimization @Dept Task**



The workbook wizard opens.

2. Select the domain name or departments. Click **Next**.

**Figure 5–5 Workbook Wizard Select Domain or Departments Page**



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

**Figure 5–6 Workbook Wizard Select Quarter Page**

The screenshot shows the 'Workbook Wizard' interface with the 'Select Quarter' step. The 'Available Items' list on the left contains the following items:

Label
1st Qtr, FY2011
2nd Qtr, FY2011
3rd Qtr, FY2011
4th Qtr, FY2011
1st Qtr, FY2012
2nd Qtr, FY2012
3rd Qtr, FY2012
4th Qtr, FY2012
1st Qtr, FY2013
2nd Qtr, FY2013
3rd Qtr, FY2013
4th Qtr, FY2013
1st Qtr, FY2014
2nd Qtr, FY2014
3rd Qtr, FY2014
4th Qtr, FY2014
1st Qtr, FY2015

The 'Selected Items' list on the right contains:

Label
4th Qtr, FY2014

Buttons between the lists: Add, Add All, Remove, Remove All. Bottom buttons: Cancel, Previous, Next, Finish.

4. Select the trading areas and move them to the Selected Items box. Click **Finish**.

**Figure 5–7 Workbook Wizard Select Trading Area Page**

The screenshot shows the 'Workbook Wizard' interface with the 'Select Trading Area' step. The 'Available Items' list on the left contains the following items:

Label
e-commerce USA
Northeast
Northwest
Southeast
Southwest

The 'Selected Items' list on the right contains:

Label
Northwest

Buttons between the lists: Add, Add All, Remove, Remove All. Bottom buttons: Cancel, Previous, Next, Finish.

The workbook is created.

## Review Category Scorecard Step

Use this step to review the Category Scorecard. The Category Scorecard presents the Category Plan and Merchandise Financial Plan details.

Use the targets and goals (in the form of sales, gross profit, average inventory, turns, and so on) set as part of Category Planning and/or Merchandise Financial Planning as a reference while defining the constraints for MSO in order to generate the results at the POG Department level.

The Category Scorecard is presented on the POG hierarchy in MSO tasks, unlike in other tasks such as Category Planning and Assortment Planning, where it is presented

on the PROD hierarchy. The target plan information available on the PROD hierarchy needs to be transformed into the POG hierarchy.

The mapping between the PROD and POG hierarchies is maintained in Category Management Administration and is used to transform product hierarchy based targets (from the Category Planning task and MFP application) into POG hierarchy based targets.

Example of product to POG hierarchy transformation: In a convenience format store, in the PROD hierarchy, categories or sub-categories, such as butter and cheese, may be mapped to the Dairy Products department, but in the POG hierarchy classification, they are mapped to the Frozen Products POG Department or Department Zone. In such a scenario, the mapping needs to be defined between the PROD and the POG hierarchies in the Category Management Administration workbook.

**Prior to starting this step:**

- An approved Category Plan should be available.
- A Merchandise Financial Plan should be available and must be imported into RCM.
- PROD to POG hierarchy mapping should be defined in Category Management Administration.
- Like Sub-Category mapping should be done in Category Management Administration in case new sub-categories are introduced.

**After completing this step:**

Proceed to the next step, Setup and Review Optimization, to run MSO.

This step has one view.

## Custom Menu Option

Use the Transform PROD to POG Hierarchy custom menu to transform the category plan and merchandise financial plan from the PROD hierarchy to the POG hierarchy to see the targets at the POG Department level.

Note that all the activities in the MSO tasks are done on the POG hierarchy only. Therefore, there is a need to transform (or convert) the PROD hierarchy based targets (received from the Category Planning task and MFP application) to POG hierarchy based targets.

## Review Category Scorecard @Dept View

Use this view to review the approved category plan and merchandise financial plan targets. The targets are in the form of Sales R, Sales Units, Gross Profit R, Average Inventory, Turns, and so on, sourced from the Category Planning task (OP measures) and MFP application (MFP measures).

The idea is to align the allocation of space to departments in MSO to these business plans.

The measures constituting a category plan and merchandise financial plan are available on the PROD hierarchy and need to be mapped to the POG hierarchy in this view.

After checking the WP Transform PROD to POG flag measure, run the Transform PROD to POG Hierarchy custom menu to populate the plan measures in this view on the POG hierarchy at the POG Department level.

Figure 5–8 shows an example presenting different measures sourced from the Category Planning task in RCM and MFP application.

**Figure 5–8 Review Category Scorecard @Dept View**

	Baby	Bakery	Beverages	Drygoods	Fresh	Frozen	Health & Beauty	Household	Newsstand	Pet Care
WP Transform PROD to POG	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>						
MD WP Sales R	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K
MD MFP Sales R	0.0 K	0.0 K	195,514.5 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K
OP Sales R	0.0 K	0.0 K	181,536.1 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K
MD LY Sales R	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K
MD WP Sales U	0	0	0	0	0	0	0	0	0	0
MD MFP Sales U	0	0	34,405,491	0	0	0	0	0	0	0
OP Sales U	0	0	17,420,399	0	0	0	0	0	0	0
MD LY Sales U	0	0	0	0	0	0	0	0	0	0
MD WP Sales AUR	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
MD MFP Sales AUR	0.00	0.00	5.68	0.00	0.00	0.00	0.00	0.00	0.00	0.00
OP Sales AUR	0.00	0.00	10.42	0.00	0.00	0.00	0.00	0.00	0.00	0.00
MD LY Sales AUR	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
MD WP Gross Profit R	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K
MD MFP Gross Profit R	0.0 K	0.0 K	45,687.5 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K
OP Gross Profit R	0.0 K	0.0 K	69,410.9 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K
MD LY Gross Profit R	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K
OP Promo Sales R	0.0 K	0.0 K	43,110.1 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K
OP Promo Sales U	0	0	5,434,174	0	0	0	0	0	0	0
OP Promo Sales AUR	0.00	0.00	7.93	0.00	0.00	0.00	0.00	0.00	0.00	0.00
OP Private Label Sales R	0.0 K	0.0 K	83,836.1 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K
OP Private Label Sales U	0	0	6,603,018	0	0	0	0	0	0	0
OP Private Label Sales AUR	0.00	0.00	12.54	0.00	0.00	0.00	0.00	0.00	0.00	0.00
OP Private Label Gross Profit R	0.0 K	0.0 K	-0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K	0.0 K

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

**Table 5–1 Review Category Scorecard @Dept View Measures**

Label	Description
MD WP Transform PROD to POG	Flag measure which should be checked prior to running the Transform PROD to POG Hierarchy custom menu.
MD WP Sales R	Working plan's sales retail value defined on the POG hierarchy for the POG Department. An LY version of this measure (MD LY Sales R) is also available.
MD WP Sales U	Working plan's sales units defined on the POG hierarchy for the POG Department. An LY version of this measure (MD LY Sales U) is also available.
MD WP Sales AUR	Working plan's average unit retail value defined on the POG hierarchy for the POG Department. An LY version of this measure (MD LY Sales AUR) is also available.
MD WP Gross Profit R	Working plan's gross profit value defined on the POG hierarchy for the POG Department. An LY version of this measure (MD LY Gross Profit R) is also available.
OP Sales R	Approved category plan's (referred to as original plan) sales retail value. It is shared as a target with assortment planning and MSO.
OP Sales U	Original plan assortment's (approved category plan's) sales units. It is used in assortment planning and MSO as the target sales units.
OP Gross Profit R	Original plan assortment's (approved category plan's) gross profit value. It is used in assortment planning and MSO as the target gross profit retail value.
OP Sales AUR	Original plan assortment's (approved category plan's) average unit retail value. It is used in assortment planning and MSO as the target average unit retail value.

**Table 5-1 (Cont.) Review Category Scorecard @Dept View Measures**

<b>Label</b>	<b>Description</b>
OP Promo Sales R	Original plan's (approved category plan's) promotional sales retail value. It is used in assortment planning and MSO as the target promo sales retail value.
OP Promo Sales U	Original plan's (approved category plan's) promotional sales units. It is used in assortment planning and MSO as the target promo sales units.
OP Promo Sales AUR	Original plan's (approved category plan's) average unit retail value. It is used in assortment planning and MSO as the target average unit retail value.
OP Private Label Sales R	Original plan's (approved category plan's) sales retail value from private label products. It is used in assortment planning and MSO as the target sales retail value for private label products.
OP Private Label Sales U	Original plan's (approved category plan's) sales units from private label products. It is used in assortment planning and MSO as the target sales units for private label products.
OP Private Label Sales AUR	Original plan's (approved category plan's) average unit retail value from private label products. It is used in assortment planning and MSO as the target average unit retail value for private label products.
OP Private Label Gross Profit R	Original plan's (approved category plan's) gross profit retail value from private label products. It is used in assortment planning and MSO as the target gross profit retail value for private label products.
OP Avg Inv R	Original plan's (approved category plan's) average inventory retail value carried. It is used in assortment planning and MSO as the target average inventory retail value.
OP Turn	Original plan's (approved category plan's) turns. Turns represent the number of times the average inventory carried can be sold over in a specified period of time. This measure is used in assortment planning and MSO as the target average inventory retail value.
MD WP Sales C	Working plan's sales cost value defined on the POG hierarchy for the POG Department. An LY version of this measure (MD LY Sales C) is also available.

**Custom Menu**

Use the Transform PROD to POG Hierarchy custom menu in this view to transform the PROD hierarchy based plan (Category Plan and Merchandise Financial Plan) measures to the respective POG hierarchy measures at the POG Department level.

This custom menu utilizes the mapping defined between the PROD and POG hierarchies in Category Management Administration to come up with the POG-based plan measure values.

Note that the measures in this view are only populated after the custom menu runs.

**Setup and Review Optimization Step**

Use this step to run MSO and review the optimization results.

MSO is used to derive and allocate optimum space to department zones or POG departments in a store. An algorithm (in the form of a special expression ASOSpace) is used through a custom menu trigger to identify the appropriate space and

corresponding profit, keeping the constraints set in this view under consideration. Space and Profit tables, containing data on space to profit variance (based on historic data), are utilized by the algorithm and form the basis of the optimization results.

There are two types of MSO:

- Space-based: For a given set of space constraints, optimization recommends the maximum profit.
- Financial parameter-based: For a given set of gross profit targets, optimization recommends the optimum space.

MSO can be run at the store, store cluster, or trading area level for a set of POG Departments or Department Zones at a store.

To run MSO and review the results:

1. Set the constraints for optimization mechanics:
  - Optimization Type and Target Alignment Type: There are two types of optimization: Space-based and Financial parameter-based. The space-based optimization type has the target alignment type of Less than or Equal to. For Financial parameter-based, the two options include Max Profit Up and Max Profit Down. The combined options include:
    - Space - Less than or Equal to
    - Financial - Max Profit Up
    - Financial - Max Profit Down
  - Financial Target Metric and Optimization Method: Optimization can be based on the different financial target metrics which include MFP Gross Profit R and OP Gross Profit R. There is one optimization method available: Optimal.
2. Set space constraints:
  - Upper guard rail % or Upper guard rail space: Upper guard rail space is used in optimization to define the upper limit of space allocation for any POG Department, so as to keep the optimization results within an upper bound value of space. It can be defined as a percentage of the current space.
  - Lower guard rail % or Lower guard rail space: Similar to the Upper guard rail, Lower guard rail space is defined as the lower limit of space allocation for any POG Department and can also be defined as a percentage of current space.
  - Max and min space: Max and min space values represent the highest upper limit and lowest limit of space that can be made available to any POG Department. Optimization process picks the lower of the max space and upper guard rail space and the higher of the min space and lower guard rail space as inputs while setting the range of optimization results.
  - Current space, total available space and space increments for POG Departments: Current space represents the space allocated to any POG Department in the current store layout. Total available space represents the total selling area of the store. Space increments are based on the shelves and fixtures specifications for different POG Departments, which determine the minimum length by which current space can be changed for a specific POG Department.
3. Set the optimization scope per the business requirements:
  - a. Select the POG Departments to be included in the optimization.
  - b. Lock the current space for the POG Departments, if required.

- c. Select the mandatory POG Departments. Mandatory POG Departments should definitely be part of the final assortment. Checking the mandatory flag for a POG Department ensures that it gets a higher priority in space allocation from the available space.
4. After setting the constraints, run the Optimize Dept custom menu.
5. Review the optimization results in the form of recommended space and respective gross profit by comparing them with the set space constraints and targets in the Category Scorecard.
6. Review the optimization results in the form of histograms.

**Prior to starting this step:**

- Review the targets in the Category Scorecard.
- Ensure that the Space Profit tables are populated.

**After completing this step:**

Proceed to the Approve Optimization Results step to approve the optimization results.

This step has the following views:

- [1. Setup and Review Optimization @ Dept View](#)
- [2. Review Space and Profit Histograms @Dept View](#)

## Custom Menu Option

Use the Optimize Dept custom menu to run the optimization at the POG Department level once all the constraints have been defined.

### 1. Setup and Review Optimization @ Dept View

Use this view to do the following:

- Set the constraints for MSO for the POG Departments or departments in the store.
- Run MSO using the Optimize Dept custom menu.
- Review the results from the optimization in the form of recommended space and gross profit retail.

Define the following constraints:

- Constraints for Optimization Mechanics: These constraints define mechanics of the MSO run. The measures that need to be defined are: MD WP Optimization and Target Alignment Type, MD WP Financial Target Metric, and MD WP Optimization Method.
- Space constraints: Space constraints define the range (upper and lower limits) of space allocation, current space of a POG Department, and total available selling space at the store. The measure list to be defined here consists of: MD WP Total Available Space Square Units, MD WP Space Increment, MD WP Current Space Square Units, MD WP Min. Space, MD WP Max. Space, MD WP Lower Guard Rail %, MD WP Upper Guard Rail %, MD WP Lower Guard Rail Space, and MD WP Upper Guard Rail Space.

The optimization algorithm triggered by the custom menu picks the following inputs when it comes to determining the range of space allocation:

- The lower limit of the space allocation range is the higher value of the two measures: MD WP Max. Space and MD WP Upper Guard Rail Space.
- The upper limit of the space allocation range is the lower value of the two measures: MD WP Min. Space and MD WP Lower Guard Rail Space.

Optimization Scope constraints: This set of measures is used to define the scope of MSO for the POG Departments in a store. The measures that need to be defined here consist of the following flag measures: MD WP Include POG Department, MD WP Lock Space, and MD WP Mandatory.

For information on the measure definitions, see [Table 5-2](#).

This view should be viewed at the POG Department and all Planogram level in outline view mode. Optimization can be run at the following levels:

- Store, cluster, or trading area level on the location hierarchy.
- Quarter, Half Year, or Year level.

[Figure 5-9](#) shows an example of this view with the constraints set and optimization results derived at the POG Department level.

**Figure 5-9 1. Setup and Review Optimization @ Dept View**

[Table 5-2](#) lists the measures available on this view.

**Table 5-2 1. Setup and Review Optimization @ Dept View Measures**

Label	Description
MD WP Optimization Target and Alignment Type	Used to define the type of MSO and type of target alignment from a drop-down selection. The following options are available for selection: Space - Less than or Equal to, Financial - Max Profit Up, and Financial - Max Profit Down.
MD WP Financial Target Metric	Used to assign the target metric to be used as the basis for MSO. The options available are: MFP Gross Profit R and OP Gross Profit R.
MD WP Optimization Method	Method adopted by MSO is defined through this measure. There is one optimization method available: Optimal.
MD WP Total Available Space Square Units	Represents the total available space of the stores in square units used to allocate space to the POG Departments in the upcoming space plan or working plan.

**Table 5–2 (Cont.) 1. Setup and Review Optimization @ Dept View Measures**

<b>Label</b>	<b>Description</b>
MD WP Space Increment	Represents the incremental value of space in square units by which the space should be increased or decreased for a POG Department. This is based, in general, on the shelves and fixture specifications used in the department and store.
MD WP Current Space Square Units	Represents the current space, in square units, assigned to a POG Department at a store.
MD WP Include POG Department	Flag measure used to mark the POG Departments which should participate in MSO for space allocation.
MD WP Lock Space	Flag measure used to lock space for a POG Department in the MSO run. It is used to maintain the current space allotted to the POG Department in the upcoming space plan or working plan. The current space of the locked POG Department is deducted from the total available space to calculate the effective total available space used for allocating space for the rest of the POG Departments participating in MSO.
MD WP Mandatory	Flag measure used to mark the mandatory POG Departments, which should be given higher priority in space allocation from the total available space by MSO.
MD WP Lock Space Selection Error	Measure used to present the error messages if the Lock Space measure is checked for a POG Department without including the POG Department (through Include flag measure) for the MSO run.
MD WP Mandatory Selection Error	Measure used to present the error messages if the Mandatory measure is checked for a POG Department without including the POG Department (through Include flag measure) for the MSO run.
MD WP Min. Space	Minimum amount of space that can be allocated to a POG Department.
MD WP Max. Space	Maximum amount of space that can be allocated to a POG Department.
MD WP Lower Guard Rail %	User-defined lower limit space percentage output for a POG Department required from an optimization run. It is expressed as an absolute percentage of current space of a POG Department. It is used to control the lower limit of recommended space output for a POG Department, from an optimization run, so as to keep it within the range per the business requirements.
MD WP Upper Guard Rail %	User-defined upper limit space percentage output for a POG Department required from an optimization run. It is expressed as an absolute percentage of the current space of a POG Department. It is used to control the upper limit of recommended space output for a POG Department, from an optimization run, so as to keep it within the range per the business requirements.
MD WP Lower Guard Rail Space	User-defined lower limit space output for a POG Department required from the optimization run. It can be directly entered or calculated on the basis of MD WP Lower Guard Rail %. It is used to control the lower limit of recommended space output from an optimization run, so as to keep it within the range per the business requirements.

**Table 5–2 (Cont.) 1. Setup and Review Optimization @ Dept View Measures**

<b>Label</b>	<b>Description</b>
MD WP Upper Guard Rail Space	User-defined upper limit space output for a POG Department required from the optimization run. It can be directly entered or calculated on the basis of MD WP Upper Guard Rail %. It is used to control the upper limit of recommended space output from an optimization run, so as to keep it within the range per the business requirements.
MD WP Space Result String	Measure used to present the error messages applicable at the aggregate level in an optimization run. For example: Max Capacity is invalid.
MD WP Sub Result String	Measure used to present the specific error messages in the optimization run. It specifically points to the POG Department where some user-defined constraints are off-the-mark. For example: Invalid Min Max Constraints for a specific POG Department.
MD WP Recommended Space	Recommended space output for a POG Department from an MSO run corresponding to the recommended gross profit retail. The CP version of the measure is used to store the approved results.
MD WP Space Change	Difference between the recommended space and current space for a POG Department.
MD WP Recommended Gross Profit R	Recommended gross profit retail output for a POG Department from an MSO run corresponding to the recommended space. CP version of the measure is used to store the approved results.
MD WP Gross Profit Change	Difference between the recommended gross profit and working plan gross profit retail for a POG Department.

### **Custom Menu**

This view supports the Optimize Dept custom menu, which is used to run MSO at the POG Department level. All the POG Departments or Department Zones in the stores are allocated space using this custom menu. This custom menu utilizes an embedded special expression/API to recommend the most appropriate space and gross profit retail values in-line with the defined constraints and on the basis of the space profit tables.

Once the constraints are set, use this custom menu to run MSO to generate recommended space and gross profit retail values for the POG Departments.

## **2. Review Space and Profit Histograms @Dept View**

Use this view to review the MSO results in the form of histograms. Histograms represent a series of results in the form of cumulative recommended space and cumulative recommended gross profit retail values, while the optimization process allocates space to POG departments step by step. These results are derived by the special expression/API while allocating space to the individual POG Departments from the total available space.

The histograms graphically represent the relation/variation between allocated space and respective gross profit retail return for the POG Departments in a store.

Figure 5–10 represents a sample histogram for a set of optimization results.

**Figure 5–10 2. Review Space and Profit Histograms @Dept View**

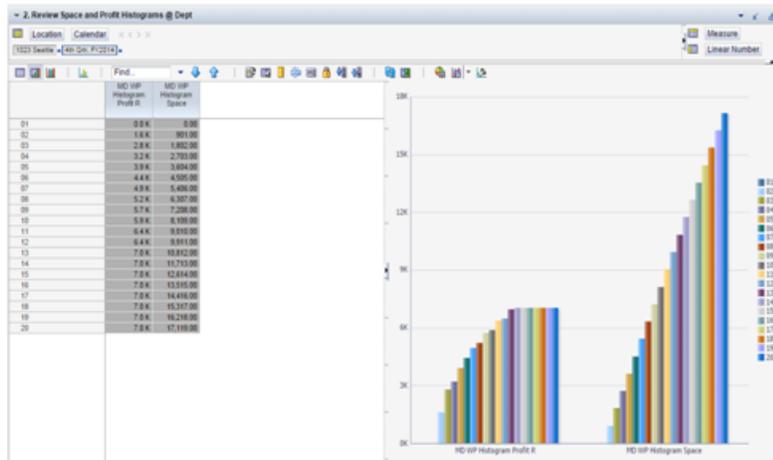


Table 5–3 lists the measures available on this view.

**Table 5–3 2. Review Space and Profit Histograms @Dept View Measures**

Label	Description
MD WP Histogram Space	Cumulative recommended space output from an MSO run while allocating space to individual POG departments in the store.
MD WP Histogram Profit R	Cumulative recommended gross profit retail output corresponding to the recommended space from an MSO run while allocating space to individual POG departments in the store.

## Approve Optimization Results Step

Use this step to approve the MSO results. Optimization results consist of the recommended space and gross profit retail values. Once approved, the optimization results for the POG Departments should be shared with a space management system for the new store layouts to be worked out. These results are also used as a reference for MSO at the POG Sub-Category level.

### Prior to starting this step:

MSO should have been conducted and the results obtained from it, in-line with the targets.

### After completing this step:

This is the last step in the MSO process at the POG Department level. With the approval of the MSO results at the POG Department level, the next step is to perform MSO at the POG Sub-Category level.

This step has one view.

## Custom Menu Option

Use the Approve Dept custom menu to approve the optimization results for the POG Departments.

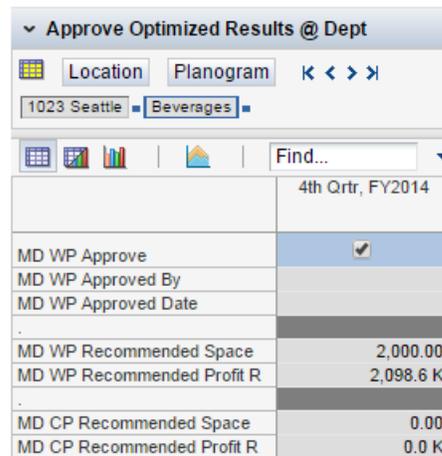
## Approve Optimization Results @Dept View

Use this view to approve the optimization results from an MSO run. Optimization results consist of the recommended space and recommended gross profit retail.

Mark the POG Departments which need to be approved and run the Approve Dept custom menu to complete the approval process. Once approved, the results stored in the working plan measures are copied to the CP version measures. These results need to be used as a reference while performing MSO at the POG Sub-Category level.

Note that the space at the POG Department level is measured in square units and, at the POG Sub-Category level, it is measured in linear units.

**Figure 5–11 Approve Optimization Results @Dept View**



4th Qtr, FY2014	
MD WP Approve	<input checked="" type="checkbox"/>
MD WP Approved By	
MD WP Approved Date	
MD WP Recommended Space	2,000.00
MD WP Recommended Profit R	2,098.6 K
MD CP Recommended Space	0.00
MD CP Recommended Profit R	0.0 K

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

**Table 5–4 Approve Optimization Results @Dept View Measures**

Label	Description
MD WP Recommended Space	Recommended space output for a POG Department from an MSO run corresponding to the recommended gross profit retail. The CP version of the measure (MD CP Recommended Space) is used to store the approved results.
MD WP Recommended Profit R	Recommended gross profit retail output for a POG department from an MSO run corresponding to the recommended space. the CP version of the measure (MD CP Recommended Profit R) is used to store the approved results.
MD WP Approve	A Boolean flag measure which needs to be checked before running the Approve Dept custom menu.
MD WP Approved By	User ID of the approver for the POG Department level optimization results.
MD WP Approved Date	The date on which the POG Department level optimization results were approved.

### Custom Menu

Use the Approve Dept custom menu to approve the optimization results for POG Departments. On approval, the custom menu copies the optimization results stored in the WP measures to the CP version measures.



## Macro Space Optimization @Sub-Category Task

The Macro Space Optimization @Sub-Category task is used to allocate optimum space to the POG sub-categories under a POG department. For more information on Macro Space Optimization, see ["Introduction to Macro Space Optimization"](#) in [Chapter 5](#).

This task has the following steps:

- [Review Category Scorecard Step](#)  
Review the targets set in the Category Plan and Merchandise Financial Plan to align MSO output to them.
- [Setup and Review Optimization Step](#)  
Define the constraints, run MSO, and review the output.
- [Approve Optimization Results Step](#)  
Approve the MSO output.

### Create the Macro Space Optimization @Sub-Category Workbook

To create the workbook:

1. Select the **New Workbook** icon in the Macro Space Optimization @Sub-Category task.

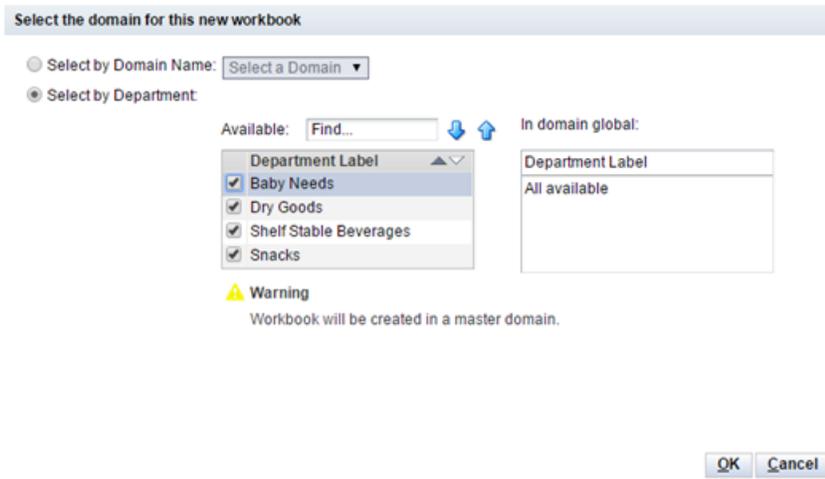
**Figure 6–1** Macro Space Optimization @Sub-Category Task



The workbook wizard opens.

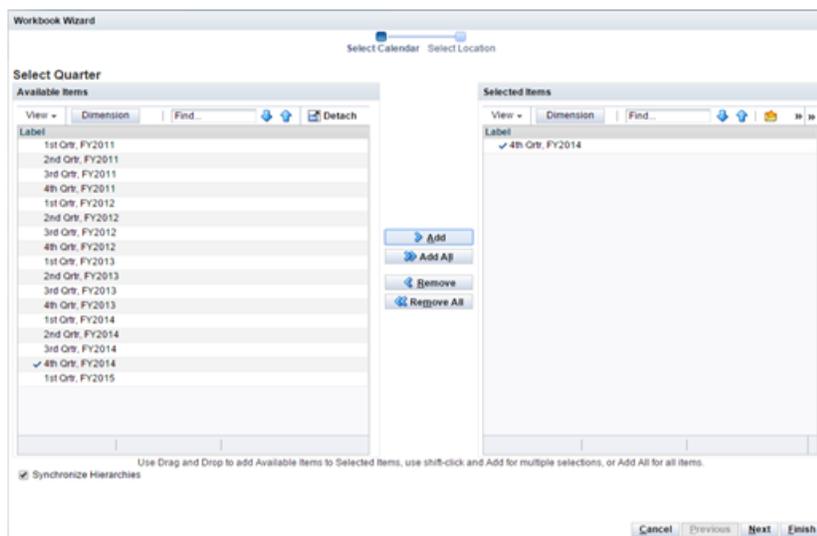
2. Select the domain name or departments and move it to the Selected Items box. Click **Next**.

**Figure 6–2 Workbook Wizard Select Domain or Departments Page**

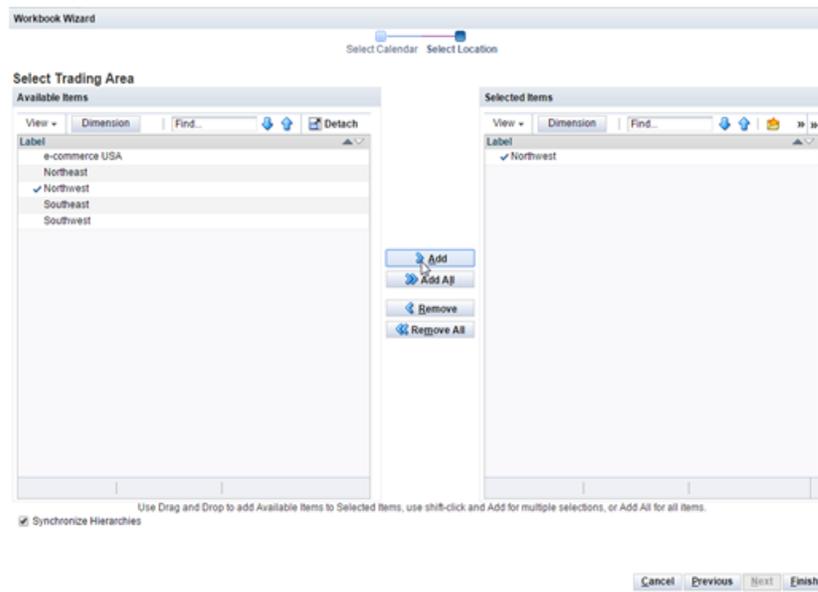


3. Select the quarter and move it to the Selected Items box. Click **Next**.

**Figure 6–3 Workbook Wizard Select Quarter Page**



4. Select the trading area and move it to the Selected Items box. Click **Next**.

**Figure 6–4 Workbook Wizard Select Trading Area Page**

The workbook is created.

## Review Category Scorecard Step

Use this step to review the Category Scorecard. The Category Scorecard presents the Category Plan and Merchandise Financial Plan details.

Use the targets and goals (in the form of roles, strategies, tactics, sales, gross profit, average inventory, turns, and so on), which were set as part of Category Planning and/or Merchandise Financial Planning, as a reference while defining the constraints for MSO and generating the results.

The Category Scorecard is presented on the POG hierarchy in MSO tasks, unlike in other tasks, such as Category Planning and Assortment Planning, where it is presented on the PROD hierarchy. The target plan information available on the PROD hierarchy needs to be transformed into the POG hierarchy.

The mapping between the PROD and POG hierarchies is maintained in Category Management Administration and is used to transform product hierarchy-based targets (from the Category Planning task and MFP application) into POG hierarchy-based targets.

For example, for a supermarket format store, in the product hierarchy, Juices is a single category or sub-category, but in the POG hierarchy based on the product packaging, it is divided into Bottled Juices and Tetra-pack Juices POG Categories or POG Sub-Categories. In such a scenario, the mapping between the PROD and POG hierarchies needs to be defined in the Category Management Administration workbook.

### Prior to starting this step:

- An approved Category Plan with various targets, roles, strategies, and tactics should be available.
- A Merchandise Financial Plan should be available and must be imported into RCM.

- The POG to PROD hierarchy mapping should be defined in Category Management Administration.
- Like Sub-Category mapping should be done in Category Management Administration in case new sub-categories are introduced.

**After completing this step:**

- Proceed to the next step in this task, [1. Setup and Review Optimization @Sub-Category View](#), to run MSO.

## Custom Menu Option

Use the Transform PROD to POG Hierarchy custom menu to transform the Category Plan and Merchandise Financial Plan from the PROD hierarchy to the POG hierarchy.

Note that all the activities in the MSO tasks are done on the POG hierarchy only. Therefore, there is a need to transform (or convert) PROD hierarchy-based targets (received from the Category Planning task and MFP application) to the POG hierarchy-based targets.

## Review Category Scorecard @Sub-Category View

Use this view to review the approved category plan (targets, roles, strategies, and tactics) and merchandise financial plan targets. The targets are in the form of Sales R, Sales Units, Gross Profit R, Average Inventory, Turns, and so on, sourced from the Category Planning task (OP measures) and MFP application (MFP measures).

Roles, strategies, and tactics, which come from the Category Plan, provide direction for the MSO process. They reflect the importance of a sub-category in category management, which helps ascertain the amount of space that needs to be allocated to any sub-category under a department. Space tactics, in particular, suggest the required increase or decrease in space required for a sub-category.

The idea is to align the allocation of space to sub-categories in MSO to these business plans.

For example, the following table shows the role, strategies, and tactics assigned to a set of sub-categories under a department:

Department	Category	Role	Sub-Category	Strategy	Tactics	
					Assortment	Space
Beverages	Coffee	Destination	Ground	Cash Generating	Increase	Increase
			Instant	Profit Generating	Maintain	Maintain
			Single Serve	Excitement Generating	Maintain	Maintain
			Whole	Turf-Defending	Increase	Maintain
	Tea	Routine				
	Juice	Convenience				
	Beer and Cider	Occasional				

Per the preceding table, the ground coffee sub-category's space needs to be increased keeping the space same (maintain - space tactics value) for all other sub-categories under the Coffee category. This should be kept in mind while defining the MSO run constraints.

The measures constituting a category plan and merchandise financial plan are available in the PROD hierarchy and need to be mapped to the POG hierarchy in this view.

Run the Transform PROD to POG Hierarchy custom menu option, after checking the WP Transform PROD to POG flag measure, to populate the plan measures in this view at the POG hierarchy level.

Figure 6–5 shows an example of different measures sourced from the Category Planning task in RCM and the MFP application.

**Figure 6–5 Review Category Scorecard @Sub-Category View**

	all (Planogram)	Beer & Cider	Bottled Water	Coffee	Juice	Milk Drinks	Soft Drinks	Spirits	Tea	Wine
WP Transform PROD to POG	<input type="checkbox"/>									
OP Assigned Role - Industry Model A	Destination			Destination					Destination	
OP Strategy Assignment	Cash Gen...			Cash Gen...					Cash Gen...	
OP Assigned Role - Industry Model B	Flagship			Flagship					Flagship	
OP Tactic Assignment	Maintain			Maintain					Maintain	
MS WP Sales R	1,714.4 K	0.0 K	0.0 K	1,711.0 K	3.4 K	0.0 K				
MS MFP Sales R	1,714.4 K	0.0 K	0.0 K	1,711.0 K	3.4 K	0.0 K				
MS WP Sales U	0	0	0	0	0	0	0	0	0	0
OP Sales R	3,099.0 K	0.0 K	0.0 K	3,092.8 K	6.2 K	0.0 K				
MS LY Sales R	0.0 K									
MS MFP Sales U	151,703	0	0	151,400	302	0	0	0	0	0
OP Sales U	272,566	0	0	272,043	543	0	0	0	0	0
MS LY Sales U	0	0	0	0	0	0	0	0	0	0
MS WP Sales AUR	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
MS MFP Sales AUR	11.30	0.00	0.00	11.30	11.30	0.00	0.00	0.00	0.00	0.00
OP Sales AUR	11.37	0.00	0.00	11.37	11.37	0.00	0.00	0.00	0.00	0.00
MS LY Sales AUR	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
MS WP Gross Profit R	1.0 K	0.0 K	0.0 K	0.7 K	0.3 K	0.0 K				
MS MFP Gross Profit R	444.6 K	0.0 K	0.0 K	443.7 K	0.9 K	0.0 K				
OP Gross Profit R	1,260.6 K	0.0 K	0.0 K	1,258.1 K	2.5 K	0.0 K				
MS LY Gross Profit R	0.0 K									
OP Promo Sales R	722.6 K	0.0 K	0.0 K	721.2 K	1.4 K	0.0 K				
OP Promo Sales U	83,018	0	0	82,852	165	0	0	0	0	0
OP Promo Sales AUR	8.70	0.00	0.00	8.70	8.70	0.00	0.00	0.00	0.00	0.00
OP Private Label Sales R	1,423.9 K	0.0 K	0.0 K	1,421.1 K	2.8 K	0.0 K				
OP Private Label Sales U	98,955	0	0	98,758	197	0	0	0	0	0
OP Private Label Sales AUR	14.39	0.00	0.00	14.39	14.39	0.00	0.00	0.00	0.00	0.00
OP Private Label Gross Profit R	61.3 K	0.0 K	0.0 K	61.2 K	0.1 K	0.0 K				

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

**Table 6–1 Review Category Scorecard @Sub-Category View Measures**

Label	Description
MS WP Transform PROD to POG	Flag measure which should be checked prior to running the Transform PROD to POG custom menu option.
OP Strategy Assignment	Strategy assigned to a sub-category or a category in the original plan in Category Planning. The strategy represents the overall approach to attain the assigned role to a category.
OP Assigned Role - Industry Model A	Final role assigned to the category per Industry Model A in the approved working plan version of the category plan, known as the original plan.
OP Assigned Role - Industry Model B	Final role assigned to the category per Industry Model B in the approved working plan version of the category plan, known as the original plan.
OP Tactic Assignment	Approved and targeted tactics assignment to a sub-category at the trading area level in the category plan.

**Table 6–1 (Cont.) Review Category Scorecard @Sub-Category View Measures**

<b>Label</b>	<b>Description</b>
MS WP Sales R	Working plan's sales retail value defined in the POG hierarchy optimization for the POG Sub-Category. An LY version of this measure (MS LY Sales R) is also available.
MS WP Sales U	Working plan's sales units defined in the POG hierarchy optimization for the POG Sub-Category. An LY version of this measure (MS LY Sales U) is also available.
MS WP Sales AUR	Working plan's average unit retail value defined in the POG hierarchy for the POG Sub-Category. An LY version of this measure (MS LY Sales AUR) is also available.
MS WP Gross Profit R	Working plan's gross profit value defined in the POG hierarchy for POG Sub-Category. An LY version of this measure (MS LY Gross Profit R) is also available.
OP Sales R	Original plan assortment's (approved category plan's) sales retail value. It is used in assortment planning and MSO as the target sales retail value.
OP Sales U	Original plan assortment's (approved category plan's) sales units. It is used in assortment planning and MSO as the target sales units.
OP Gross Profit R	Original plan assortment's (approved category plan's) gross profit value. It is used in assortment planning and MSO as the target gross profit retail value.
OP Sales AUR	Original plan assortment's (approved category plan's) average unit retail value. It is used in Assortment Planning and MSO as the target average unit retail value.
OP Promo Sales R	Original plan's (approved category plan's) promotional sales retail value. It is used in Assortment Planning and MSO as the target promo sales retail value.
OP Promo Sales U	Original plan's (approved category plan's) promotional sales units. It is used in Assortment Planning and MSO as the target promo sales units.
OP Promo Sales AUR	Original plan's (approved category plan's) average unit retail value. It is used in Assortment Planning and MSO as the target average unit retail value.
OP Private Label Sales R	Original plan's (approved category plan's) sales retail value from private label products. It is used in Assortment Planning and MSO as the target sales retail value for private label products.
OP Private Label Sales U	Original plan's (approved category plan's) sales units from private label products. It is used in Assortment Planning and MSO as the target sales units for private label products.
OP Private Label Sales AUR	Original plan's (approved category plan's) average unit retail value from private label products. It is used in Assortment Planning and MSO as the target average unit retail value for private label products.
OP Private Label Gross Profit R	Original plan's (approved category plan's) gross profit retail value from private label products. It is used in Assortment Planning and MSO as the target gross profit retail value for private label products.
OP Avg Inv R	Original plan's (approved category plan's) average inventory retail value carried. It is used in Assortment Planning and MSO as the target average inventory retail value.

**Table 6–1 (Cont.) Review Category Scorecard @Sub-Category View Measures**

<b>Label</b>	<b>Description</b>
OP Turn	Original plan's (approved category plan's) turns. Turns represent the number of times the average inventory carried can be sold over in a specified period of time. This measure is used in Assortment Planning and MSO as the target average inventory retail value.
MS WP Sales C	Working plan's sales cost value defined for the POG Sub-Category. An LY version of this measure (MS LY Sales C) is also available.

### Custom Menu

Use the Transform PROD to POG Hierarchy custom menu in this view to transform the PROD hierarchy-based plan (Category Plan and Merchandise Financial Plan) measures to the respective POG hierarchy measures.

This custom menu utilizes the mapping defined between the PROD and POG hierarchies by the administrator in the Category Administration task to come up with POG-based plan measure values.

Note that the measures in this view are only populated after the custom menu runs.

## Setup and Review Optimization Step

Use this step to run MSO and review the optimization results.

MSO is used to derive and allocate optimum space to the sub-categories under a category in a store. An algorithm, in the form of special expression ASOSpace, is used through a custom menu trigger to identify the appropriate space and corresponding profit, while keeping the constraints set in this view under consideration. Space and Profit tables, containing data on space-to-profit variance based on historic data, are utilized by the algorithm and form the basis of the optimization results.

There are two types of MSO:

- Space-based: For a given set of space constraints, optimization recommends the maximum profit.
- Financial parameter-based: For a given set of gross profit targets, optimization recommends the optimum space.

MSO can be run at the store, store cluster, or trading area level for a set of POG sub-categories mapping to a POG department.

To run MSO and review the results:

1. Set the constraints for optimization mechanics:
  - Optimization Type and Target Alignment Type: There are two optimization types: Space-based and Financial parameter-based. Space-based optimization type has the target alignment type of Less than or Equal to. For Financial parameter-based, the two options include Max Profit Up and Max Profit Down. The combined options include the following:
    - Space - Less than or Equal to
    - Financial - Max Profit Up
    - Financial - Max Profit Down

- Financial Target Metric and Optimization Method: Optimization can be based on the different financial target metrics which include MFP Gross Profit R and OP Gross Profit R. There is one optimization method available: Optimal.
2. Set the space constraints:
    - Upper guard rail % or Upper guard rail space: Upper guard rail space is used in optimization to define the upper limit of space allocation for any sub-category, so as to keep the optimization results within an upper bound value of space. It can be defined as a percentage of the current space.
    - Lower guard rail % or Lower guard rail space: Similar to the Upper guard rail, Lower guard rail space is defined as the lower limit of space allocation for any sub-category and can also be defined as a percentage of current space.
    - Max and min space: Max and min space values represent the highest upper limit and lowest limit of space that can be made available to any sub-category. Optimization process picks the lower of the max space and upper guard rail space and the higher of the min space and lower guard rail space as inputs while setting the range of optimization results.
    - Current space, total available space, and space increments for POGs: Current space represents the space allocated to any sub-category in the current store layout. Total available space represents the space made available to the POG Department to which a set of POG Sub-Categories map to in an the upcoming space plan. Space increments are based on the planogram specifications, which determine the minimum length by which current space can be changed.
  3. Set the optimization scope per the business requirements:
    - a. Select the sub-categories to be included in the optimization.
    - b. Select the mandatory sub-categories. Mandatory sub-categories should definitely be part of the final assortment. Checking the mandatory flag for a sub-category ensures that it gets a higher priority in space allocation from the available space.
    - c. Lock the current space for sub-categories.
  4. After setting the previously mentioned constraints, run the Optimize Sub-Category custom menu.
  5. Review the optimization results in the form of recommended space and respective gross profit by comparing them with the set space constraints and targets in the category scorecard.
  6. Review the optimization results using the histogram formats.

**Prior to starting this step:**

- Review the targets in the Category Scorecard.
- Ensure that the space profit tables are populated.

**After completing this step:**

Proceed to the Approve Optimization Result step to approve the optimization results.

This step has the following views:

- [1. Setup and Review Optimization @Sub-Category View](#)
- [2. Review Space and Profit Histograms @Sub-Category View](#)

## Custom Menu Option

Use the Optimize Sub-Category custom menu to run the optimization at the sub-category level once all the constraints have been defined.

### 1. Setup and Review Optimization @Sub-Category View

Use this view to do the following:

- Set the constraints for MSO for the sub-categories mapped to a department.
- Run MSO using the Optimize Sub-Category custom menu.
- Review the results from the optimization in the form of recommended space and gross profit retail.

Define the following constraints:

- Optimization type constraints: These constraints define the mechanics of MSO. The following measures need to be defined: MS WP Optimization and Target Alignment Type, MS WP Financial Target Metric, and MS WP Optimization Method.
- Space constraints: Space constraints define the range (upper and lower limits) of space allocation, current space of a sub-category, and total available space for the department to which the sub-categories maps. The measure list to be defined consists of the following: MS WP Total Available Space Linear Units, MS WP Space Increment, MS WP Current Space Linear Units, MS WP Min. Space, MS WP Max. Space, MS WP Lower Guard Rail %, MS WP Upper Guard Rail %, MS WP Lower Guard Rail Space, and MS WP Upper Guard Rail Space.

The optimization algorithm triggered by the custom menu picks the following inputs when it comes to determining the range of space allocation:

- The lower limit of the space allocation range is the higher value of the two measures: MS WP Max. Space and MS WP Upper Guard Rail Space.
- The upper limit of space allocation range is the lower value of the two measures: MS WP Min. Space and MS WP Lower Guard Rail Space.
- Optimization Scope constraints: This set of measures is used to define the scope of MSO for the sub-categories under a department. The measures that need to be defined here consist of the following flag measures: MS WP Include POG Sub-Category, MS WP Lock Space, and MS WP Mandatory.

For details on the measures, see [Table 6-2](#).

Display this view at the POG Sub-Category and POG Department levels in outline view mode. Optimization can be run at the following levels:

- Store, cluster, or trading area level on the location hierarchy.
- Quarter, Half Year, or Year level.

[Figure 6-6](#) shows an example of the set constraints and derived optimization results at the POG Department level.

**Figure 6–6 1. Setup and Review Optimization Parameters @Sub-Category View**

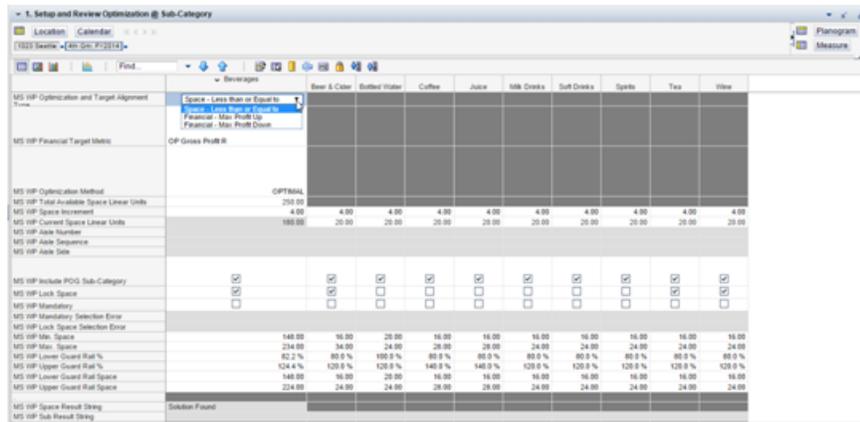


Table 6–2 lists the measures available in this view.

**Table 6–2 1. Setup and Review Optimization Parameters @Sub-Category View Measures**

Label	Description
MS WP Optimization and Target Alignment Type	Used to define the type of MSO and target alignment from a drop-down selection. The following options are available for selection: Space - Less than or Equal to, Financial -Max Profit Up, and Financial - Max Profit Down.
MS WP Financial Target Metric	Used to assign the target metric to be used as the basis for MSO at the POG Sub-Category. The following options are available: MFP Gross Profit R and OP Gross Profit R.
MS WP Optimization Method	Method adopted by MSO is defined through this measure. There is one optimization method available: Optimal.
MS WP Total Available Space Linear Units	Represents the total available space in linear units for a POG department to which the POG sub-categories map for the upcoming space plan or the working plan.
MS WP Space Increment	Represents the incremental value of space in linear units by which the space should be increased or decreased for a POG Sub-Category. This is based on the predefined size of POGs for different sub-categories designed per the store layout, shelves, and fixture specs.
MS WP Current Space Linear Units	Represents the current space in linear units, assigned to a POG Sub-Category at a store.
MS WP Aisle Number	Used to identify the location or placement of a sub-category in a store. An aisle is a passage for customer to walk through. A store consists of multiple aisles with merchandise displayed on either side. This is first coordinate of the three coordinates used to identify the location of a sub-category on the store floor.
MS WP Aisle Sequence	Used to identify the position sequence of a sub-category in an aisle. This acts as the second coordinate in identifying the sub-category on the store floor. See the store layout diagram in <a href="#">Figure 6–7</a> .
MS WP Aisle Side	Used to identify the side on which a sub-category is placed in an aisle while walking through the aisle in the direction of expected customer traffic movement. This acts as a third coordinate to identify a sub-category's location on the store floor. See the store layout diagram in <a href="#">Figure 6–7</a> .

**Table 6–2 (Cont.) 1. Setup and Review Optimization Parameters @Sub-Category View Measures**

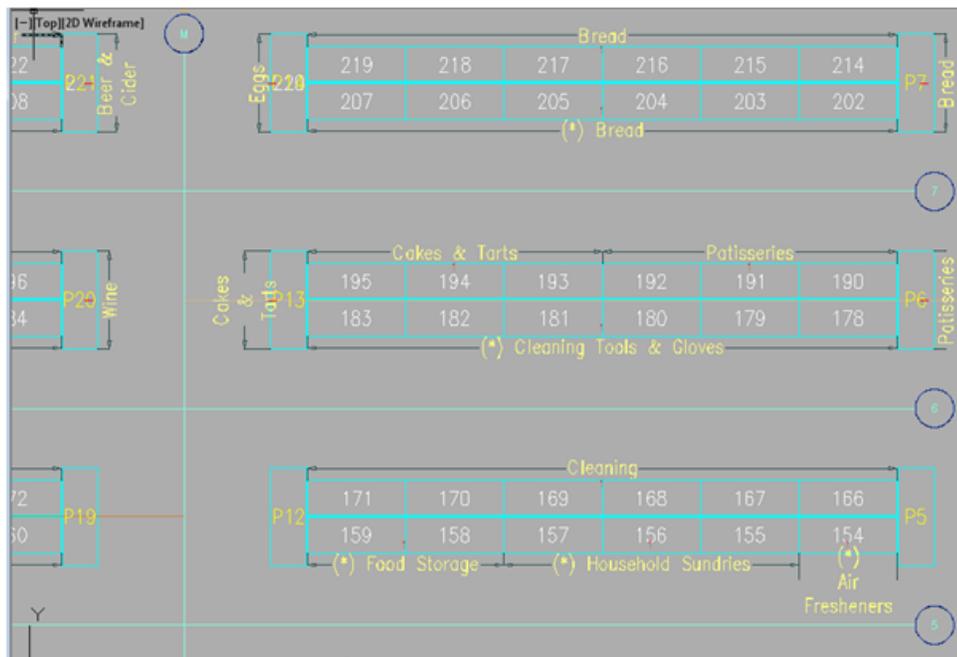
<b>Label</b>	<b>Description</b>
MS WP Include POG Sub-Category	Flag measure used to mark the POG Sub-Categories which should participate in MSO for space allocation.
MS WP Lock Space	Flag measure used to lock space for a POG Sub-Category in the MSO run. It is used to maintain the current space allotted to the POG Sub-Category in the upcoming space plan or working plan. The current space of the locked POG Sub-Category is deducted from the total available space for the respective POG Department to calculate the effective total available space used for allocating space for the rest of the POG Sub-Categories participating in MSO.
MS WP Mandatory	Flag measure used to mark the mandatory POG Sub-Categories, which should be given higher priority in space allocation from the total available space by MSO.
MS WP Lock Space Selection Error	Used to present the error messages in case the Lock Space measure is checked for a POG Sub-Category without including it (through the Include flag measure) for an MSO run.
MS WP Mandatory Selection Error	Used to present the error messages in case the Mandatory measure is checked for a POG Sub-Category without including the sub-category (through the Include flag measure) for an MSO run.
MS WP Min. Space	Minimum amount of space that can be allocated to a POG Sub-Category.
MS WP Max. Space	Maximum amount of space that can be allocated to a POG Sub-Category.
MS WP Lower Guard Rail %	User-defined lower limit space percentage output for a POG Sub-Category required from an optimization run. It is expressed as an absolute percentage of current space of a POG Sub-Category. It is used to control the lower limit of recommended space output for a POG Sub-Category, from an optimization run, so as to keep it within the range per the business requirements.
MS WP Upper Guard Rail %	User-defined upper limit space percentage output for a POG Sub-Category required from an optimization run. It is expressed as an absolute percentage of the current space of a POG Sub-Category. It is used to control the upper limit of the recommended space output for a POG Sub-Category, from an optimization run, so as to keep it within the range per the business requirements.
MS WP Lower Guard Rail Space	User-defined lower limit space output for a POG Sub-Category required from the optimization run. It can be directly entered or calculated on the basis of MS WP Lower Guard Rail %. It is used to control the lower limit of the recommended space output from an optimization run, so as to keep it within the range per the business requirements.
MS WP Upper Guard Rail Space	User-defined upper limit space output for a POG Sub-Category expected from the optimization run. It can be directly entered or calculated on the basis of MS WP Upper Guard Rail %. It is used to control the upper limit of the recommended space output from an optimization run, so as to keep it within the range per the business requirements.
MS WP Space Result String	Used to present the error messages applicable at the aggregate level in an optimization run. For example: Max Capacity is invalid.

**Table 6–2 (Cont.) 1. Setup and Review Optimization Parameters @Sub-Category View Measures**

Label	Description
MS WP Sub Result String	Used to present the specific error messages in the optimization run. It specifically points to the POG Sub-Category where some user-defined constraints are off-the-mark. For example: Invalid Min Max Constraints for a specific sub-category.
MS WP Recommended Space	Recommended space output for a sub-category from an MSO run corresponding to the recommended gross profit retail. The CP version of the measure is used to store the approved results.
MS WP Space Change	Difference between the recommended space and current space for a POG Sub-Category.
MS WP Recommended Gross Profit R	Recommended gross profit retail output for a POG Sub-Category from an MSO run corresponding to the recommended space. The CP version of the measure is used to store the approved results.
MS WP Gross Profit Change	Difference between the recommended gross profit and working plan gross profit retail for a POG Sub-Category.

The following diagram shows an example of a store layout. [Table 6–3](#) describes the aisles in the diagram.

**Figure 6–7 Store Layout Diagram**



**Table 6–3 Aisle Description of Store Layout Diagram**

	Aisle Number	Aisle Position Sequence	Aisle Side
Bread	7	1	Right
Patisseries	7	1	Left
Cakes & Tarts	7	2	Left

**Table 6–3 (Cont.) Aisle Description of Store Layout Diagram**

	Aisle Number	Aisle Position Sequence	Aisle Side
Cleaning Tools & Gloves	6	1	Right
Cleaning	6	1	Left
Air Fresheners	5	1	Right
Household Sundries	5	2	Right
Food Storage	5	3	Right

### Custom Menu Option

This view supports the Optimize Sub-Category custom menu which is used to run MSO at the sub-category level. A set of sub-categories mapping to a department are allocated space using this custom menu. This custom menu utilizes an embedded special expression/API to recommend the most appropriate space and gross profit retail values in-line with the defined constraints and on the basis of the space profit tables.

Once the constraints are set, use this custom menu to run MSO to generate recommended space and gross profit retail values for the sub-categories.

## 2. Review Space and Profit Histograms @Sub-Category View

Use this view to review the MSO results in the form of histograms. Histograms represent a series of results in the form of cumulative recommended space and gross profit retail values. These results are derived by the special expression/API while allocating space to individual POG Sub-Categories from the total available space.

The histograms here graphically represent the relation/variation between space allocated and respective gross profit retail return for the POG Sub-Categories under a POG Department.

Figure 6–8 represents a sample histogram for a set of optimization results.

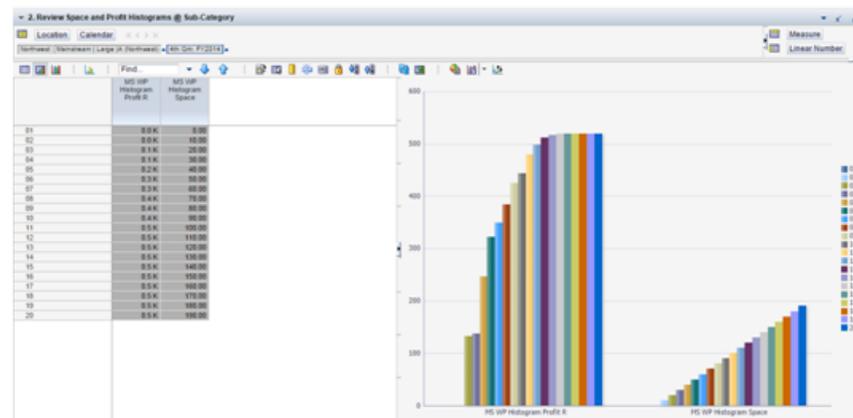
**Figure 6–8 2. Review Space and Profit Histograms @Sub-Category View**

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

**Table 6–4 2. Review Space and Profit Histograms @Sub-Category View Measures**

Label	Description
MS WP Histogram Space	Cumulative recommended space output from an MSO run while allocating space to individual POG Sub-Categories under a department.
MS WP Histogram Profit R	Cumulative recommended gross profit retail output corresponding to the recommended space from an MSO run while allocating space to individual POG Sub-Categories under a department.

## Approve Optimization Results Step

Use this step to approve the MSO results. Optimization results consist of the recommended space and gross profit retail value. Once approved, the optimization results are shared with the assortment planning process, so that the assortments for the sub-categories can be planned in-line with the allocated space.

### Prior to starting this step:

MSO should have been conducted and the results obtained from it, in-line with the targets.

### After completing this step:

This is the last step in the MSO process. With the approval of the MSO results, the next step in the overall business process flow involves beginning the assortment planning process.

This step has one view.

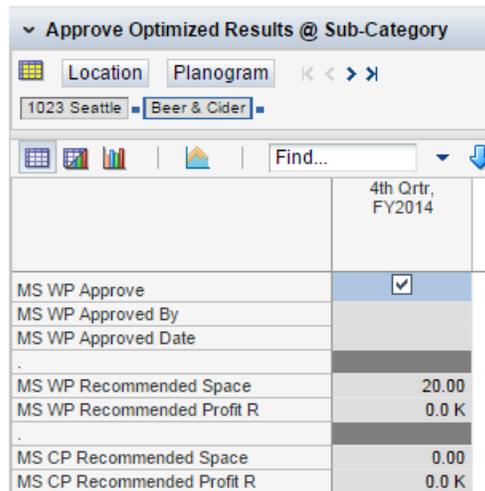
## Custom Menu Option

Use the Approve Sub-Category custom menu to approve the optimization results for the POG Sub-Categories.

## Approve Optimization Results @Sub-Category View

Use this view to approve the optimization results from the MSO run. Optimization results consist of the recommended space and gross profit retail.

Mark the POG Sub-Categories which need to be approved and run the Approve Sub-Category custom menu to complete the approval process. Once approved, the results stored in the working plan measures are copied to the CP version measures. Once approved, the optimization results are conveyed or passed onto the assortment planning task. These measures appear in the assortment planning scorecard view so as to ensure that the assortment plans being created for the sub-categories are in alignment to the space allocated to them.

**Figure 6–9 Approve Optimization Results @Sub-Category View**


Approve Optimized Results @ Sub-Category	
Location	Planogram
1023 Seattle	Beer & Cider
4th Qtr, FY2014	
MS WP Approve	<input checked="" type="checkbox"/>
MS WP Approved By	
MS WP Approved Date	
MS WP Recommended Space	20.00
MS WP Recommended Profit R	0.0 K
MS CP Recommended Space	0.00
MS CP Recommended Profit R	0.0 K

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

**Table 6–5 Approve Optimization Results @Sub-Category View Measures**

Label	Description
MS WP Recommended Space	Recommended space output for a POG Sub-Category from an MSO run corresponding to the recommended gross profit retail. The CP version of the measure (MS CP Recommended Space) is used to store the approved results.
MS WP Recommended Profit R	Recommended gross profit retail output for a POG Sub-Category from an MSO run corresponding to the recommended space. The CP version of the measure (MS CP Recommended Profit R) is used to store the approved results.
MS WP Approve	A Boolean flag measure which needs to be checked before running the Approve Sub-Category custom menu.
MS WP Approved By	User ID of the approver for the POG Sub-Category level optimization results.
MS WP Approved Date	The date on which the POG Sub-Category level optimization results were approved.

### Custom Menu Option

Use the Approve Sub-Category custom menu to approve the optimization results for the POG Sub-Categories. On approval, the custom menu copies the optimization results stored in the WP measures to the CP version measures.



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## Assortment Planning Analysis Task

This chapter describes the Assortment Planning Analysis task.

### Create the Assortment Planning Analysis Workbook

To create the workbook:

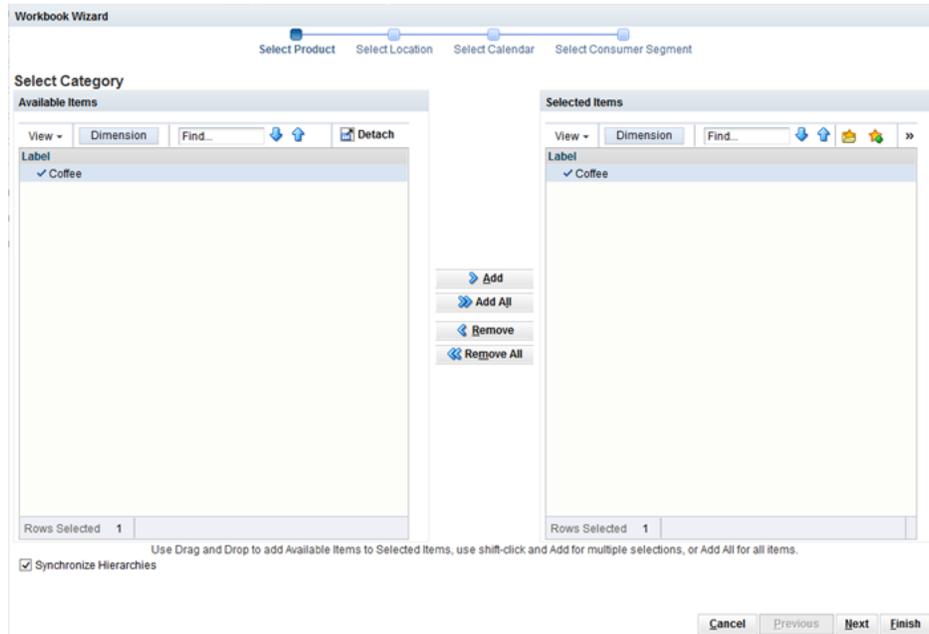
1. Select the **New Workbook** icon in the Assortment Planning Analysis task.

*Figure 7-1 Assortment Planning Analysis Task*



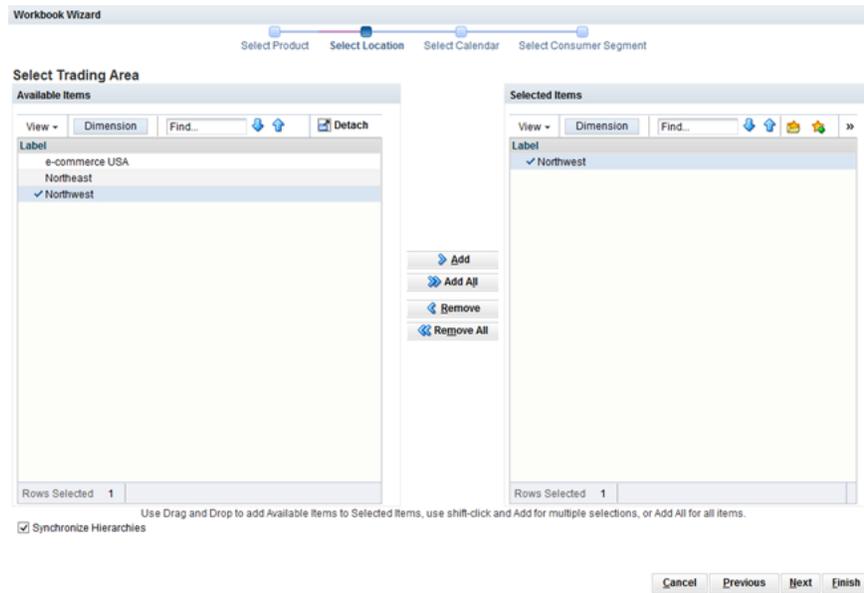
2. Select only one category and move it to the Selected Items box. Click **Next**.

**Figure 7–2 Workbook Wizard Select Category Page**



3. Select the trading areas and move them to the Selected Items box. Click Next.

**Figure 7–3 Workbook Wizard Select Trading Area Page**



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

**Figure 7–4 Workbook Wizard Select Quarter Page**

Workbook Wizard

Select Product   Select Location   **Select Calendar**   Select Consumer Segment

**Select Quarter**

Available Items

View - Dimension Find... Detach

Label
1st Qtr, FY2011
2nd Qtr, FY2011
3rd Qtr, FY2011
4th Qtr, FY2011
1st Qtr, FY2012
2nd Qtr, FY2012
3rd Qtr, FY2012
4th Qtr, FY2012
✓ 1st Qtr, FY2013
✓ 2nd Qtr, FY2013
✓ 3rd Qtr, FY2013
✓ 4th Qtr, FY2013
✓ 1st Qtr, FY2014
✓ 2nd Qtr, FY2014
✓ 3rd Qtr, FY2014
✓ 4th Qtr, FY2014
1st Qtr, FY2015

Rows Selected 8

Selected Items

View - Dimension Find... Detach

Label
✓ 1st Qtr, FY2013
✓ 2nd Qtr, FY2013
✓ 3rd Qtr, FY2013
✓ 4th Qtr, FY2013
✓ 1st Qtr, FY2014
✓ 2nd Qtr, FY2014
✓ 3rd Qtr, FY2014
✓ 4th Qtr, FY2014

Rows Selected 8

Use Drag and Drop to add Available Items to Selected Items, use shift-click and Add for multiple selections, or Add All for all items.

Synchronize Hierarchies

Cancel Previous Next Finish

5. Select the Consumer Segments and move them to the Selected Items box. Click **Finish**.

**Figure 7–5 Workbook Wizard Select Version Page**

Workbook Wizard

Select Product   Select Location   Select Calendar   **Select Consumer Segment**

**Select Version**

Available Items

View - Dimension Find... Detach

Label
Gourmet Shoppers CDT Version 1
smoke
✓ Soccer Moms CDT Version 1
✓ Value Seekers CDT Version 1

Rows Selected 2

Selected Items

View - Dimension Find... Detach

Label
✓ Soccer Moms CDT Version 1
✓ Value Seekers CDT Version 1

Rows Selected 2

Use Drag and Drop to add Available Items to Selected Items, use shift-click and Add for multiple selections, or Add All for all items.

Synchronize Hierarchies

Cancel Previous Next Finish

The workbook is created.

## Performance Analysis Step

Performance Analysis, presented here, is in the retailer's business context. Use this step to analyze the retailer's internal 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:
  1. Gross Profit and Inventory Turns View
  2. Sales Revenue and Sales Units View
  3. Sales Revenue and Gross Profit View
  4. 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. It is possible to drill down in this view to the cluster level. It represents actuals for elapsed periods and planned values for future periods.

**Figure 7–6 Sales and Gross Profit Analysis View**

Sales and Gross Profit Analysis		all [Calendar]	1st Qtr, FY2014	2nd Qtr, FY2014	3rd Qtr, FY2014	4th Qtr, FY2014
Ground	WP Segment % Share of Category Profit	50.2 %	50.2 %	50.2 %	50.2 %	50.2 %
	WP Avg Profit per Item R	781.4 K	195.4 K	195.4 K	195.4 K	195.4 K
	WP Avg Sales per Item R	2,165.3 K	525.9 K	446.0 K	433.8 K	759.6 K
	WP Avg Sales per Item U	202,558	49,192	41,779	40,720	70,867
	WP Profit Productivity Index	0.98	0.98	0.98	0.98	0.98
	WP Sales Productivity Index	0.96	0.96	0.96	0.96	0.97
	WP Sales contrib to Total Category R	49.2 %	49.2 %	49.2 %	49.1 %	49.4 %
	WP Sales contrib to Total Category U	47.9 %	47.9 %	47.9 %	47.9 %	47.9 %
Ground De-Caffeinated	WP Segment % Share of Category Profit	9.5 %	9.5 %	9.5 %	9.5 %	9.5 %
	WP Avg Profit per Item R	147.7 K	36.9 K	36.9 K	36.9 K	36.9 K
	WP Avg Sales per Item R	402.5 K	98.0 K	83.1 K	80.4 K	141.0 K
	WP Avg Sales per Item U	39,268	9,556	8,116	7,882	13,713
	WP Profit Productivity Index	0.79	0.79	0.79	0.79	0.79
	WP Sales Productivity Index	0.77	0.77	0.77	0.76	0.77
	WP Sales contrib to Total Category R	9.2 %	9.2 %	9.2 %	9.1 %	9.2 %
	WP Sales contrib to Total Category U	9.3 %	9.3 %	9.3 %	9.3 %	9.3 %
Ground Regular - Caffeinated	WP Segment % Share of Category Profit	40.7 %	40.7 %	40.7 %	40.7 %	40.7 %
	WP Avg Profit per Item R	633.7 K	158.4 K	158.4 K	158.4 K	158.4 K
	WP Avg Sales per Item R	1,762.8 K	427.9 K	362.9 K	353.4 K	618.6 K
	WP Avg Sales per Item U	163,290	39,635	33,663	32,838	57,154
	WP Profit Productivity Index	1.04	1.04	1.04	1.04	1.04
	WP Sales Productivity Index	1.02	1.02	1.02	1.02	1.03
	WP Sales contrib to Total Category R	40.1 %	40.1 %	40.0 %	40.0 %	40.2 %
	WP Sales contrib to Total Category U	38.6 %	38.6 %	38.6 %	38.6 %	38.7 %

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

**Table 7–1 Sales and Gross Profit Analysis Measures**

Label	Definition
WP Segment % Share of Category Profit	The percentage share contribution of a particular product segment (sub-category, CDT segment, and so on) towards the overall gross profit of the category.

**Table 7-1 (Cont.) Sales and Gross Profit Analysis Measures**

<b>Label</b>	<b>Definition</b>
WP Avg. Profit per Item R	The average gross profit retail per item in the working plan assortment for the cluster.
WP Avg. Sales per Item R	The average sales retail per item in the working plan for the cluster.
WP Avg. Sales per Item U	The average sales units per item in the working plan for the cluster.
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. This is a relative index of the average profit per SKU in the product segment compared to the average profit per SKU in the category. It helps identify if certain product segments are performing significantly better or worse from a profitability perspective.
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. This is a relative index of the average sales per SKU in the product segment compared to the average sales per SKU in the category. It helps identify if certain product segments are performing significantly better or worse from a sales perspective.
WP Sales contrib to Total Category R	The contribution, in percentage points, of a sub-category's sales retail value to the overall category sales retail value.
WP Sales contrib to Total Category U	The contribution, in percentage points, of a sub-category's units' value to the overall category sales units value.

## Performance Quadrant Analysis Tab

This tab has four views.

### 1. 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 7-7 1. Gross Profit and Inventory Turns View**

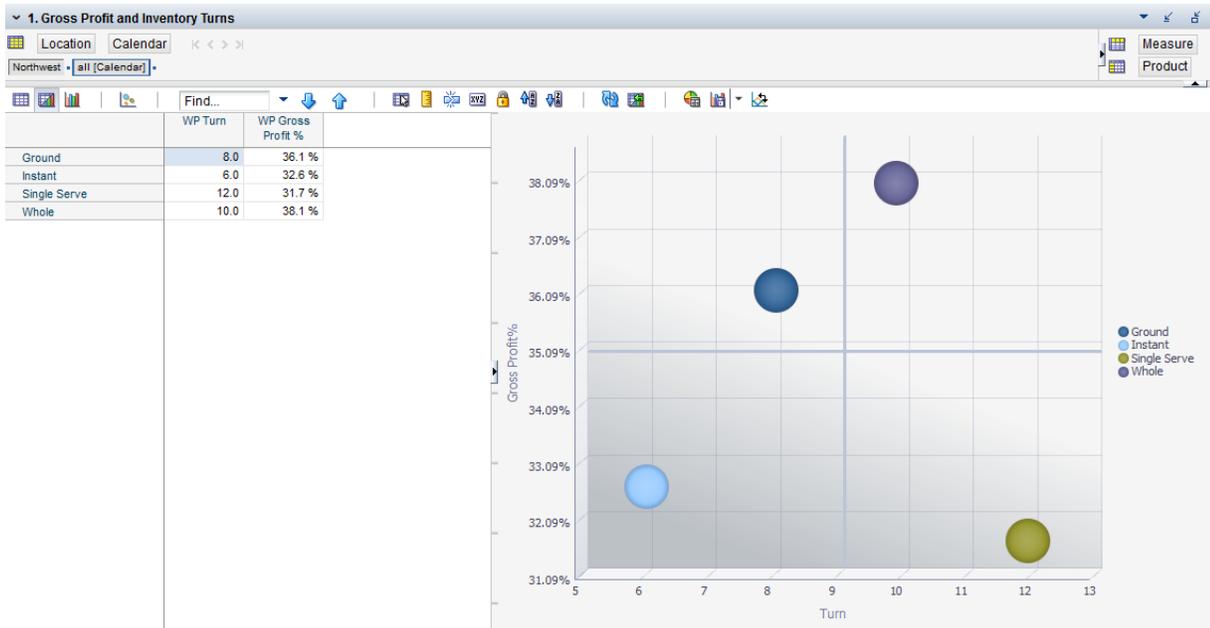


Table 7-2 lists the measures available in this view.

**Table 7-2 1. Gross Profit and Inventory Turns Measures**

Label	Definition
Target Gross Profit %	The approved and targeted gross profit percentage for a category or sub-category at the trading area level in the category plan.
Target Turn	The approved and targeted inventory turns for a sub-category or category at the trading area level in the category plan.
WP Gross Profit %	The gross profit percentage from the merchandise in the working plan assortment. This measure is different from the WP Assort Gross Profit % measure as it reflects gross profit percentage for all items irrespective of whether or not these items are part of the working plan assortment.
WP Turn	Inventory turns in a working plan. It reflects the number of times the carried inventory can be rolled over in a specified period of time.

**2. Sales Revenue and Sales Units View**

Use this view to analyze sales dollars and units. This information is best displayed as a bubble chart.

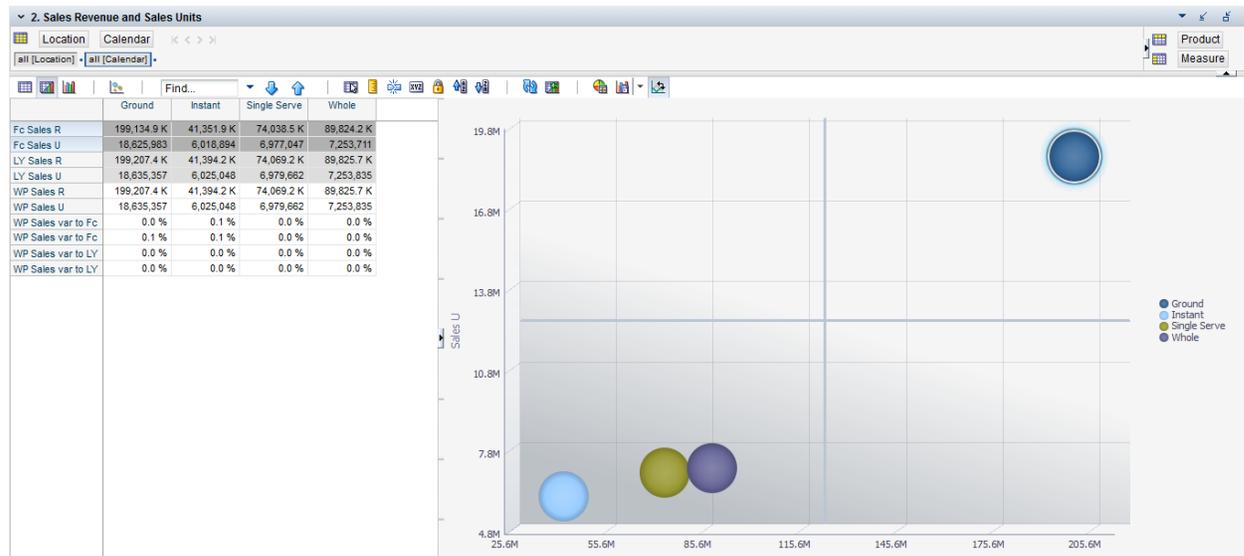
**Figure 7–8 2. Sales Revenue and Sales Units View**

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

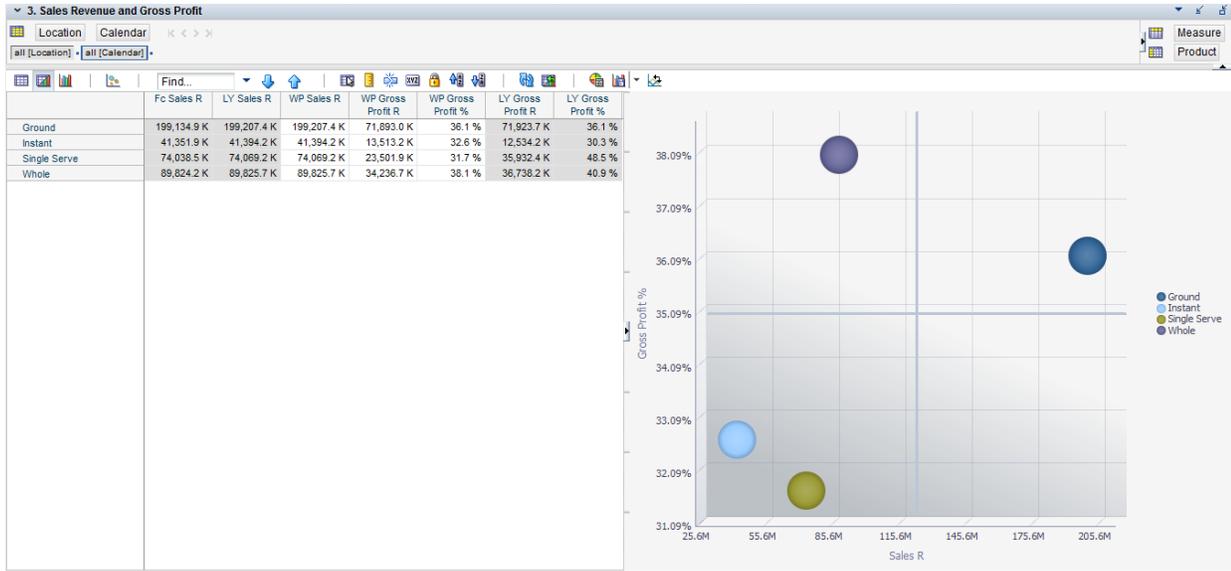
**Table 7–3 2. Sales Revenue and Sales Units Measures**

Label	Definition
Fc Sales R	Sales retail value for a time period per the forecast.
Fc Sales U	Sales units for a time period per the forecast.
LY Sales R	Last year's assortment's sales retail value.
LY Sales U	Last year's assortment's sales units.
WP Sales R	The working plan sales retail value. This measure is different from the WP Assort Sales R measure as it reflects the sales retail value for all items irrespective of whether or not these items are part of the working plan assortment.
WP Sales U	The working plan sales units. This measure is different from the WP Assort Sales U measure as it reflects the sales units for all items irrespective of whether or not these items are part of the working plan assortment.
WP Sales var to Fc R	The working plan's sales retail value's variance to the same in the forecast.
WP Sales var to Fc U	The working plan's sales units' variance to the same in the forecast.
WP Sales var to LY R	The working plan's sales retail value's variance to the same in last year's actuals.
WP Sales var to LY U	The working plan's sales units' variance to the same in last year's actuals.

### 3. 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 7–9 3. Sales Revenue and Gross Profit View**



The chart shown in the preceding figure analyzes Sales R versus Gross Profit% for each sub-category in the Coffee category. Note this analysis is possible at multiple different product hierarchy levels. The chart indicates that Ground coffee falls in the high Sales R and Gross Profit% quadrant whereas Whole Bean has high Gross Profit% and low Sales R whereas the Instant and Single Serve sub-categories fall in the low Sales R and low Gross Profit% quadrant.

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

**Table 7–4 3. Sales Revenue and Gross Profit Measures**

Label	Definition
Fc Sales R	Sales retail value for a time period per the forecast.
LY Gross Profit R	The gross profit retail value from the merchandise. This measure is different from the LY Assort Gross Profit R measure as it reflects gross profit retail for all items irrespective of whether or not these items are part of last year's assortment.
LY Gross Profit %	The gross profit percentage from the merchandise in last year's assortment. This measure is different from the LY Assort Gross Profit % measure as it reflects gross profit percentage for all items irrespective of whether or not these items are part of last year's assortment.
LY Sales R	Last year's assortment's sales retail value.
WP Sales R	The working plan sales retail value. This measure is different from the WP Assort Sales R measure as it reflects the sales retail value for all items irrespective of whether or not these items are part of the working plan assortment.
WP Gross Profit R	The gross profit retail from the merchandise in the working plan assortment. This measure is different from the WP Assort Gross Profit R measure as it reflects gross profit retail for all items irrespective of whether or not these items are part of the working plan assortment.

**Table 7-4 (Cont.) 3. Sales Revenue and Gross Profit Measures**

Label	Definition
WP Gross Profit %	The gross profit percentage from the merchandise in the working plan assortment. This measure is different from the WP Assort Gross Profit % measure as it reflects gross profit percentage for all items irrespective of whether or not these items are part of the working plan assortment.

#### 4. 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.

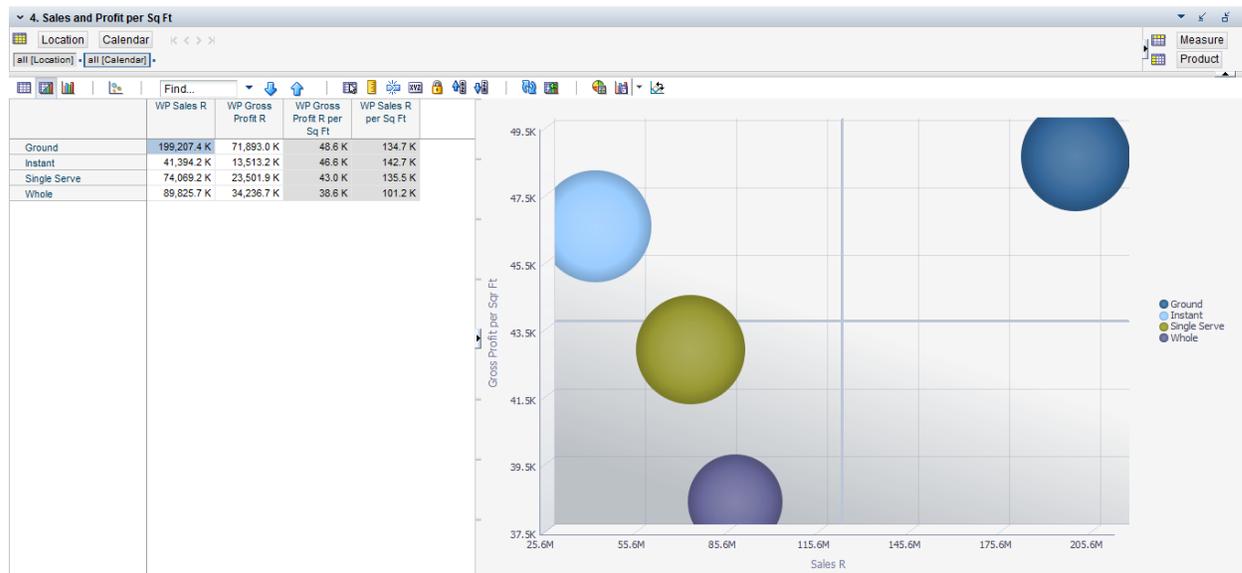
**Figure 7-10 4. Sales and Profit per Sq Ft View**

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

**Table 7-5 4. Sales and Profit per Square Foot Measures**

Label	Definition
WP Gross Profit R	The gross profit retail from the merchandise in the working plan assortment. This measure is different from the WP Assort Gross Profit R measure as it reflects gross profit retail for all items irrespective of whether or not these items are part of the working plan assortment.
WP Gross Profit R per Sq Ft	The gross profit retail return per square feet from the merchandise in the working plan assortment. It is calculated by dividing Gross Profit Retail Value from the merchandise by the area, or space in square feet, allocated to the merchandise.
WP Sales R	The working plan sales retail value. This measure is different from the WP Assort Sales R measure as it reflects the sales retail value for all items irrespective of whether or not these items are part of the working plan assortment.
WP Sales R per Sq Ft	The working plan assortment's sales retail return per square feet. It is calculated by dividing sales retail value by the area, or space in square feet, allocated to that particular merchandise.

## 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.

Market coverage is defined as the extent of sales covered by an assortment or a set of items. In other words, looking at the overall combined market sales (for example, for a trading area) of the products (SKUs/items) in an assortment and determining the overall market share of these products while looking at the whole market, then the market share percentage is the market coverage of the assortment under consideration. Note that the overall combined market sales of a product (SKUs/items) include sales happening for a product at all the retailers competing in the market.

For example, a retailer could be carrying 100 SKUs for a product category out of 150 SKUs sold in the whole market. If the combined market sales of these 100 SKUs have a market share of 90%, the market coverage of the retailer's assortment is 90%.

Market coverage based analysis is based on market data which is sourced from third parties such as Nielsen, IRI, and so on, that provide syndicated data.

The concept of market coverage is used to look at the spread and contribution of sales in the retailer's business compared with the market. It facilitates the determination of target market coverage for a retailer's assortment.

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:](#)
  - [1. Performance Based Fragmentation Market Analysis Data View](#)
  - [2. Performance Based Fragmentation Retail Data Analysis View](#)
- [Item Contribution Analysis Tab:](#)
  - [1. Item Contribution Market View](#)
  - [2. Item Contribution Retailer View](#)
- [Proliferation Analysis Tab:](#)
  - [1. Proliferation Market Analysis View](#)
  - [2. Proliferation Retailer Analysis View](#)
- [Accumulative Ranking Tab:](#)
  - [1. Accumulative Ranking Market Analysis View](#)
  - [2. Accumulative Ranking Retailer Analysis View](#)
- [Market Assessment Tab:](#)
  - [1. Market Share Assessment View](#)
  - [2. Market Sales Trend Analysis View](#)
  - [3. Market Analysis View](#)
- [Market Quadrant Analysis Tab:](#)
  - [1. Market Sales \\$ / Sales Units / Share View](#)
  - [2. Market Share / Growth / Sales Units View](#)

## Set Breakpoint and Performance Drivers Tab

Under this tab, the user defines the measures (metrics) on which Performance Based Fragmentation Analysis, Item Contribution Analysis, Proliferation Analysis, and Accumulative Ranking Analysis should be done. These analyses are described in this chapter.

The user also needs to set the breakpoints to view Performance Based Fragmentation Analysis and Item Contribution Analysis at the retailer level and market level.

This tab has two views.

### Set Breakpoints View

Use this view to set the category breakpoints. Vary the breakpoint thresholds to see the spread or distribution of sales across items in an assortment in fragmentation and item contribution analysis. This view also provides a facility to do What-if analysis for a specific amount or percentage of sales and SKU count to identify the appropriate market coverage for WP assortment.

**Figure 7–11 Set Breakpoints View**

	Contribution Analysis Breakpoints %	Fragmentation Analysis Breakpoints %
50%	50.0 %	50.0 %
75%	75.0 %	75.0 %
80%	80.0 %	80.0 %
85%	85.0 %	85.0 %
90%	90.0 %	90.0 %
95%	95.0 %	95.0 %
99%	99.0 %	99.0 %
What-If 1	100.0 %	100.0 %
What-If 2	100.0 %	100.0 %
What-If 3	100.0 %	100.0 %

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

**Table 7–6 Set Breakpoints Measures**

Label	Definition
Contribution Analysis Breakpoints %	The pre-defined (user-set) breakpoints 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) breakpoints for sales (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 the retailer and market levels for Performance Based Fragmentation Analysis, Item Contribution Analysis, Proliferation Analysis, and Accumulative Ranking Analysis. Selections made here are primarily used as the basis of calculations for fragmentation analysis. The calculations are then also used to

derive the other three analyses previously mentioned. Once this selection is completed, the user needs to run the Fragmentation Analysis custom menu option to populate the respective views.

The selection is done from a drop-down list of measures available for the retail and market levels. The measures, Sales R and Sales U, are available in different forms in the drop-down selection such as LY and Forecast.

**Figure 7–12 Set Performance Metric Driver View**

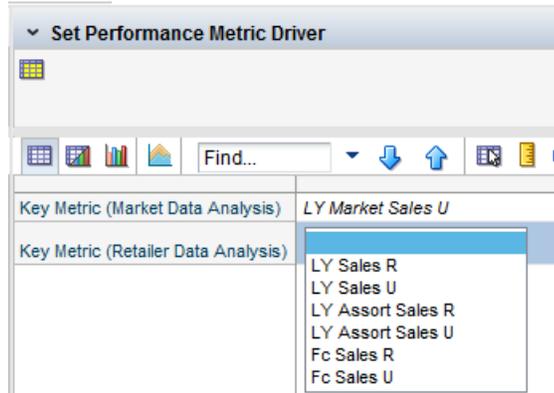


Table 7–7 lists the measures available in this view.

**Table 7–7 Select Performance Metric Driver Measures**

Label	Definition
Key Metric (Market Data Analysis)	<p>The market data measure used to do fragmentation and contribution analysis.</p> <p>For example, for a traffic building category, the use of sales units in the market would be appropriate. For a transaction building category, the use of sales retail in the market would be appropriate.</p>
Key Metric (Retailer Data Analysis)	<p>The retailer data measure used to do fragmentation and contribution analysis.</p> <p>For example, for a traffic building category, the use of sales units at the retailer would be appropriate. For a transaction building category, the use of sales retail at the retailer would be appropriate.</p>

## Performance Based Fragmentation Analysis Tab

### Custom Menu Option

Once the information has been set in the two views under Set Breakpoints and Performance Drivers, you can perform fragmentation analysis. This is done by using the Fragmentation Analysis custom menu option.

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

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

Fragmentation Analysis provides a facility to view the distribution or spread of sales across the SKUs in an assortment. It helps the planner understand how fragmented the category/sub-category sales are.

You can also view and compare the fragmentation of the category at the retailer compared to the fragmentation in the market to understand if the retailer's category sales are more or less fragmented than the market.

Sales are divided into preset levels or ranges based on the breakpoints already defined. The SKU/Item count is viewed against it. The idea is to look at the number of SKUs/Items required to achieve a certain percentage of the overall sales at the category and sub-category level. This analysis is available for the retailer's business and in the overall market's, for example, a trading area, business context as well.

The following figure shows the views for this tab.

**Figure 7-13 Performance Based Fragmentation Analysis Tab**

The screenshot displays two panels from the software. The top panel, titled '1. Performance Based Fragmentation Market Data Analysis', shows data for the Northwest location. The bottom panel, titled '2. Performance Based Fragmentation Retailer Data Analysis', shows data for the Mainstream | Large | A (Northwest) retailer. Both panels feature a table with columns for breakpoints (50%, 75%, 80%, 85%, 90%, 95%, 99%) and a 'What-If 1' column. Each breakpoint column contains two sub-columns: 'Market % Sales of Item Count' and 'Market Item Count to Reach Breakpoint' (or 'Retailer % Sales of Item Count' and 'Retailer Item Count to Reach Breakpoint' for the retailer view).

	50%		75%		80%		85%		90%		95%		99%		What-If 1
	Market % Sales of Item Count	Market Item Count to Reach Breakpoint	Market % Sales of Item Count	Market Item Count to Reach Breakpoint	Market % Sales of Item Count	Market Item Count to Reach Breakpoint	Market % Sales of Item Count	Market Item Count to Reach Breakpoint	Market % Sales of Item Count	Market Item Count to Reach Breakpoint	Market % Sales of Item Count	Market Item Count to Reach Breakpoint	Market % Sales of Item Count	Market Item Count to Reach Breakpoint	
☑ Coffee	50.6 %	32	75.5 %	52	80.2 %	56	85.6 %	61	90.5 %	66	95.4 %	72	99.4 %	78	100.0 %
Ground	52.0 %	16	75.1 %	25	82.3 %	28	86.9 %	30	90.9 %	32	96.0 %	35	100.0 %	38	100.0 %
Instant	59.2 %	4	83.7 %	6	83.7 %	6	93.2 %	7	93.2 %	7	100.0 %	8	100.0 %	8	100.0 %

	50%		75%		80%		85%		90%		95%		99%		What-If 1
	Retailer % Sales of Item Count	Retailer Item Count to Reach Breakpoint	Retailer % Sales of Item Count	Retailer Item Count to Reach Breakpoint	Retailer % Sales of Item Count	Retailer Item Count to Reach Breakpoint	Retailer % Sales of Item Count	Retailer Item Count to Reach Breakpoint	Retailer % Sales of Item Count	Retailer Item Count to Reach Breakpoint	Retailer % Sales of Item Count	Retailer Item Count to Reach Breakpoint	Retailer % Sales of Item Count	Retailer Item Count to Reach Breakpoint	
☑ Coffee	50.4 %	19	75.9 %	34	80.0 %	37	85.5 %	42	90.0 %	47	95.0 %	53	99.5 %	60	100.0 %
Ground	53.4 %	10	77.2 %	17	81.8 %	19	85.8 %	21	91.5 %	24	95.0 %	26	100.0 %	30	100.0 %
Instant	64.3 %	2	84.6 %	4	84.6 %	4	93.0 %	5	93.0 %	5	100.0 %	6	100.0 %	6	100.0 %

### 1. Performance Based Fragmentation Market Analysis Data View

Use this view to analyze the number of the SKUs that represent certain predefined breakpoints, in percentage points, of the market sales.

**Figure 7–14 1. Performance Based Fragmentation Market Data Analysis View**

		Market % Sales of Item Count	Market Item Count to Reach Breakpoint Sales
50%	▼ Coffee	50.5 %	32
	Ground	52.0 %	16
	Instant	59.2 %	4
	Single Serve	52.2 %	6
	Whole	51.1 %	8
75%	▼ Coffee	75.5 %	52
	Ground	75.1 %	25
	Instant	83.7 %	6
	Single Serve	80.3 %	10
	Whole	78.4 %	13
80%	▼ Coffee	80.2 %	56
	Ground	82.3 %	28
	Instant	83.7 %	6
	Single Serve	80.3 %	10
	Whole	83.5 %	14

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

**Table 7–8 1. Performance Based Fragmentation Market Data Analysis 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 on the product category level. Breakpoints are defined for this measure to view the fragmentation analysis.
Market Item Count to Reach Breakpoint Sales	The number of SKUs required in the market (typically trading area) as a whole to reach a preset breakpoint percentage sales of total market sales. For example in Figure 7–14, 32 SKUs contribute to 50% of market sales and 52 SKUs contribute to 75% of market sales.

**2. Performance Based Fragmentation Retail Data Analysis View**

Use this view to analyze the percentage of the SKUs that represent certain predefined breakpoints, in percentage points, of the retailer's sales.

**Figure 7–15 2. Performance Based Fragmentation Retailer Data Analysis View**

		Retailer % Sales of Item Count	Retailer Item Count to Reach Breakpoint Sales
50%	▼ Coffee	50.4 %	19
	Ground	53.4 %	10
	Instant	64.3 %	2
	Single Serve	64.5 %	4
	Whole	50.9 %	6
75%	▼ Coffee	75.9 %	34
	Ground	77.2 %	17
	Instant	84.6 %	4
	Single Serve	77.6 %	5
	Whole	75.7 %	10
80%	▼ Coffee	80.0 %	37
	Ground	81.8 %	19
	Instant	84.6 %	4
	Single Serve	83.2 %	6
	Whole	81.6 %	11

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

**Table 7–9 2. Performance Based Fragmentation Retail Data Analysis Measures**

Label	Definition
Retailer % Sales of Item Count	The contribution towards overall retail sales of the retailer 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. The value of this measure should roughly align with the defined breakpoints.
Retailer Item Count to Reach Breakpoint Sales	The number of items required to reach a preset breakpoint percentage sales of total retailer sales. For example in <a href="#">Figure 7–15</a> , 19 SKUs contribute to 50% of retailer sales and 34 SKUs contribute to 75.9% of retailer sales

## Item Contribution Analysis Tab

Item contribution analyzes the contribution of items to category/sub-category sales. For example, what is the contribution of 50% of the top selling SKUs to the total category sales? Here the breakpoints apply to the percentage of SKUs instead of sales. The following figure shows the views for this tab.

Figure 7–16 Item Contribution Analysis Tab Views

	50%	75%	80%	85%	90%	95%	99%	What-If 1
	Market Item Count of % Sales	Market % Sales to Reach Breakpoint	Market Item Count of % Sales	Market % Sales to Reach Breakpoint	Market Item Count of % Sales	Market % Sales to Reach Breakpoint	Market Item Count of % Sales	Market % Sales to Reach Breakpoint
Coffee	40	60.8 %	60	84.5 %	64	88.6 %	68	92.3 %
Ground	19	59.9 %	29	84.7 %	31	89.0 %	33	92.8 %
Instant	4	59.2 %	6	83.7 %	7	93.2 %	7	93.2 %

	50%	75%	80%	85%	90%	95%	99%	What-If 1
	Retailer % Sales to Reach Breakpoint	Retailer Item Count of % Sales	Retailer % Sales to Reach Breakpoint	Retailer Item Count of % Sales	Retailer % Sales to Reach Breakpoint	Retailer Item Count of % Sales	Retailer % Sales to Reach Breakpoint	Retailer Item Count of % Sales
Coffee	357.6 %	155	445.7 %	230	459.1 %	245	471.2 %	260
Ground	356.2 %	75	448.1 %	115	457.6 %	120	475.2 %	130
Instant	373.8 %	15	465.0 %	25	465.0 %	25	500.0 %	30

### 1. Item Contribution Market View

Use this view to analyze the contribution of SKUs to total Market Category Sales U, Sales R, Gross Profit and so on, based on the user-selected performance metric.

Figure 7–17 1. Item Contribution Market View

	50%	75%	80%	85%	90%	95%	99%	What-If 1	What-If 2	What-If 3
	Market Item Count of % Sales	Market % Sales to Reach Breakpoint	Market Item Count of % Sales	Market % Sales to Reach Breakpoint	Market Item Count of % Sales	Market % Sales to Reach Breakpoint	Market Item Count of % Sales	Market % Sales to Reach Breakpoint	Market Item Count of % Sales	Market % Sales to Reach Breakpoint
Coffee	40	60.8 %	60	84.5 %	64	88.6 %	68	92.3 %	72	95.4 %
Ground	19	59.9 %	29	84.7 %	31	89.0 %	33	92.8 %	35	96.0 %
	4	59.2 %	6	83.7 %	7	93.2 %	7	93.2 %	8	100.0 %
	19	59.9 %	29	84.7 %	31	89.0 %	33	92.8 %	35	96.0 %
	37	98.8 %	38	100.0 %	38	100.0 %	38	100.0 %	38	100.0 %
	38	100.0 %	38	100.0 %	38	100.0 %	38	100.0 %	38	100.0 %
	38	100.0 %	38	100.0 %	38	100.0 %	38	100.0 %	38	100.0 %
	38	100.0 %	38	100.0 %	38	100.0 %	38	100.0 %	38	100.0 %
	38	100.0 %	38	100.0 %	38	100.0 %	38	100.0 %	38	100.0 %
	38	100.0 %	38	100.0 %	38	100.0 %	38	100.0 %	38	100.0 %
	38	100.0 %	38	100.0 %	38	100.0 %	38	100.0 %	38	100.0 %

**Table 7–10 1. Item Contribution Market Measures**

Label	Definition
Market Item Count % of Sales	<p>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 on the product category level. Breakpoints are defined for this measure to view the fragmentation analysis.</p> <p>For example in <a href="#">Figure 7–17</a>, 50% of the Market Item Count of % Sales is 40 SKUs. This corresponds to 50% of the total SKU count in the market, 75% corresponds to 60 SKUs, and 99% corresponds to 79 SKUs.</p>
Market % Sales to Reach Breakpoint	The actual percentage of market sales (in other words, typically, market coverage for a trading area) reached to achieve the preset breakpoint sales level.

[Table 7–10](#) lists the measures available in this view.

## 2. Item Contribution Retailer View

Use this view to analyze the contribution of SKUs to total Retailer Category Sales U, Sales R, Gross Profit, and so on, based on the user-selected performance metric.

**Figure 7–18 2. Item Contribution Retailer View**

		Retailer Item Count of % Sales	Retailer % Sales to Reach Breakpoint
▼ Coffee	50%	31	72.5 %
	75%	46	89.9 %
	80%	49	92.6 %
	85%	52	95.0 %
	90%	55	97.1 %
	95%	58	98.9 %
	99%	61	100.0 %
	What-If 1	61	100.0 %
	What-If 2	61	100.0 %
	What-If 3	61	100.0 %
Ground	50%	15	69.8 %
	75%	23	90.1 %
	80%	24	91.9 %
	85%	26	95.2 %
	90%	27	96.7 %
	95%	29	99.3 %
	99%	30	100.0 %
	What-If 1	30	100.0 %
	What-If 2	30	100.0 %
	What-If 3	30	100.0 %

[Table 7–11](#) lists the measures available in this view.

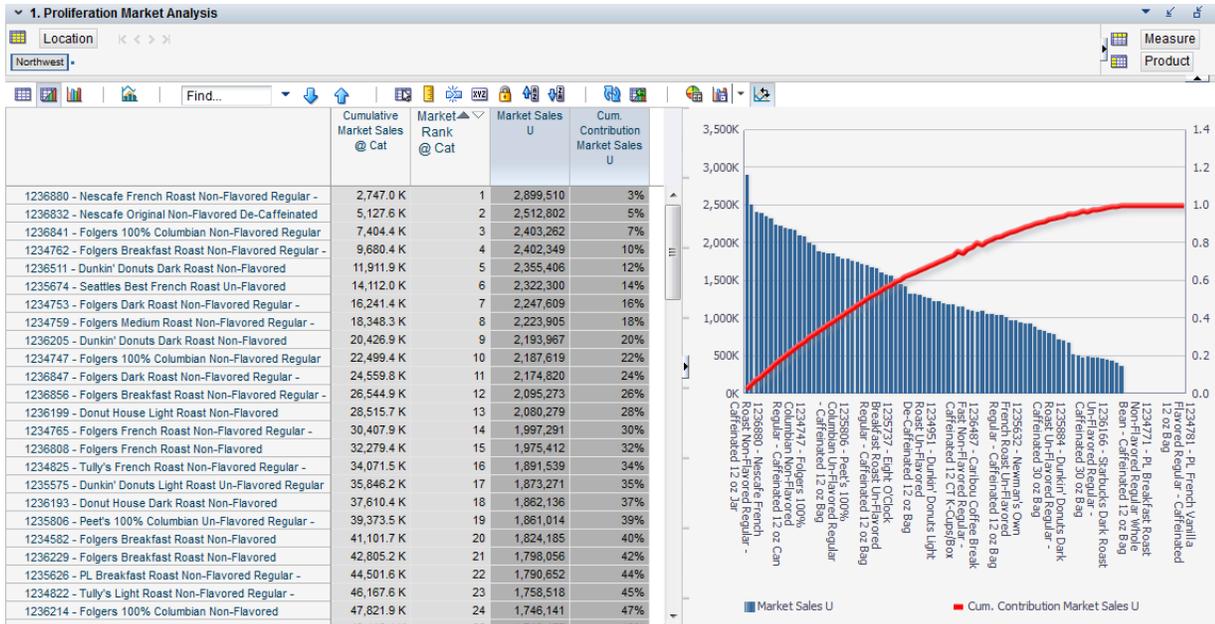
**Table 7–11 2. Item Contribution Retailer Measures**

Label	Definition
Retailer % Sales to Reach Breakpoint	The percentage of retailer sales (trading area sales) achieved by the number of SKUs that correspond to the preset breakpoint. Note the breakpoint is expressed as a % SKU count. For example in <a href="#">Figure 7–18</a> , 50% of SKUs constitute 31 retailer SKUs and contribute to 72.5% of the total category sales.
Retailer Item Count of % Sales	SKU count corresponding to each breakpoint (where the breakpoint is expressed as a percentage of retailer SKU counts).

### Proliferation Analysis Tab

Proliferation Analysis provides a view to analyze cumulative sales across the product hierarchy against the SKU count.

**Figure 7–19 1. Proliferation Analysis Market View**



This view is achievable by first creating an extended measure from Market Sales U as a Cumulative Percentage measure called SKU Contribution to Market Sales, with the Order specified as High to Low. This is shown in [Figure 7–20](#).

Figure 7–20 Creating an Extended Measure

The screenshot displays a software interface for market analysis. At the top, there's a title bar '1. Proliferation Market Analysis' and a 'Location' dropdown set to 'Northwest'. Below this is a toolbar with various icons and a 'Find...' search box. The main area is a table with columns: 'Cumulative Market Sales @ Cat', 'Market Rank @ Cat', and 'Market Sales U'. A context menu is open over the 'Market Sales U' column, showing options like 'Selection Options', 'Measure Status...', 'Hide Selected Member(s)', 'Show and Hide...', 'Extended Measure', 'Cut', 'Copy', 'Paste', 'Lock', 'Revert Cell', 'Attributes', 'Level splitting', 'Position Filtering', 'Find...', 'Format', and 'Undo Sort'. The 'Extended Measure' option is highlighted, and a 'Create...' button is visible next to it. Below the table, a 'Create Extended measure' dialog box is open, showing the following configuration:

- \* Label: SKU Contribution to Market Sal
- \* Type:  Relative Percent of Parent,  Absolute Percent of Parent,  Ranking,  Cumulative Sum,  Cumulative Percent
- \* Measure: Market Sales U
- \* Dimension: Product
- \* Order:  Low to High,  High to Low
- \* Display For:  Only base level,  All visible levels
- \* Apply To: 1. Proliferation Market Analy

Buttons for 'Create' and 'Cancel' are at the bottom right of the dialog.

Figure 7–21 shows the Proliferation Market Analysis view updated with the extended measure.

**Figure 7-21 Proliferation Market Analysis View with Extended Measure**

1. Proliferation Market Analysis				
Location: Northwest				
	Cumulative Market Sales @ Cat	Market Rank @ Cat	Market Sales U	SKU Contribution Market Sales U
1236880 - Nescafe French Roast Non-Flavored Regular -	2,747.0 K	1	2,899,510	3%
1236832 - Nescafe Original Non-Flavored De-Caffeinated	5,127.6 K	2	2,512,802	5%
1236841 - Folgers 100% Columbian Non-Flavored Regular	7,404.4 K	3	2,403,262	7%
1234762 - Folgers Breakfast Roast Non-Flavored Regular -	9,680.4 K	4	2,402,349	10%
1236511 - Dunkin' Donuts Dark Roast Non-Flavored	11,911.9 K	5	2,355,406	12%
1235674 - Seattles Best French Roast Un-Flavored	14,112.0 K	6	2,322,300	14%
1234753 - Folgers Dark Roast Non-Flavored Regular -	16,241.4 K	7	2,247,609	16%
1234759 - Folgers Medium Roast Non-Flavored Regular -	18,348.3 K	8	2,223,905	18%
1236205 - Dunkin' Donuts Dark Roast Non-Flavored	20,426.9 K	9	2,193,967	20%
1234747 - Folgers 100% Columbian Non-Flavored Regular	22,499.4 K	10	2,187,619	22%
1236847 - Folgers Dark Roast Non-Flavored Regular -	24,559.8 K	11	2,174,820	24%
1236856 - Folgers Breakfast Roast Non-Flavored Regular -	26,544.9 K	12	2,095,273	26%
1236199 - Donut House Light Roast Non-Flavored	28,515.7 K	13	2,080,279	28%
1234765 - Folgers French Roast Non-Flavored Regular -	30,407.9 K	14	1,997,291	30%
1236808 - Folgers French Roast Non-Flavored	32,279.4 K	15	1,975,412	32%
1234825 - Tully's French Roast Non-Flavored Regular -	34,071.5 K	16	1,891,539	34%

When viewing the data in split view as a combination chart on Market Sales U and SKU Contribution Market Sales U measures, be sure to change the axis to a dual Y-axis from the chart formatting options shown in [Figure 7-22](#).

**Figure 7-22 Chart Formatting Options**

**Chart Formatting**

General | **Axis** | Series

Select Series

- All
- Market Sales U
- SKU Contribution Market Sales U

Series Color ■

---

Series Y-Axis Assignment

**Y1-Axis**

Market Sales U

➤

➤➤

➤

➤➤

**Y2-Axis**

SKU Contribution Market Sales U

### 1. Proliferation Market Analysis View

Use this view to analyze the cumulative contribution of SKUs towards the overall market sales. Cumulative market actual sales are presented against the SKU count. A forecast is not available for market sales. This information is best displayed as a Pareto chart. For an example of this view, see Figure 7-19.

Table 7-12 lists the measures available in this view.

**Table 7-12 1. 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 category or sub-category level. It is shown against the number of items to analyze the market coverage from a sales quantity perspective.
Cumulative Market Sales @ Cat	

### 2. Proliferation Retailer Analysis View

Use this view to analyze the cumulative contribution of SKUs towards a retailer's sales. The cumulative retailer's actual sales are presented against the SKU count. This information is best displayed as a Pareto chart.

**Figure 7-23 2. Proliferation Retailer Analysis View**

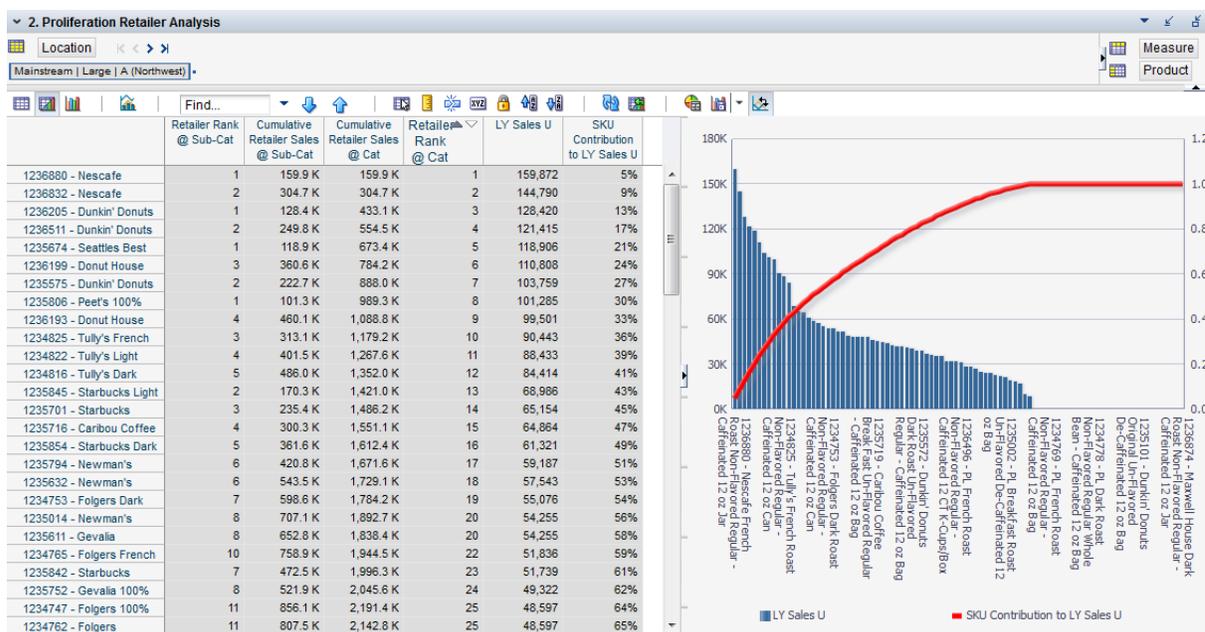


Table 7-13 lists the measures available in this view.

**Table 7-13 2. 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 category or sub-category level. It is shown against the number of items to analyze the market coverage from a sales quantity perspective.
Cumulative Retailer Sales @ Cat	The sales quantity is based on the user-selected performance metric driver.

**Table 7–13 (Cont.) 2. Proliferation Retailer Analysis Measures**

Label	Definition
Retailer Rank @ Cat	Rank of the SKU based on the user-selected performance metric driver.
Retailer Rank @ Sub-Cat	

## Accumulative Ranking Tab

Accumulative ranking analysis provides a view to the cumulative sales of a category and sub-category compared with the rank of a SKU in the sub-category based on its sales contribution to the category or sub-category. It compares the rank of a SKU in the sub-category and its rank in the overall category. This analysis, like all other analysis, is available at the retailer level and in market context.

### 1. Accumulative Ranking Market Analysis View

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

**Figure 7–24 1. Accumulative Ranking Market Analysis View**

	Cumulative Market Sales @ Sub-Cat	Market Rank @ Sub-Cat	Cumulative Market Sales @ Cat	Market Rank @ Cat	Market Sales U
<b>Coffee</b>	1,634,427.9 K	14	5,078,281.3 K	40	107,150,950
<b>Instant</b>	79,807.5 K	5	250,861.1 K	18	16,356,257
1236880 - Nescafe French Roast Non-Flavored Regular - Caffeinated 12 oz Jar	2,747.0 K	1	2,747.0 K	1	2,899,510
1236832 - Nescafe Original Non-Flavored De-Caffeinated 12 oz Jar	5,127.6 K	2	5,127.6 K	2	2,512,802
1236841 - Folgers 100% Columbian Non-Flavored Regular - Caffeinated 12 oz Jar	7,404.4 K	3	7,404.4 K	3	2,403,262
1236847 - Folgers Dark Roast Non-Flavored Regular - Caffeinated 12 oz Jar	9,464.8 K	4	24,559.8 K	11	2,174,820
1236856 - Folgers Breakfast Roast Non-Flavored Regular - Caffeinated 12 oz Jar	11,449.9 K	5	26,544.9 K	12	2,095,273
1236808 - Folgers French Roast Non-Flavored De-Caffeinated 12 oz Jar	13,321.4 K	6	32,279.4 K	15	1,975,412
1236823 - Maxwell House Dark Roast Non-Flavored De-Caffeinated 12 oz Jar	14,825.9 K	7	55,745.5 K	29	1,609,884
1236874 - Maxwell House Dark Roast Non-Flavored Regular - Caffeinated 12 oz Jar	15,466.4 K	8	96,452.5 K	68	685,295
<b>Single Serve</b>	198,695.4 K	8	897,893.7 K	37	21,362,435
1236511 - Dunkin' Donuts Dark Roast Non-Flavored Regular - Caffeinated 12 CT K-Cups/Box	2,231.5 K	1	11,911.9 K	5	2,355,406
1236205 - Dunkin' Donuts Dark Roast Non-Flavored De-Caffeinated 12 CT K-Cups/Box	4,310.0 K	2	20,426.9 K	9	2,193,967
1236199 - Donut House Light Roast Non-Flavored De-Caffeinated 12 CT K-Cups/Box	6,280.9 K	3	28,515.7 K	13	2,080,279
1236193 - Donut House Dark Roast Non-Flavored De-Caffeinated 12 CT K-Cups/Box	8,045.1 K	4	37,610.4 K	18	1,862,136
1236229 - Folgers Breakfast Roast Non-Flavored De-Caffeinated 12 CT K-Cups/Box	9,748.5 K	5	42,805.2 K	21	1,798,056
1236214 - Folgers 100% Columbian Non-Flavored De-Caffeinated 12 CT K-Cups/Box	11,402.8 K	6	47,821.9 K	24	1,746,141
1236544 - PL Breakfast Roast Non-Flavored Regular - Caffeinated 12 CT K-Cups/Box	13,029.0 K	7	49,448.1 K	25	1,716,477
1236496 - PL French Roast Non-Flavored Regular - Caffeinated 12 CT K-Cups/Box	14,620.4 K	8	52,662.6 K	27	1,679,722
1236238 - PL Breakfast Roast Non-Flavored De-Caffeinated 12 CT K-Cups/Box	15,867.4 K	9	64,154.9 K	35	1,334,355
1236487 - Caribou Coffee Break Fast Non-Flavored Regular - Caffeinated 12 CT K-Cups/Box	16,946.9 K	10	76,945.1 K	46	1,155,024
1236235 - PL Medium Roast Non-Flavored De-Caffeinated 12 CT K-Cups/Box	17,971.9 K	11	81,095.5 K	50	1,096,801
1236190 - PL French Roast Non-Flavored De-Caffeinated 12 CT K-Cups/Box	18,878.0 K	12	87,861.8 K	57	969,504
1236840 - Caribou Coffee Break Fast Non-Flavored Regular - Caffeinated 48 CT K-Cups/Box	19,362.0 K	13	97,432.1 K	70	517,824
1236664 - Dunkin' Donuts Dark Roast Non-Flavored Regular - Caffeinated 48 CT K-Cups/Box	19,827.3 K	14	97,897.5 K	71	491,190
1236367 - Folgers 100% Columbian Non-Flavored De-Caffeinated 48 CT K-Cups/Box	20,173.6 K	15	101,304.3 K	79	365,555
<b>Whole</b>	200,153.2 K	10	1,438,471.9 K	52	18,579,693
1235806 - Peet's 100% Columbian Un-Flavored Regular - Caffeinated 12 oz Bag	1,763.1 K	1	39,373.5 K	19	1,861,014
1235737 - Eight O'Clock Breakfast Roast Un-Flavored Regular - Caffeinated 12 oz Bag	3,341.5 K	2	54,241.0 K	28	1,866,038
1235845 - Starbucks Light Roast Un-Flavored Regular - Caffeinated 12 oz Bag	4,553.7 K	3	67,855.4 K	38	1,279,460
1235701 - Starbucks Original Un-Flavored Regular - Caffeinated 12 oz Bag	5,751.8 K	4	69,053.5 K	39	1,264,616
1235842 - Starbucks Breakfast Roast Un-Flavored Regular - Caffeinated 12 oz Bag	6,921.1 K	5	70,222.8 K	40	1,234,261
1235716 - Caribou Coffee Light Roast Un-Flavored Regular - Caffeinated 12 oz Bag	8,085.6 K	6	71,387.4 K	41	1,229,195

Table 7–14 lists the measures available in this view.

**Table 7–14 1. Accumulative Market Analysis Measures**

Label	Definition
Cumulative Market Sales @ Sub-Cat	Reflects the cumulative sales quantity of the market at the sub-category level. It is shown against the number of items to analyze the market coverage from a sales quantity perspective.
Market Rank @Sub Cat	Rank of the SKU within the sub-category in the market based on the user-selected performance metric driver for Market Data Analysis.

## 2. Accumulative Ranking Retailer Analysis View

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

**Figure 7–25 2. Accumulative Ranking Retailer Analysis View**

	Cumulative Retailer Sales @ Sub-Cat	Retailer Rank @ Sub-Cat	Cumulative Retailer Sales @ Cat	Retailer Rank @ Cat	LY Sales U
<b>2. Accumulative Ranking Retailer Analysis</b>					
Location: Mainstream   Large   A (Northwest)					
<b>☑ Coffee</b>	42,243.1 K	11	134,027.6 K	31	3,278,737
<b>☑ Instant</b>	2,123.8 K	4	10,481.1 K	24	469,891
1236880 - Nescafe French Roast Non-Flavored	159.9 K	1	159.9 K	1	159,872
1236832 - Nescafe Original Non-Flavored	304.7 K	2	304.7 K	2	144,790
1236856 - Folgers Breakfast Roast	353.3 K	3	2,094.2 K	25	48,597
1236847 - Folgers Dark Roast Non-Flavored	398.6 K	4	2,330.9 K	30	45,357
1236841 - Folgers 100% Colombian	437.5 K	5	2,707.2 K	39	38,877
1236808 - Folgers French Roast Non-Flavored	469.9 K	6	2,884.2 K	44	32,398
<b>☑ Single Serve</b>	4,636.2 K	6	20,802.4 K	31	626,822
1236205 - Dunkin' Donuts Dark Roast	128.4 K	1	433.1 K	3	128,420
1236511 - Dunkin' Donuts Dark Roast	249.8 K	2	554.5 K	4	121,415
1236199 - Donut House Light Roast	360.6 K	3	784.2 K	6	110,808
1236193 - Donut House Dark Roast	460.1 K	4	1,088.8 K	9	99,501
1236214 - Folgers 100% Colombian	501.4 K	5	2,588.3 K	36	41,290
1236496 - PL French Roast Non-Flavored	533.2 K	6	2,948.3 K	46	31,730
1236229 - Folgers Breakfast Roast	564.7 K	7	2,979.9 K	47	31,574
1236664 - Dunkin' Donuts Dark Roast	593.3 K	8	3,008.5 K	48	28,576
1236544 - PL Breakfast Roast Non-Flavored	617.7 K	9	3,138.1 K	53	24,408
1236367 - Folgers 100% Colombian	626.8 K	10	3,278.7 K	61	9,099
<b>☑ Whole</b>	7,367.1 K	8	31,936.3 K	28	766,954
1235806 - Peet's 100% Colombian Un-Flavored	101.3 K	1	989.3 K	8	101,285
1235845 - Starbucks Light Roast Un-Flavored	170.3 K	2	1,421.0 K	13	68,986

Table 7–15 lists the measures available in this view.

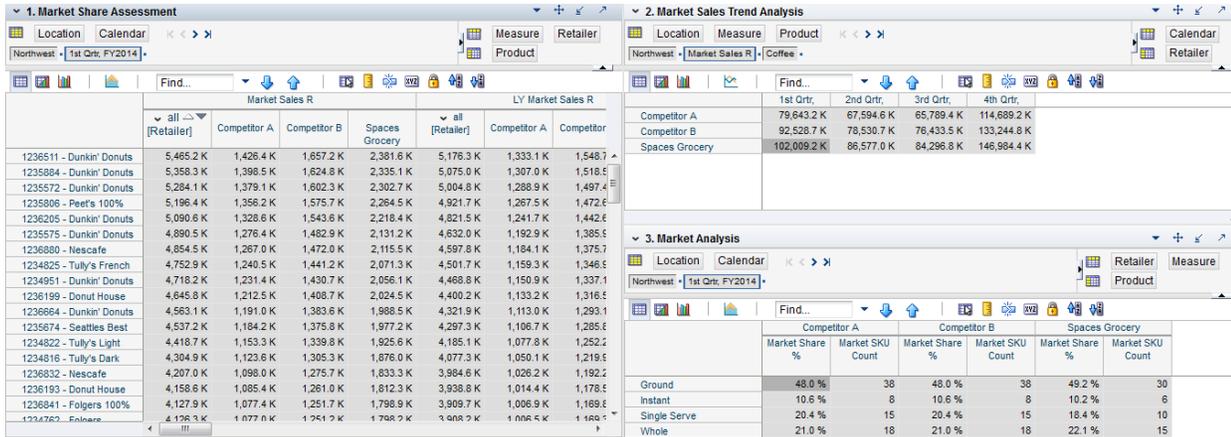
**Table 7–15 2. Accumulative Ranking Retailer Analysis Measures**

Label	Definition
Cumulative Retailer Sales @ Sub Cat	Reflects the cumulative sales quantity of the retailer at the sub-category level. It is shown against the number of items to analyze the market coverage from a sales quantity perspective.
Retailer Rank @ Sub Cat	Rank of the SKU within the sub-category based on the user-selected performance metric driver for Retailer Data Analysis.

## Market Assessment Tab

The Market Assessment tab provides a snapshot about the retailer's standing in the market compared with its main competitors and the rest of the market. The user is able to assess the retailer's relative position to the market in terms of various retail business parameters such as market share, market growth, and other market trends. The following figure shows the views for this tab.

Figure 7–26 Market Assessment Tab Views



### 1. Market Share Assessment View

Use this view to analyze the market shares and growth rates of the retailer compared with its competitors individually and the rest of the market at the item level.

Figure 7–27 1. Market Share Assessment View

	1234582 -	1234600 -	1234615 -	1234747 -	1234753 -	1234759 -	1234762 -	1234765 -	1234768 - PL
Market Sales R	764.3 K	1,006.5 K	1,077.8 K	916.5 K	941.7 K	931.7 K	1,006.5 K	836.8 K	878.0 K
LY Market Sales R	764.3 K	1,006.5 K	1,077.8 K	916.5 K	941.7 K	931.7 K	1,006.5 K	836.8 K	878.0 K
Market Share %	1.0 %	1.4 %	1.4 %	1.2 %	1.3 %	1.3 %	1.4 %	1.1 %	1.2 %
Retailer Market Share %	25.8 %	46.3 %	46.3 %	25.8 %	25.8 %	25.8 %	25.8 %	25.8 %	25.8 %
LY Market Share %	1.0 %	1.4 %	1.4 %	1.2 %	1.3 %	1.3 %	1.4 %	1.1 %	1.2 %
LY Retailer Market Share %	25.8 %	46.3 %	46.3 %	25.8 %	25.8 %	25.8 %	25.8 %	25.8 %	25.8 %
Market Sales Growth %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Market Sales var to LY R	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Market SKU Count	1	1	1	1	1	1	1	1	1
LY Market SKU Count	1	1	1	1	1	1	1	1	1
Market SKU Count var to LY	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %

Table 7–16 lists the measures available in this view.

Table 7–16 1. Market Share Assessment Measures

Label	Definition
Market Sales R	The sales retail value of the merchandise in the market, typically at the trading area level or above. This information is sourced from third parties providing syndicated data such as, Nielsen, IRI, and so on, on a quarterly basis.
LY Market Sales R	Last year's sales retail value of the merchandise in the market, typically at the trading area level or above. This information is sourced from third parties providing syndicated data such as, Nielsen, IRI, and so on, on a quarterly basis. Note, when planning ahead, since Market data is not available for future time-frames, the LY version of market data can be leveraged to gain insights on market data, same time last year.
Market Share %	The quantum or percentage of sales generated by a particular product or a product segment (such as a sub-category) towards the overall sales retail of the sub-category, category, and so on.

**Table 7–16 (Cont.) 1. Market Share Assessment Measures**

Label	Definition
Retailer Market Share %	The retailer's sales retail value share of the overall market for a sub-category or a category.
LY Market Share %	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 %	The retailer's last year's sales retail value share of the overall market for a sub-category or category during the same time period.
Market Sales Growth %	The percentage increase or decrease in sales retail volume for the entire market compared to the previous time period.
Market Sales var to LY R	The variance of sales retail for the market compared with last year's market sales retail.
Market SKU Count	The total number of SKUs selling in the market, typically at the trading area level or above. This information is sourced from third parties providing syndicated data such as, Nielsen, IRI, and so on, on a quarterly basis.
LY Market SKU Count	The total number of SKUs selling in the market (typically at the trading area level or above) in last year's time frame. It is sourced from third parties providing syndicated data such as Nielsen, IRI, and so on, on a quarterly basis.
Market SKU Count var to LY	Market's SKU count variance to the SKU count in last year's assortment.

## 2. Market Sales Trend Analysis View

Use this view to analyze trends to see the variance between the retailer's sales, gross profit, and growth compared with the competition over a period of time.

**Figure 7–28 2. Market Sales Trend Analysis View**

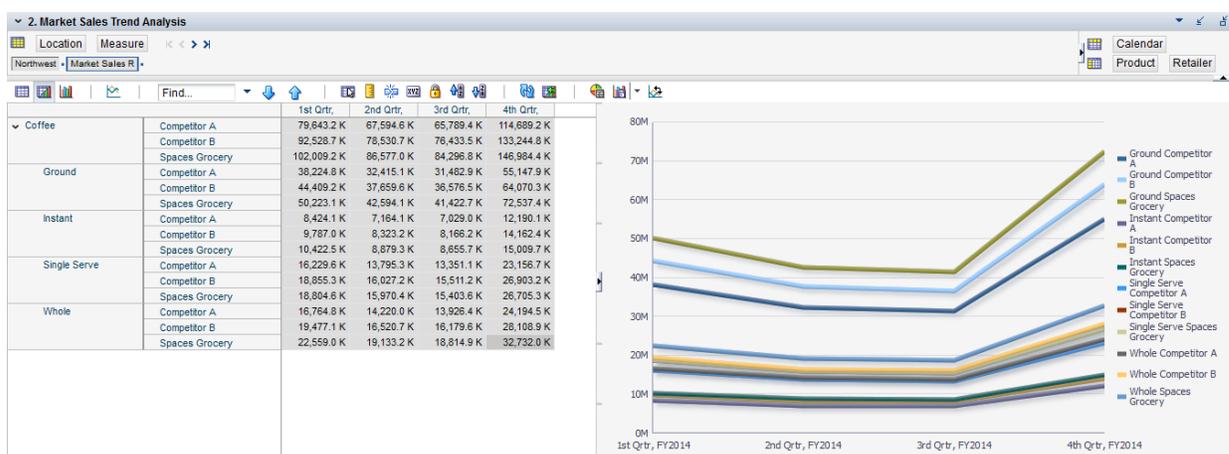


Table 7–17 lists the measures available in this view.

**Table 7-17 2. Market Sales Trend Analysis Measures**

<b>Label</b>	<b>Definition</b>
Market Sales R	The sales retail value of the merchandise in the market, typically at the trading area level or above. This information is sourced from third parties providing syndicated data such as, Nielsen, IRI, and so on, on a quarterly basis.
Market Sales U	The sales units of the merchandise in the market, typically at the trading area level and above. This information is sourced from third parties providing syndicated data such as, Nielsen, IRI, and so on, on a quarterly basis.
WP Sales R	The working plan assortment's sales retail value.
WP Sales U	The working plan assortment's sales units.
WP Sales AUR	Average unit retail value for an item in a working plan. It reflects the average selling price of a SKU at different product hierarchy levels in the working plan assortment.
WP Gross Profit R	The gross profit retail from the merchandise in the working plan assortment. This measure is different from the WP Assort Gross Profit R measure as it reflects gross profit retail for all items irrespective of whether or not these items are part of the working plan assortment.
WP Gross Profit %	The gross profit percentage from the merchandise in the working plan assortment. This measure is different from the WP Assort Gross Profit % measure as it reflects gross profit percentage for all items irrespective of whether or not these items are part of the working plan assortment.
LY Market Sales R	Last year's sales retail value of the merchandise in the market, typically at the trading area level or above. This information is sourced from third parties providing syndicated data such as, Nielsen, IRI, and so on, on a quarterly basis.
LY Market Sales U	Last year's sales units of the merchandise in the market, typically at the trading area level or above. It is sourced from third parties providing syndicated data such as, Nielsen, IRI, and so on, on a quarterly basis.
Market Sales Growth %	The percentage increase or decrease in sales retail volume for the entire market compared to the previous time period.
LY Sales U	Last year's assortment's sales units.
LY Sales R	Last year's assortment's sales retail value.
LY Sales AUR	Last year's actual average unit retail value of a SKU. It reflects the average selling price of a SKU at a specific product hierarchy level based on last year's actual sales.
WP Sales var to LY R	The working plan's sales retail value's variance to the same in last year's actuals.
WP Sales var to LY U	The working plan's sales units' variance to the same in last year's actuals.

### 3. 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 compared with the competition. This view is available at the sub-category level.

**Figure 7–29 3. Market Analysis View**

	Competitor A		Competitor B		Spaces Grocery	
	Market Share %	Market SKU Count	Market Share %	Market SKU Count	Market Share %	Market SKU Count
Ground	48.0 %	38	48.0 %	38	49.2 %	30
Instant	10.6 %	8	10.6 %	8	10.2 %	6
Single Serve	20.4 %	15	20.4 %	15	18.4 %	10
Whole	21.0 %	18	21.0 %	18	22.1 %	15

Table 7–18 lists the measures available in this view.

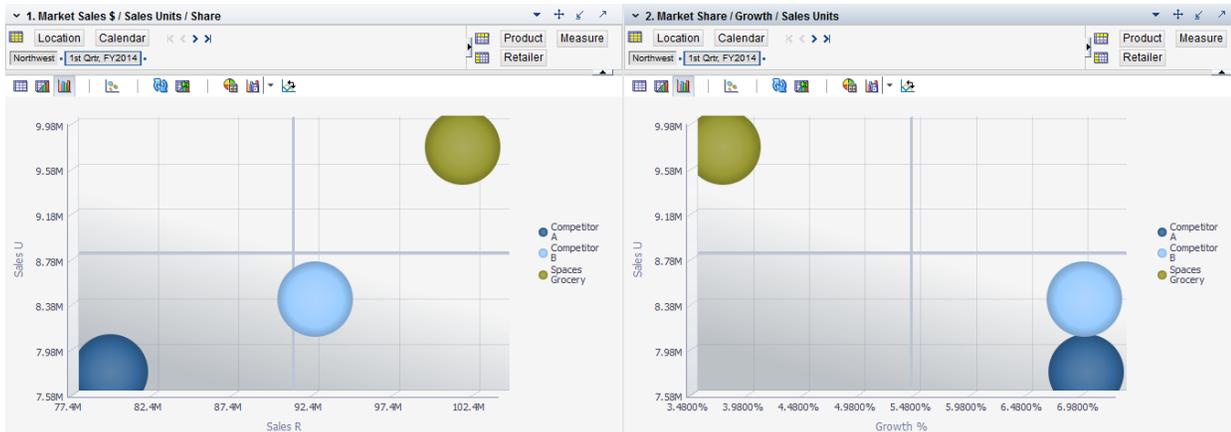
**Table 7–18 3. Market Analysis Measures**

Label	Definition
Market Share %	The quantum or percentage of sales generated by a particular product or a product segment, such as a sub-category, towards the overall sales retail of the sub-category, category, and so on.
Market SKU Count	The total number of SKUs selling in the market, typically at the trading area level or above. This information is sourced from third parties providing syndicated data on a quarterly basis.
LY Assort SKU Count	The total number of SKUs in last year's assortment.
WP Assort SKU Count	The total number of SKUs in the working plan's assortment for the cluster.
LY Market SKU Count	The total number of SKUs selling in the market, typically at the trading area level or above, in last year's time frame. It is sourced from third parties providing syndicated data such as Nielsen, IRI, and so on, on a quarterly basis.
Market SKU Count var to LY	The market's SKU count variance to the SKU count in last year's assortment.
WP Assort SKU Count var to LY	The Working Plan Assortment's SKU count variance to the SKU count in last year's assortment.

## Market Quadrant Analysis Tab

The following figure shows the views for this tab.

**Figure 7–30 Market Quadrant Analysis Tab Views**



Analyzing in quadrants provides a view of how the retailer is performing compared to the competition and rest of market. For example, Space Grocery is in the higher Sales R and Sales U quadrant, however from a market growth percentage perspective, it is lagging its competition.

**1. 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 of the category’s business from a large market perspective where the retailer is competing. For an example of this view, see [Figure 7–30](#).

[Table 7–19](#) lists the measures available in this view.

**Table 7–19 1. Market Sales \$ / Sales Units / Share Measures**

Label	Definition
Market Sales R	The sales retail value of the merchandise in the market, typically at the trading area level or above. This information is sourced from third parties providing syndicated data such as, Nielsen, IRI, and so on, on a quarterly basis.
Market Sales U	The sales units of the merchandise in the market, typically at the trading area level and above. This information is sourced from third parties providing syndicated data such as, Nielsen, IRI, and so on, on a quarterly basis.
Market Share %	The quantum or percentage of sales generated by a particular product or a product segment (such as a sub-category) towards the overall sales retail of the sub-category, category, and so on.

**2. 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 of the category’s business from a larger market perspective where the retailer competes.

**Figure 7–31 2. Market Share / Growth / Sales Units View**

		Competitor A	Competitor B	Competitor C	Competitor D	Competitor E	Rest of	Spaces
Market Sales Growth %	Coffee	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Market Sales U	Coffee	7,272,682	7,886,055	0	0	0	0	9,445,552
Market Share %	Coffee	100.0 %	100.0 %	0.0 %	0.0 %	0.0 %	0.0 %	100.0 %

Table 7–20 lists the measures available in this view.

**Table 7–20 2. Market Share / Growth / Sales Units Measures**

Label	Definition
Market Sales Growth %	The percentage increase or decrease in sales retail volume for the entire market compared to the previous time period.
Market Sales U	The sales units of the merchandise in the market, typically at the trading area level and above. This information is sourced from third parties providing syndicated data such as, Nielsen, IRI, and so on, on a quarterly basis.
Market Share %	The quantum or percentage of sales generated by a particular product or a product segment (such as a sub-category) towards the overall sales retail of the sub-category, category, and so on.

## 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:**
  - 1. Purchase Behavior Analysis View
  - 2. Consumer Loyalty Analysis View
  - 3. Top Shopper Analysis View
- **Where is the Consumer Purchasing? Tab:**
  - 1. Retail Channel Share Analysis View
  - 2. 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 profiles. Consumer profiles typically represent a combination of demographic and lifestyle attributes of the consumers shopping the market or trading area. In Figure 7–32, the consumers are profiled based on their children’s ages, head of household age,

household income, and household size. Often times, a combination of these attributes is used to develop lifecycle-based consumer segments such as Empty Nesters, Middle Aged Family, and so on.

**Figure 7–32 Consumer Segment Analysis View**

	Market Trading Area HH %	Market Trading Area Spend %	Retailer Trading Area HH %	Retailer Trading Area Spend %
Children's Ages	100.0 %	100.0 %	100.0 %	100.0 %
Any 0-5	47.0 %	46.0 %	49.0 %	48.0 %
Any 6-12	23.0 %	23.0 %	21.0 %	20.0 %
Any 13-17	14.0 %	15.0 %	17.0 %	19.0 %
None <18	16.0 %	16.0 %	13.0 %	13.0 %
Head of Household Age	100.0 %	100.0 %	100.0 %	100.0 %
18-24	16.0 %	17.0 %	18.0 %	19.0 %
25-34	20.0 %	21.0 %	21.0 %	22.0 %
35-50	23.0 %	23.0 %	24.0 %	24.0 %
51-60	15.0 %	15.0 %	13.0 %	13.0 %
61-67	14.0 %	13.0 %	13.0 %	12.0 %
68+	12.0 %	11.0 %	11.0 %	10.0 %
Household Income	100.0 %	100.0 %	100.0 %	100.0 %
\$0 - \$19,999	4.0 %	3.0 %	4.0 %	4.0 %
\$20,000 - \$29,999	6.0 %	5.0 %	8.0 %	8.0 %
\$30,000 - \$39,999	8.0 %	8.0 %	10.0 %	12.0 %
\$40,000 - \$49,999	9.0 %	9.0 %	10.0 %	12.0 %
\$50,000 - \$69,999	10.0 %	11.0 %	11.0 %	12.0 %
\$70,000 - \$89,999	14.0 %	13.0 %	12.0 %	11.0 %
\$90,000 - \$109,999	16.0 %	17.0 %	14.0 %	13.0 %
\$110,000 - \$149,999	15.0 %	16.0 %	14.0 %	12.0 %
\$150,000+	18.0 %	18.0 %	17.0 %	16.0 %
Household Size	100.0 %	100.0 %	100.0 %	100.0 %

For example, the 90,000-109,000 household income group represents 16% of the market and they encompass 17% of the total spend in the market, however, they only represent 14% of the retailer's consumers and 13% of the spend at the retailer. So this could present an opportunity of growth for the retailer.

Table 7–21 lists the measures available in this view.

**Table 7–21 Consumer Segment Analysis Measures**

Label	Definition
Market Trading Area HH %	The percentage of market households that belong to a specific consumer segment profile.
Market Trading Area Spend %	The percentage of overall market spend produced by a specific consumer segment profile.
Retailer Trading Area HH %	The percentage of market households which shop at the retailer and belong to a specific consumer segment profile.
Retailer Trading Area Spend %	The share of spend by this consumer profile at the retailer.

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

This tab contains three views.

## 1. Purchase Behavior Analysis View

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

**Figure 7–33 1. Purchase Behavior Analysis View**

	% Item Spend on Promo	Item Penetration %	Item Revenue per Buyer	Item Spend per Item per Trip	Item Trips per Buyer
▼ Coffee	30.0 %	32.0 %	191.31	13.67	14.00
▼ Ground	0.0 %	0.0 %	0.00	0.00	0.00
1234582 -	50.0 %	48.5 %	317.38	7.70	41.22
1234600 -	0.0 %	0.0 %	0.00	0.00	0.00
1234615 -	0.0 %	0.0 %	0.00	0.00	0.00
1234747 -	50.0 %	48.5 %	317.38	7.70	41.22
1234753 -	50.0 %	48.5 %	317.38	7.70	41.22
1234759 -	50.0 %	48.5 %	317.38	7.70	41.22
1234762 -	50.0 %	48.5 %	317.38	7.70	41.22
1234765 -	50.0 %	48.5 %	317.38	7.70	41.22
1234768 - PL	31.8 %	7.4 %	22.74	7.99	2.85

Table 7–22 lists the measures available in this view.

**Table 7–22 1. Purchase Behavior Analysis Measures**

Label	Definition
% Item Spend on Promo	The percentage of an item's total sales generated when the item was put on a promotion.
Item Penetration %	The percentage of households from a specific market/region/trading area that purchased an item or an item from a product group at least once within a given time frame.
Item Revenue per Buyer	An item's average retail sales per customer, buyer, or shopper.
Item Spend per Item per Trip	An item's retail sales value per customer's trip.
Item Trips per Buyer	The average number of times a customer makes a shopping trip for a particular item or a set of merchandise.

## 2. 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 7–34 2. Consumer Loyalty Analysis View**

	Loyalty Index		Market Basket Index	
	Soccer Moms	Value Seekers	Soccer Moms	Value Seekers
▼ Coffee	1.12	1.23	1.13	1.13
▼ Ground	1.05	1.21	1.05	1.17
1234582 -	0.88	1.85	0.90	1.80
1234600 -	0.00	0.00	0.00	0.00
1234615 -	0.00	0.00	0.00	0.00
1234747 -	0.88	1.85	0.90	1.80
1234753 -	0.88	1.85	0.90	1.80
1234759 -	0.88	1.85	0.90	1.80
1234762 -	0.88	1.85	0.90	1.80
1234765 -	0.88	1.85	0.90	1.80
1234768 - PI	1.10	1.39	0.88	1.68

Table 7–23 lists the measures available in this view.

**Table 7–23 2. Consumer Loyalty Analysis Measures**

Label	Definition
Loyalty Index	<p>Assortment Planning @ Cluster Default Value Loyalty Index. This is a loaded measure and calculation happens outside RCM. 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%).</p> <p>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).</p>
Market Basket Index	<p>This measure is an index measure (with an index to average calculation) indicating the ability of a SKU/Item to drive other customer purchases. 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 the retailer’s Market Basket Analysis. It is also used in IPI score calculations.</p>

### 3. Top Shopper Analysis View

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

**Figure 7–35 3. Top Shopper Analysis View**

	Competitor A	Competitor B	Competitor C	Competitor D	Competitor E	Rest of Market	Spaces Grocery
▼ Coffee	1.00	1.00	0.00	0.00	0.00	0.00	1.00
Ground	1.06	1.25	0.00	0.00	0.00	0.00	1.08
Instant	0.99	0.86	0.00	0.00	0.00	0.00	0.89
Single Serve	1.14	1.23	0.00	0.00	0.00	0.00	1.22
Whole	0.81	0.65	0.00	0.00	0.00	0.00	0.81

Table 7–24 lists the measure available in this view.

**Table 7–24 3. Top Shopper Analysis Measure**

Label	Definition
Top Shopper Index	An index to measure the consumer segment's contribution to the overall retailer's business and their loyalty towards the retailer. It is calculated on the basis of the spend of consumer segments at the retailer using an index-to-average calculation.

## Where is the Consumer Purchasing? Tab

This tab contains two views.

### 1. 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 7–36 1. Retail Channel Share Analysis View**

	▼ Coffee	Ground	Instant	Single Serve	Whole
Grocery	53.0 %	54.0 %	51.0 %	52.0 %	55.0 %
Super-Centers	12.0 %	11.0 %	11.0 %	13.0 %	13.0 %
Warehouse Club	11.0 %	10.0 %	10.0 %	12.0 %	12.0 %
All Other Channels	8.0 %	7.0 %	9.0 %	8.0 %	8.0 %
Mass Merch Without Supers	6.0 %	8.0 %	6.0 %	5.0 %	5.0 %
Dollar Stores	6.0 %	7.0 %	7.0 %	5.0 %	5.0 %
Drug	3.0 %	4.0 %	4.0 %	2.0 %	2.0 %
Convenience/Gas	1.0 %	1.0 %	2.0 %	1.0 %	0.0 %

In Figure 7–36, a majority of the shoppers purchase their coffee at Grocery stores (53%), followed by Super Centers (12%), and then Warehouse Clubs (11%).

**Figure 7–37 1. Retail Channel Share Analysis View**

The screenshot shows the '1. Retail Channel Share Analysis' view. The interface includes a header with 'Location' (Northwest) and 'Measure' (% Dollars). Below the header is a toolbar with various icons. The main data table is as follows:

	Coffee				
	Ground	Instant	Single Serve	Whole	
Grocery	55.0 %	56.0 %	54.0 %	54.0 %	56.0 %
Super-Centers	13.0 %	11.0 %	12.0 %	15.0 %	14.0 %
Warehouse Club	12.0 %	11.0 %	10.0 %	14.0 %	13.0 %
All Other Channels	8.0 %	8.0 %	8.0 %	7.0 %	9.0 %
Mass Merch Without Supers	4.0 %	5.0 %	4.0 %	3.0 %	4.0 %
Dollar Stores	5.0 %	6.0 %	6.0 %	4.0 %	4.0 %
Drug	2.0 %	3.0 %	3.0 %	1.0 %	1.0 %
Convenience/Gas	1.0 %	1.0 %	2.0 %	1.0 %	0.0 %

Figure 7–37 corresponds with the % Dollars spent at each channel on coffee with Grocery stores being 55% of their total dollars spent followed by Super Centers at 13% and so on.

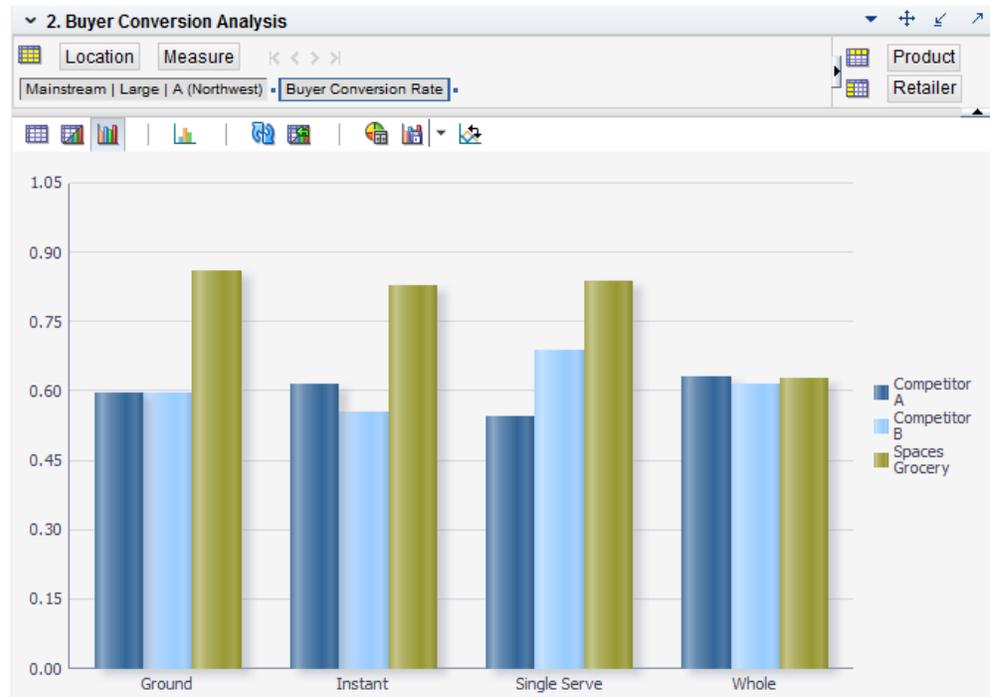
Table 7–25 lists the measures available in this view.

**Table 7–25 1. Retail Channel Share Analysis Measures**

Label	Definition
% Buyers	The percentage of total buyers (shoppers or customers) in a market who purchase from a retail channel. This measure is available at the trading area level and SKU level.
% Dollars	The percentage of buyer’s spend (customer spend or shopper’s spend) in a retail channel. This measure is available at the trading area level and SKU level.

**2. 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 7–38 2. Buyer Conversion Analysis View**

This view enables users to compare the retailer's buyer conversion rates to their competition. For example, in [Figure 7–38](#), the Spaces Grocery retailer leads its competition in conversion rates for Ground, Instant, and Single Serve, but is on par for Whole bean coffee.

[Table 7–26](#) lists the measure available in this view.

**Table 7–26 2. Buyer Conversion Analysis Measure**

Label	Definition
Buyer Conversion Rate	Percentage of shoppers who buy an item or specific set of merchandise (sub-category, category, and so on) out of the total shoppers who shop at the store or the retailer.

## Review Assortment Scorecard Step

This step has the following tabs and views:

- [Category Roles, Strategies, and Tactics Tab:](#)
  1. [Review Roles View](#)
  2. [Review Strategies View](#)
  3. [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.

### 1. Review Roles View

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

**Figure 7–39 1. Review Roles View**

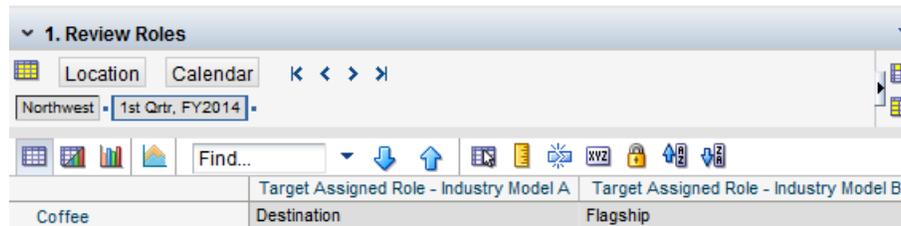


Table 7–27 lists the measures available in this view.

**Table 7–27 1. Review Roles Measures**

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

### 2. Review Strategies View

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

**Figure 7–40 2. Review Strategies View**

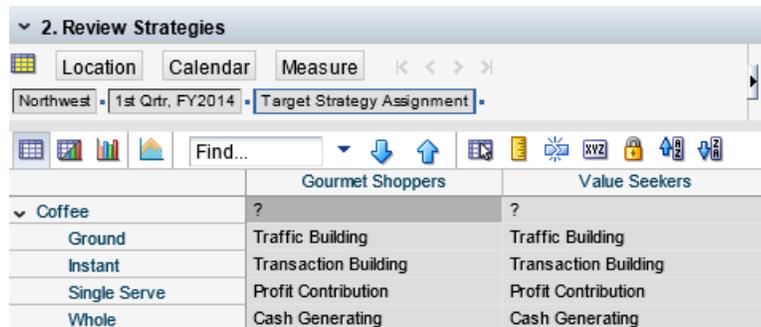


Table 7–28 lists the measure available in this view.

**Table 7–28 2. Review Strategies Measure**

Label	Definition
Target Strategy Assignment	The approved and targeted strategy assignment to a sub-category or category at the trading area level in the category plan.

### 3. Review Tactics View

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

**Figure 7–41 3. Review Tactics View**

		Qtr, 2013	1st Qtr, FY2014
Coffee	Assortment		
	Inventory		
	Pricing		
	Promotion		
	Space		
Ground	Assortment		Maintain
	Inventory		Increase
	Pricing		Market Leader
	Promotion		Coupon Off...
	Space		Decrease
Instant	Assortment		Maintain
	Inventory		Increase
	Pricing		Market Leader
	Promotion		Coupon Off...
	Space		Decrease
Single Serve	Assortment		Maintain
	Inventory		Increase
	Pricing		Market Leader
	Promotion		Coupon Off...
	Space		Decrease
Whole	Assortment		Maintain
	Inventory		Increase

Table 7–29 lists the measure available in this view.

**Table 7–29 3. Review Tactics Measure**

Label	Definition
Target Tactic Assignment	The approved and targeted tactics assignment to a sub-category at the trading area level in the category plan.

## Review Category Scorecard Tab

This tab has two views.

### Scorecard Summary View

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

**Figure 7–42 Scorecard Summary View**

Measure [Label]	Ground	Instant	Single Serve	Whole
WP Assort Sales R	371409.56	863240.78	953183.95	0.00
LY Assort Sales R	48459713.07	10040971.80	18116146.54	21733125.68
CP Assort Sales R	493020.00	499763.81	1028145.00	277096.69
CP Target Sales R	48459713.07	10040971.80	18116146.54	21733125.68
MFP Sales R	44401409.88	9597631.84	16587265.24	19480745.77
WP Assort Sales var to LY R	-0.99	-0.91	-0.95	-1.00
WP Assort Sales var to CP R	-0.25	0.73	-0.07	-1.00
WP Assort Sales var to Tgt R	-0.99	-0.91	-0.95	-1.00
WP Assort Sales var to MFP R	-0.99	-0.91	-0.94	-1.00
CP Assort Sales var to Tgt R	-0.99	-0.95	-0.94	-0.99
CP Assort Sales var to LY R	-0.99	-0.95	-0.94	-0.99
CP Assort Sales var to MFP R	-0.99	-0.95	-0.94	-0.99
WP Assort Gross Profit R	69601.62	152842.38	273812.65	0.00
CP Assort Gross Profit R	0.00	0.00	0.00	0.00
LY Assort Gross Profit R	17523276.44	3040424.17	8788219.68	8889345.16
CP Target Gross Profit R	17698509.21	3070828.41	8876101.87	8978238.61
MFP Gross Profit R	13464973.26	2597084.21	7259338.38	6636965.25
MSO Recommended Gross Profit R	0.00	0.00	0.00	0.00
WP Assort Gross Profit var to LY R	-1.00	-0.95	-0.97	-1.00
WP Assort Gross Profit var to Tgt R	-1.00	-0.95	-0.97	-1.00
WP Assort Gross Profit var to CP R	0.00	0.00	0.00	0.00
WP Assort Gross Profit var to MFP R	-0.99	-0.94	-0.96	-1.00
CP Assort Gross Profit var to LY R	-1.00	-1.00	-1.00	-1.00
CP Assort Gross Profit var to Tgt R	-1.00	-1.00	-1.00	-1.00
CP Assort Gross Profit var to MFP R	-1.00	-1.00	-1.00	-1.00
WP Assort Gross Profit var to MSO R	0.00	0.00	0.00	0.00

Table 7–30 lists the measures available in this view.

**Table 7–30 Scorecard Summary Measures**

Label	Definition
WP Assort Sales R	The sales retail value in the working plan’s assortment for the cluster.
LY Assort Sales R	The sales retail value in the last year's assortment.
CP Assort Sales R	The sales retail value in the current plan assortment for the cluster.
CP Target Sales R	The approved and targeted sales retail value for a category or sub-category at the trading area level in the category plan.
MFP Sales R	Merchandise Financial Plan's sales retail value.
WP Assort Sales var to LY R	The working plan assortment's sales retail value's variance to the same in last year's actuals.
WP Assort Sales var to CP R	The working plan assortment's sales retail value's variance to the same in the current plan.
WP Assort Sales var to Tgt R	The working plan assortment's sales retail value's variance to the same in the target plan (approved category plan).
CP Assort Sales var to Tgt R	The current plan assortment's sales retail values variance to the same in the target plan (approved category plan).
CP Assort Sales var to LY R	The current plan assortment's sales retail value's variance to the same in last year's actuals.
WP Assort Gross Profit R	The gross profit retail value in a working plan’s assortment for the cluster. Gross Profit Retail is the difference between Sales Retail and Cost of Goods Sold.

**Table 7–30 (Cont.) Scorecard Summary Measures**

Label	Definition
CP Assort Gross Profit R	The gross profit retail value in a current plan assortment for the cluster. Gross Profit Retail is the difference between Sales Retail and Cost of Goods Sold.
LY Assort Gross Profit R	The gross profit retail value in last year's assortment for the cluster. Gross Profit Retail is the difference between Sales Retail and Cost of Goods Sold.
CP Target Gross Profit R	The approved and targeted gross profit retail for a category or sub-category at the trading area level in the category plan.
MFP Gross Profit R	Merchandise Financial Plan's gross profit retail value.
MSO Recommended Gross Profit R	Recommended gross profit retail value from the MSO results at sub-category level.
MSO Recommended Space	Recommended space in linear units from the MSO results at sub-category level.
WP Assort Gross Profit var to LY R	The working plan assortment's gross profit value's variance to the same in last year's actuals.
WP Assort Gross Profit var to Tgt R	The working plan assortment's gross profit value's variance to the same in the target plan (approved category plan).
WP Assort Gross Profit var to CP R	The working plan assortment's gross profit value's variance to the same in the current plan.
CP Assort Gross Profit var to LY R	The current plan assortment's gross profit retail value's variance to the same in last year's actuals.
CP Assort Gross Profit var to Tgt R	The current plan assortment's gross profit value's variance to the same in the target plan (approved category plan).

## Review Consumer Segments Tab

This tab has one view.

### Review Consumer Segments View

Use this view to review the customer segments.

**Figure 7–43 Review Consumer Segments View**

	Consumer Seg / Category Sales Contribution %	Consumer Seg / Store Sales Contribution %	Sales by Consumer Seg R	Sales by Consumer Seg U	LY Sales by Consumer Seg R	LY Sales by Consumer Seg U
▼ all [Consumer Segment]	100.0 %	9.2 %	0.0 K	0	2,585.7 K	227,241
Gourmet Shoppers	100.0 %	9.2 %	0.0 K	0	1,292.8 K	113,620
Value Seekers	100.0 %	9.2 %	0.0 K	0	1,292.8 K	113,620

Table 7–31 lists the measures available in this view.

**Table 7–31 Review Consumer Segments Measures**

<b>Label</b>	<b>Definition</b>
Consumer Seg / Category Sales Contribution %	Contribution of a particular consumer segment to a category's retail sales.
Consumer Seg / Store Sales Contribution %	Contribution of a particular consumer segment's contribution to a store's retail sales.
Sales by Consumer Seg R	The sales retail value consumed by a specific consumer segment.
Sales by Consumer Seg U	The sales units consumed by a specific consumer segment.
Consumer Seg Distribution	The percentage of each consumer segment currently shopping the store cluster for the category on an average.
LY Sales by Consumer Seg R	The sales retail contribution in percentage points by a consumer segment to the overall sales retail in last year's assortment.
LY Sales by Consumer Seg U	The sales units contribution in percentage points by a consumer segment to the overall sales units in last year's assortment.

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## Assortment Planning @ Cluster Task

This task enables a retailer to create assortment plans at the cluster level.

The system recommends assortments using two distinct approaches, Item Priority Index (IPI) ranking and Market Coverage. In addition, users can leverage science-generated Customer Decision Trees (CDTs) to analyze their assortment and Demand Transference to understand how demand shifts from one SKU to another due to assortment changes.

This task also facilitates assortment plan optimization through Assortment Improvement and integration with the Assortment and Space Optimization solution.

### Item Priority Index (IPI)

Item Priority Index or IPI is a systematic way of generating an assortment based on ranking and scoring items on various user-specified focus areas such as Performance, Product attributes, Loyalty, and Market Basket. It is recommended that the focus area weights be aligned with the Category's Role and Strategies, for example, a Destination Category with a traffic building strategy should have high emphasis on Performance (Sales U) and Product attributes. The system automatically defaults Focus Area weights based on assigned Category Roles and Strategies. The Focus Area weights can be overridden by the user in this workbook.

### Market Coverage Assortment

The solution also supports an alternate, Market-focused approach to generating an Assortment using the Market Coverage approach. Here, the system picks the best selling Market SKUs based on user-specified Market Coverage targets. Note that Market Sales U and Market Sales R data is required for this approach.

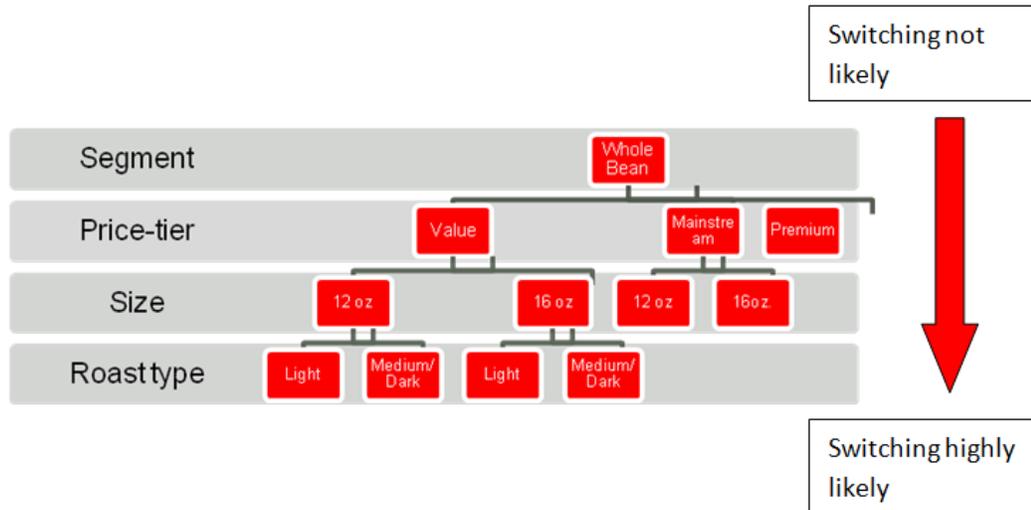
### CDTs and Demand Transference

Once an assortment is planned using one of the described approaches, it is important to understand how these items interact with each other to impact overall Category sales. Demand Transference refers to the shift in demand from one SKU to others due to assortment changes. Dropping an easy squeeze 20 ounce (oz) Heinz ketchup from the assortment might result in a significant portion of the demand shifting to the 14 oz and the 32 oz Heinz ketchup easy squeeze. Some amount of the demand may shift to the 20oz Heinz ketchup - regular. However, if both the 20 oz and 14 oz Heinz ketchup easy squeeze bottles are dropped, then the transferences are very different. Some of the 20oz and 14 oz demand will shift to the 32 oz easy squeeze. The solution provides visibility to such demand shifts and incorporates them into Assortment Plans.

Customer Decision Trees represent the purchasing behavior of a given Customer or Consumer Segment. It represents the most important attributes driving the customer purchase behavior.

Figure 8–1 is an example of CDT:

**Figure 8–1 CDT Example**



As mentioned previously, CDTs can be loaded into the solution from either Oracle Retail Advanced Science Engine (ORASE) or external sources. Once loaded or manually created in the CDT editor and activated in the Category Management Administration workbook, they can be brought into the Assortment Planning workbook. Here, CDTs can be used as an alternate roll-up to view and analyze the assortment along the CDT hierarchy.

## Clusters and Trading Areas

The Assortment Planning process starts by planning Assortments at the Cluster level. Clusters are externally defined and fed in from the Advanced Clustering solution or other external sources. A number of views in Assortment Planning @ Cluster are either at the Cluster level or Trading Area level. In the base GA solution, clusters are within a Trading Area.

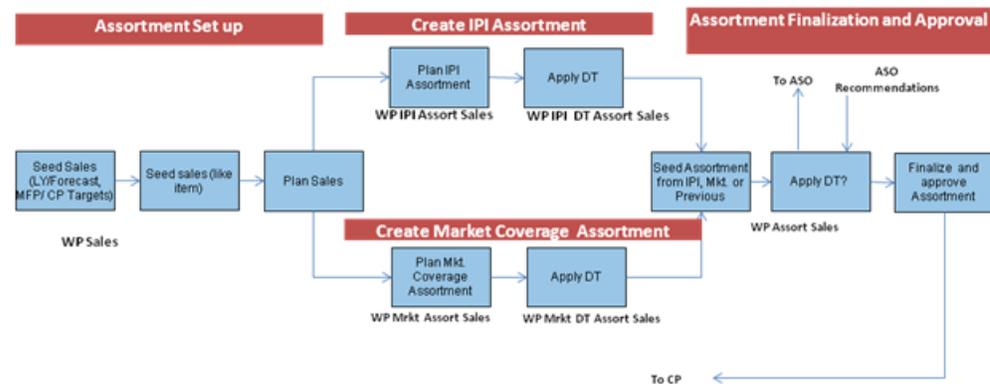
## Task Flow

The Assortment Planning @ Cluster task has the following steps:

- [Assortment Setup Step](#)
- [Manage IPI Assortment Step](#)
- [Manage Market Coverage Assortment Step](#)
- [Finalize Assortment for Space Optimization Step](#)
- [Import and Review ASO Results Step](#)
- [Accept ASO Results and Approve Assortment Step](#)

Figure 8–2 outlines the key steps involved in creating, planning, and approving Assortment Plans at Cluster as well as the key Sales measures involved in each step.

**Figure 8–2 Key Steps in Creating, Planning, and Approving Assortment Plans at Cluster**



## Assortment Planning Analysis Workbook

This task uses the Assortment Planning Analysis workbook. For information on creating the workbook, see [Create the Assortment Planning Analysis Workbook](#) in Chapter 7.

## Assortment Setup Step

The process starts with initialization or seeding of the Assortment Plan from either Last Year, Forecast, or Target data (MFP or CP targets) data.

This step has the following tabs and views:

- **Seed and Review Plan Sales Tab:**
  1. Seed Sales View
  2. Review and Plan Sales View
- **Create Placeholder Items Tab:**
  1. Create Placeholder Items View
- **Like Item Mapping Tab:**
  1. Use Retail Like Item View
  2. Use Market Like Item View
  3. Use Attribute Like Item View
  4. SKU Attribute Maintenance View
- **Review Consumer Segment Status Tab:**
  1. Review Consumer Segments View
- **Set IPI Weights Tab:**
  1. Review Focus Area Weights View
  2. Review Metric Weights View
  3. Review Attribute Weights View
  4. Review Attribute Value Weights View
  5. Review Consumer Segment Weights View
- **Review IPI Scores Tab:**

1. Review Focus Area Score View
  2. Review Consumer Segment Score View
  3. Review IPI Scores View
- Set Assortment Constraints Tab:
    1. Select Eligible and Mandatory Items View
    2. Set IPI Constraints View
    3. Set Market Coverage Constraints View

## Seed and Review Plan Sales Tab

Use the views under this tab to seed the working plan sales and review them against the targets.

### Custom Menu Option

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

At any point in this step, you can run the Seed Sales custom menu option. This populates sales, sales units, profit, and attribute information.

### 1. Seed Sales View

In the Seed Sales view, the user picks the WP Seed Sales as Last Year or Forecast, MFP Target, or CP (Category Plan) Target and executes the Planning action Seed Sales, by clicking the **Seed Sales** custom menu. This populates the WP Sales R and WP Sales U measures. The system computes the various variance measures based on the variance of the WP Sales to Last Year, Forecasts, MFP Target, and CP Target.

It is possible to pick the seed source at the Sub-Category level or Category level.

**Figure 8–3 1. Seed Sales View**

1. Seed Sales		4th Qtr, FY2014
Coffee	WP Seed Sales	
	Fc Sales R	0.06
	Fc Sales U	0.04
	LY Sales R	0.05
	LY Sales U	0.07
	MFP Sales R	111731418.88
	MFP Sales U	10790842.38
	CP Target Sales R	195706788.94
	CP Target Sales U	18726208.36
	WP Sales R	295706788.94
	WP Sales U	28726208.36
	WP Sales var to LY R	1.09
	WP Sales var to LY U	1.11
	WP Sales var to Fc R	2.61
	WP Sales var to Fc U	2.60
	WP Sales var to MFP R	1.65
	WP Sales var to MFP U	1.66
	WP Sales var to Tgt R	0.51
	WP Sales var to Tgt U	0.53

Table 8–1 lists the measures available in this view.

**Table 8–1 1. Seed Sales Measures**

Label	Definition
WP Seed Sales	Contains a drop-down list of methods (includes Last Year Plan, Forecasts, MFP Target, and CP Target) which the sales for a working plan assortment can be seeded. Once the drop-down selection is made, the user needs to run the Seed Sales custom menu option. This measure is available at the sub-category level and above.
Fc Sales R	Forecasted Sales retail value.
Fc Sales U	Forecasted Sales units.
LY Sales R	Last year's assortment's sales retail value.
LY Sales U	Last year's assortment's sales units.
WP Sales R	The working plan sales retail value.
WP Sales U	The working plan sales units.
MFP Sales R	Merchandise Financial Plan's Sales Retail value.
MFP Sales U	Merchandise Financial Plan's Sales Units.
CP Target Sales R	Approved Category Plan's Target Sales Retail value.
CP Target Sales U	Approved Category Plan's Target Sales Units.
WP Sales var to LY R	The working plan's sales retail value's variance to the same in last year's actuals. Similar measures are available for variance with MFP Target and CP Target: WP Sales var to MFP R and WP Sales var to Tgt R respectively.
WP Sales var to LY U	The working plan's sales units' variance to the same in last year's actuals. Similar measures are available for variance with MFP Target and CP Target: WP Sales var to MFP U and WP Sales var to Tgt U respectively.
WP Sales var to Fc R	The working plan's sales retail value's variance to the same in the forecast.
WP Sales var to Fc U	The working plan's sales units' variance to the same in the forecast.

## 2. Review and Plan Sales View

Once the sales have been seeded, it is possible to plan sales that drive the assortment choices. The Planner may choose to plan or override the seeded sales based on business insights and other factors.

**Figure 8–4 2. Review and Plan Sales View**

The screenshot displays a software interface titled "2. Review and Plan Sales". It features a navigation bar with "Location" and "Product" dropdowns, and a "Calendar" icon. Below the navigation is a "Find" search bar. The main area is a data grid with columns representing dates from 1/16/2014 to 1/16/2015. The rows list various metrics for "1234567 - Fulgore Breakfast Roast Non-Fermented Coffee 12 oz Can". The metrics include:

- Fc Sales R, Fc Sales U, LY Sales R, LY Sales U, WP Sales R, WP Sales U, MFP Sales R, MFP Sales U
- WP Sales var to LY R, WP Sales var to LY U, WP Sales var to Fc R, WP Sales var to Fc U
- WP Sales R, WP Sales U, WP Sales var to LY R, WP Sales var to LY U, WP Sales var to Fc R, WP Sales var to Fc U, WP Sales var to MFP R, WP Sales var to MFP U
- WP Gross Profit R, WP Gross Profit U, WP Gross Profit %

The data values are numerical, representing sales and profit figures across the specified time period.

It is possible to plan Sales U, Sales R, AUR, and Gross Profit% or plan these as a variance to LY or Forecast.

Table 8–2 lists the measures available in this view.

**Table 8–2 2. Review and Plan Sales Measures**

<b>Label</b>	<b>Definition</b>
Fc Sales R	Forecasted Sales Retail.
Fc Sales U	Forecasted Sales Units.
LY Sales AUR	Last year's actual average unit retail value of a SKU. It reflects the average selling price of a SKU at a specific product hierarchy level based on last year's actual sales.
LY Sales R	Last year's sales retail value.
LY Sales U	Last year's sales units.
LY Gross Profit R	Last Year's gross profit retail value from the merchandise.
LY Gross Profit %	Last Year's Gross Profit %.
WP Sales var to LY R	The working plan's sales retail value's variance to the same in last year's actuals. Similar measures are available for variance with Forecast, MFP Target, and CP Target: WP Sales var to Fc R, WP Sales var to MFP R, and WP Sales var to Tgt R respectively.
WP Gross Profit R	Working Plan Gross Profit R. Use this measure to plan Gross Profit R. This measure is then used as an input into Assortment rationalization calculations.
WP Sales var to Fc R	The working plan's sales retail value's variance to the same in the forecast retail.
WP Sales var to Fc U	The working plan's sales units' variance to the same in the forecast units. Similar measures are available for variance with Last Year, MFP Target and CP Target: WP Sales var to LY U, WP Sales var to MFP U, and WP Sales var to Tgt U respectively.

Populating the 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*.

## Create Placeholder Items Tab

The next step in the process is to manage new or placeholder items. For new items created dynamically by the user using the Dynamic Product Maintenance (DPM) functionality of RPAS, users have to create a duplicate or cloned version of the new item in the Right Hand Side (RHS) Product hierarchy as well. This is needed to ensure the system generates appropriate Demand Transference effects for the DPM items. The RHS Hierarchy is an RPAS concept used to display products on two axes in the same worksheet. RHS stands for right-hand-side product hierarchy, with the normal product hierarchy being referred to as the Left Hand Side (LHS) product hierarchy.

Care should be taken to ensure the new/placeholder Item name matches exactly with the cloned or RHS item. Note the Create Placeholder Items tab is only relevant for dynamically created placeholder items. For batch feeds of new/DPM items, it is assumed that necessary batch activities initialize the RHS product hierarchy positions.

Use the Create Placeholder Items view to catalog a new SKU/Item using a DPM position. This view is used to create an LHS Product position and simultaneously

create an RHS Product hierarchy for Demand Transference functionality. Both LHS and RHS are available in this view.

### Create Placeholder Items View

Use this view to create placeholder items using DPM and maintain the RHS product hierarchy for them.

**Figure 8–5 Create Placeholder Items View**

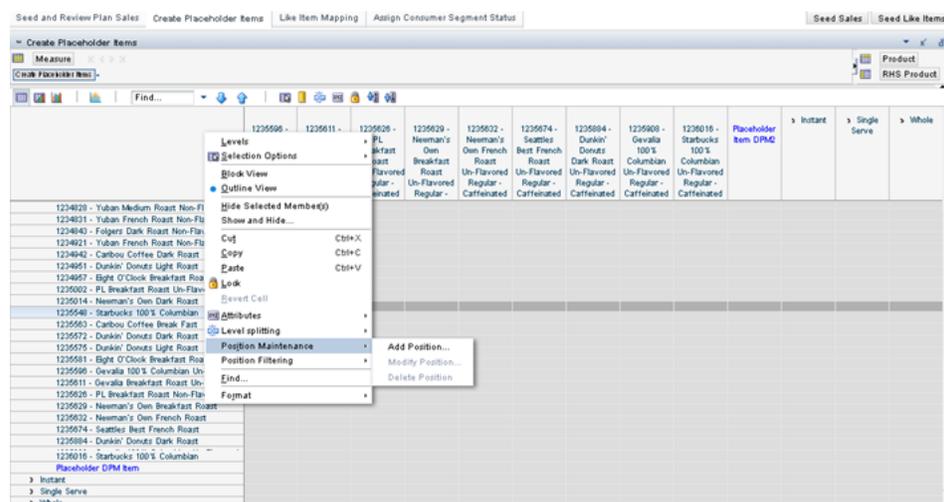


Table 8–3 lists the measure available in this view.

**Table 8–3 Create Placeholder Items Measure**

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

### Like Item Mapping Tab

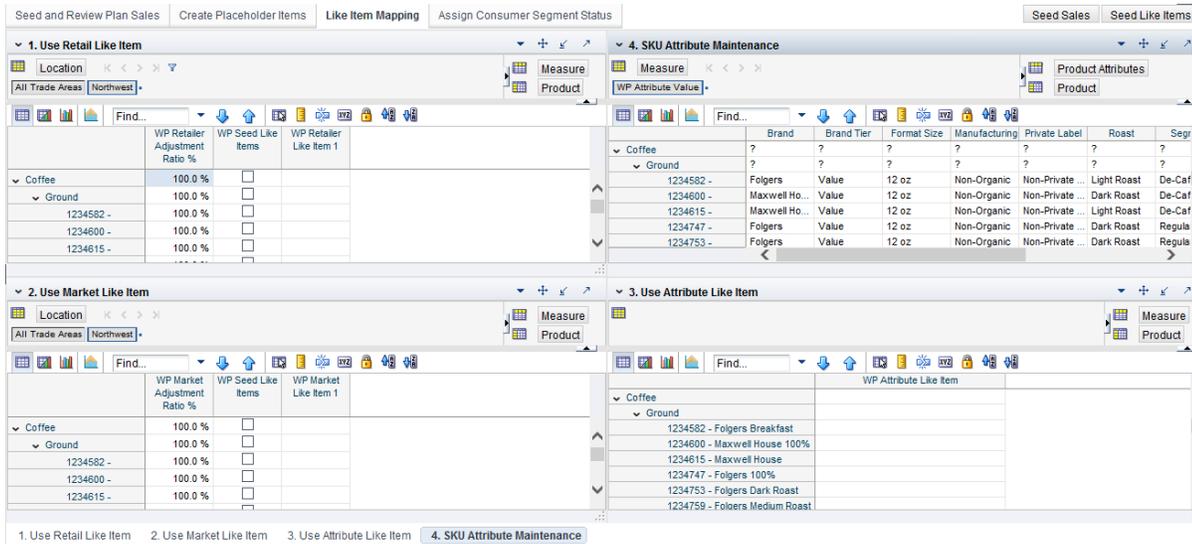
This tab enables users to set up new items to be considered in the assortment.

#### Custom Menu Option

The Seed Like Items custom menu is used to populate the new item's WP Sales U, WP Sales R, WP Gross Profit, WP Gross Profit%, and attribute information from the like items.

The following figure shows the views for this step.

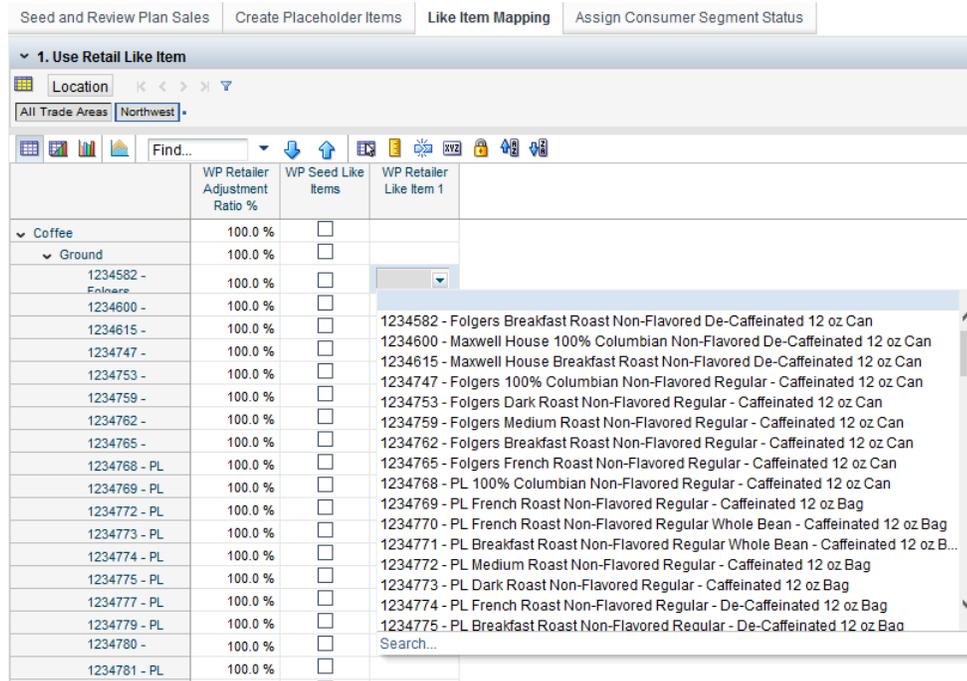
**Figure 8–6 Like Item Mapping Step Initial Views**



### 1. Use Retail Like Item View

This view enables users to seed sales for the new item from a like item carried by the retailer.

**Figure 8–7 1. Use Retail Like Item View**



User can first pick a like item and then run the Seed Like Items planning action. This copies the WP Sales from the Retailer Like Item into the WP Sales for the new item. It is assumed that any necessary seeding of the plan has occurred prior to like item seeding.

**Note:** This is an optional step in the user process if leveraging Demand Transference, as Demand Transference leverages the attributes of the new item to generate a new item forecast that gets seeded into the Assortment Plan.

Table 8–4 lists the measures available in this view.

**Table 8–4 1. Use Retail Like Item Measures**

Label	Definition
WP Retailer Adjustment Ratio %	Provides a facility to adjust a new item's base sales by using a percentage ratio to the sales of the retailer like item.
WP Seed Like Items	A Boolean flag measure, which is required to be checked to seed sales of a new item using like items.
WP Retail Like Item 1 - 3	An item in a retailer's existing assortments used to populate the sales of a new item being added to the assortment using an adjustment ratio.

## 2. Use Market Like Item View

This view enables users to seed sales for the new item from a like item from a market item. Specify an adjustment ratio to ensure sales are scaled to represent the retailer's market share.

**Figure 8–8 2. Use Market Like Item View**

The screenshot displays the '2. Use Market Like Item' view. At the top, there are navigation tabs: 'Seed and Review Plan Sales', 'Create Placeholder Items', 'Like Item Mapping' (selected), and 'Assign Consumer Segment Status'. Below the tabs, the view title is '2. Use Market Like Item'. There is a 'Location' dropdown set to 'Northwest'. A toolbar contains various icons and a 'Find...' search box. The main table has the following columns: 'WP Market Adjustment Ratio %', 'WP Seed Like Items', and 'WP Market Like Item 1'. The table is filtered by 'Coffee' and 'Ground'. A dropdown menu is open for the 'WP Market Like Item 1' column, showing a list of coffee products. At the bottom, there are four tabs: '1. Use Retail Like Item', '2. Use Market Like Item' (selected), '3. Use Attribute Like Item', and '4. SKU Attribute Maintenance'.

	WP Market Adjustment Ratio %	WP Seed Like Items	WP Market Like Item 1
▼ Coffee	100.0 %	<input type="checkbox"/>	
▼ Ground	100.0 %	<input type="checkbox"/>	
1234582 - Folgers	100.0 %	<input type="checkbox"/>	
1234600 -	100.0 %	<input type="checkbox"/>	
1234615 -	100.0 %	<input type="checkbox"/>	1234582 - Folgers Breakfast Roast Non-Flavored De-Caffeinated 12 oz Can
1234747 -	100.0 %	<input type="checkbox"/>	1234600 - Maxwell House 100% Columbian Non-Flavored De-Caffeinated 12 oz Can
1234753 -	100.0 %	<input type="checkbox"/>	1234615 - Maxwell House Breakfast Roast Non-Flavored De-Caffeinated 12 oz Can
1234759 -	100.0 %	<input type="checkbox"/>	1234747 - Folgers 100% Columbian Non-Flavored Regular - Caffeinated 12 oz Can
1234762 -	100.0 %	<input type="checkbox"/>	1234753 - Folgers Dark Roast Non-Flavored Regular - Caffeinated 12 oz Can
1234765 -	100.0 %	<input type="checkbox"/>	1234759 - Folgers Medium Roast Non-Flavored Regular - Caffeinated 12 oz Can
1234768 - PL	100.0 %	<input type="checkbox"/>	1234762 - Folgers Breakfast Roast Non-Flavored Regular - Caffeinated 12 oz Can
1234769 - PL	100.0 %	<input type="checkbox"/>	1234765 - Folgers French Roast Non-Flavored Regular - Caffeinated 12 oz Can
1234772 - PL	100.0 %	<input type="checkbox"/>	1234768 - PL 100% Columbian Non-Flavored Regular - Caffeinated 12 oz Can
1234773 - PL	100.0 %	<input type="checkbox"/>	1234769 - PL French Roast Non-Flavored Regular - Caffeinated 12 oz Bag
1234774 - PL	100.0 %	<input type="checkbox"/>	1234770 - PL French Roast Non-Flavored Regular Whole Bean - Caffeinated 12 oz Bag
1234775 - PL	100.0 %	<input type="checkbox"/>	1234771 - PL Breakfast Roast Non-Flavored Regular Whole Bean - Caffeinated 12 oz B...
1234777 - PL	100.0 %	<input type="checkbox"/>	1234772 - PL Medium Roast Non-Flavored Regular - Caffeinated 12 oz Bag
1234779 - PL	100.0 %	<input type="checkbox"/>	1234773 - PL Dark Roast Non-Flavored Regular - Caffeinated 12 oz Bag
1234780 -	100.0 %	<input type="checkbox"/>	1234774 - PL French Roast Non-Flavored Regular - De-Caffeinated 12 oz Bag
1234781 - PL	100.0 %	<input type="checkbox"/>	1234775 - PL Breakfast Roast Non-Flavored Regular - De-Caffeinated 12 oz Bag

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

**Table 8–5 2. Use Market Like Item Measures**

Label	Definition
WP Market Adjustment Ratio %	The percentage adjustment ratio used to populate base sales of a new item added using market sales of a similar item in the working plan assortment.
WP Seed Like Items	A Boolean flag measure, which is required to be checked to seed sales of a new item using like items.
WP Market Like Item 1 - 3	An item from the market; its market sales are used to populate a new item's sales by using an adjustment percentage ratio.

**3. Use Attribute Like Item View**

This view enables users to seed attributes of the new item from a like item.

**Figure 8–9 3. Use Attribute Like Item View**

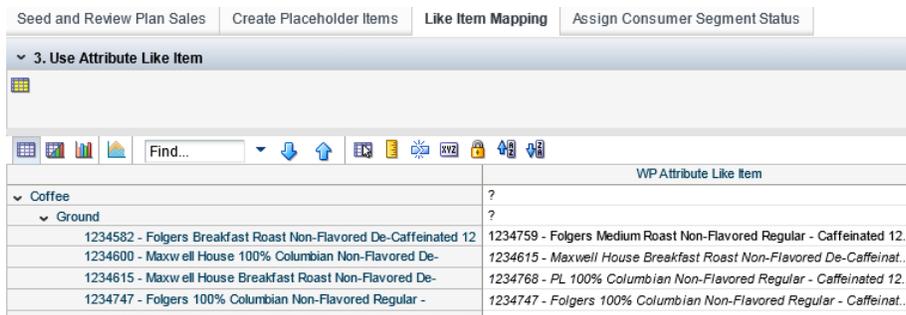


Table 8–6 lists the measure available in this view.

**Table 8–6 3. Use Attribute Like Item Measure**

Label	Definition
WP Attribute Like Item	Attributes of the like item are copied over to the new item.

**4. SKU Attribute Maintenance View**

Users can modify and specify attributes for new items here. Setting up attribute information for new items is an important step in the process as it is used to drive Demand Transference as well as analyze assortment by CDTs. The scope of maintenance includes adding new attribute values and modifying existing mappings.

**Figure 8–10 4. SKU Attribute Maintenance View**

	Brand	Brand Tier	Format Size	Manufacturing	Private Label	Roast	Segment	Sub Category	Sub Segment	Trade Type
☑ Coffee	?	?	?	?	?	?	?	?	?	?
☑ Ground	?	?	?	?	?	?	?	Ground	?	?
1234582 -	Folgers	Value	12 oz	Non-Organic	Non-Private ...	Light Roast	De-Caffeinat...	Ground	Can	Non-Free Tr...
1234600 -	Maxwell Ho...	Value	12 oz	Non-Organic	Non-Private ...	Dark Roast	De-Caffeinat...	Ground	Can	Non-Free Tr...
1234615 -	Maxwell Ho...	Value	12 oz	Non-Organic	Non-Private ...	Light Roast	De-Caffeinat...	Ground	Can	Non-Free Tr...
1234747 -	Folgers	Value	12 oz	Non-Organic	Non-Private ...	Dark Roast	Regular - Ca...	Ground	Can	Non-Free Tr...
1234753 -	Folgers	Value	12 oz	Non-Organic	Non-Private ...	Dark Roast	Regular - Ca...	Ground	Can	Non-Free Tr...
1234759 -	Folgers	Value	12 oz	Non-Organic	Non-Private ...	Original	Regular - Ca...	Ground	Can	Non-Free Tr...
1234762 -	Folgers	Value	12 oz	Non-Organic	Non-Private ...	Light Roast	Regular - Ca...	Ground	Can	Non-Free Tr...
1234765 -	Folgers	Value	12 oz	Non-Organic	Non-Private ...	Dark Roast	Regular - Ca...	Ground	Can	Non-Free Tr...
1234768 - PL	PL	Value	12 oz	Non-Organic	Private Label	Dark Roast	Regular - Ca...	Ground	Can	Non-Free Tr...
1234769 - PL	PL	Value	12 oz	Non-Organic	Private Label	Dark Roast	Regular - Ca...	Ground	Bag	Non-Free Tr...
1234772 - PL	PL	Value	12 oz	Non-Organic	Private Label	Original	Regular - Ca...	Ground	Bag	Non-Free Tr...
1234773 - PL	PL	Value	12 oz	Non-Organic	Private Label	Dark Roast	Regular - Ca...	Ground	Bag	Non-Free Tr...
1234774 - PL	PL	Value	12 oz	Non-Organic	Private Label	Dark Roast	De-Caffeinat...	Ground	Bag	Non-Free Tr...

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

**Table 8–7 4. SKU Attribute Maintenance Measure**

Label	Definition
WP Attribute Value	Defines the attribute value for each attribute name for the SKU. For example, Attribute Name = Brand, Flavor, Size, and so on. Attribute Values for Flavor = Apple, Orange, Grape, Mixed Fruit, and so on.

## Review 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.

## Review Consumer Segments View

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

**Figure 8–11 Review Consumer Segments View**

	Consumer Seg / Category Sales Contribution %	Consumer Seg / Store Sales Contribution %	Sales by Consumer Seg R	Sales by Consumer Seg U	LY Sales by Consumer Seg R	LY Sales by Consumer Seg U
☑ all [Consumer Segment]	100.0 %	9.2 %	0.0 K	0	2,585.7 K	227,241
Gourmet Shoppers	100.0 %	9.2 %	0.0 K	0	1,292.8 K	113,620
Value Seekers	100.0 %	9.2 %	0.0 K	0	1,292.8 K	113,620

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

**Table 8–8 Review Consumer Segments Measures**

Label	Definition
Consumer Seg / Category Sales Contribution %	Contribution of a particular consumer segment to a category's retail sales.
Consumer Seg / Store Sales Contribution %	Contribution of a particular consumer segment's contribution to a store's retail sales.
Sales by Consumer Seg R	The sales retail value consumed by a specific consumer segment.
Sales by Consumer Seg U	The sales units consumed by a specific consumer segment.
LY Sales by Consumer Seg R	The sales retail contribution in percentage points by a consumer segment to the overall sales retail in last year's assortment.
LY Sales by Consumer Seg U	The sales units contribution in percentage points by a consumer segment to the overall sales units in last year's assortment.

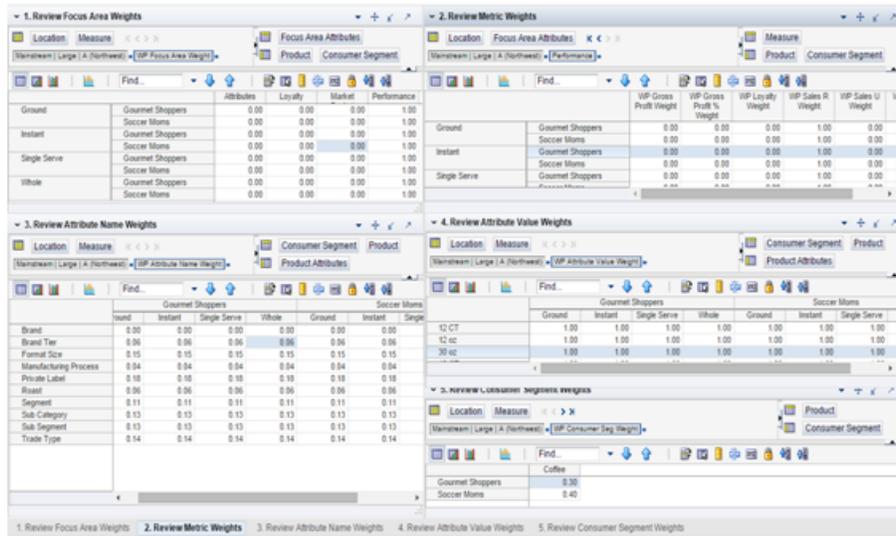
## Set IPI Weights Tab

The following custom menu options are available:

- Seed IPI Weights - This custom menu option is used to seed the preset IPI weights from the IPI Setup step in Category Management Administration task.
- Calc Cluster IPI Score - This custom menu option is used to calculate IPI scores for the items in the WP assortment based on the user-defined weights. Weights should be defined per the business requirements in this tab before running this custom menu option. The IPI scores are presented in the Review IPI Scores tab.

The following figure shows the views for this tab.

**Figure 8–12 Review IPI Criteria Tab Views**



## Focus Area Weights

Focus area weights help the user define what areas are of focus for the category:

- How important is the breadth and variety of product attributes?
- How important is a focus on loyalty for this category?

Performance and Market Basket are other focus areas supported by the solution.

Focus area weights should be chosen to align with broader category role and associated strategies and tactics.

Figure 8–13 shows a best practice Point-of-View (POV) on how category roles, strategies, and tactics can inform focus area weights and metric weights within each focus area.

Figure 8–13 Best Practice for Focus Area Weights

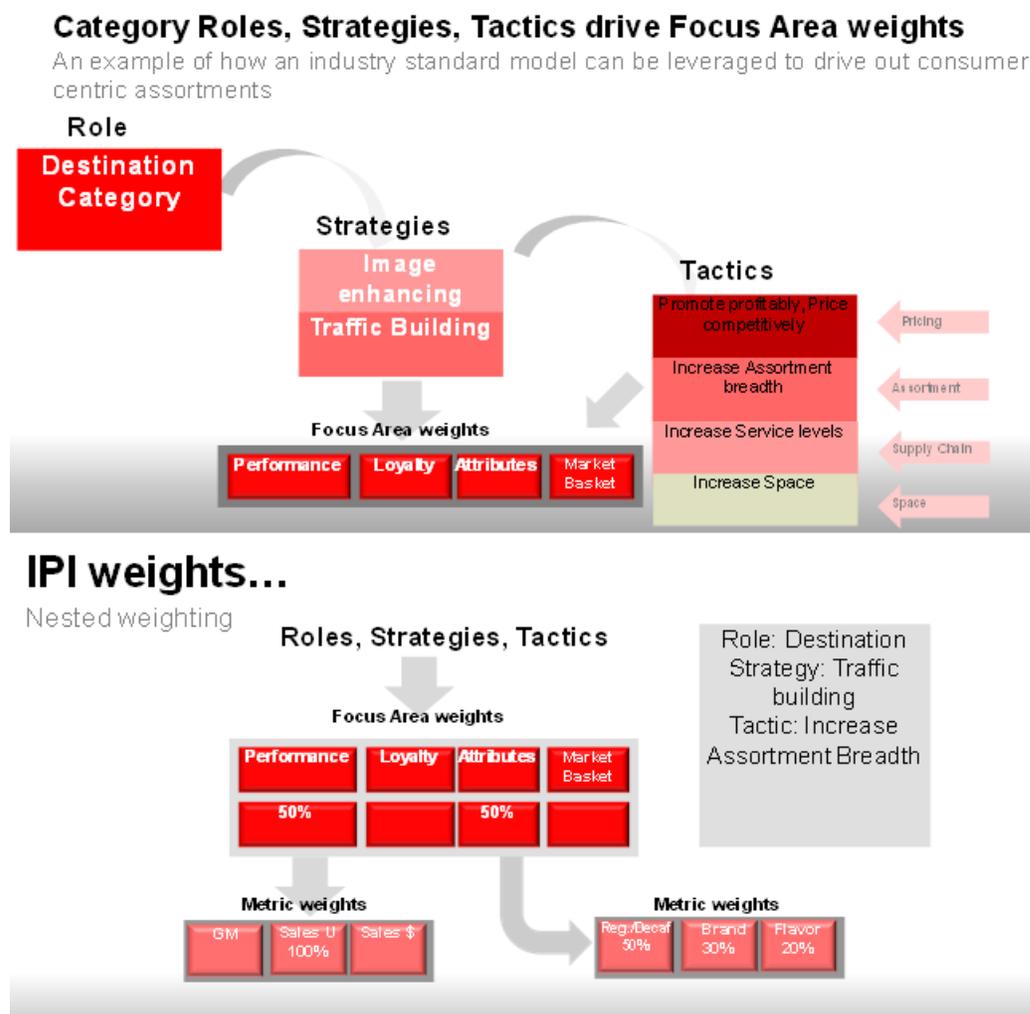


Table 8–9 shows the suggested default focus area weights.

**Table 8–9 Suggested Default Focus Area Weights**

Role	Strategy	Typical Tactics			Suggested Default Focus Area Weights				
					Item Priority Indexes (IPI)				
		Reg. Price	Promotion: Freq./Depth of Price Reduction	Assort.	Perf.	Loyalty	Attributes	Market Basket	Total
Destination	Traffic Building	Low	Freq./Strong	Wide	Medium (Sales U) (50%)	NA	Medium (50%)	NA	100
Routine	Transaction Building	Avg.	Avg./Avg.	Avg.	Medium (50%)	NA	NA	Medium (50%)	100
Routine	Profit Generating	High	Infreq./Weak	Avg.	High (GP) (100%)	NA	NA	NA	100
Routine	Cash Generating	Avg.	Freq./Strong	Avg.	High (Sales \$) (100%)	NA	NA	NA	100
Destination	Excitement Generating	Low	Freq./Strong	Wide	High (Sales U) (100%)	NA	NA	NA	100
Occasional	Image Enhancing	Low	Freq./Strong	Wide	NA	NA	High (100%)	NA	100
Convenience	Turf Defending	Avg.	Freq./Strong	Avg.	Medium (50%)	Medium (50%)	NA	NA	100

Table 8–10 shows the associated default metric weights.

**Table 8–10 Associated Default Metric Weights**

Role	Strategy	Typical Tactics			Suggested Default Metric Weights			
					Perf.	Loyalty	Attributes	Market Basket
		Reg. Price	Promotion: Freq./Depth of Price Reduction	Assort.	Perf.	Loyalty	Attributes	Market Basket
Destination	Traffic Building	Low	Freq./Strong	Wide	Sales U (100%)	NA	Sales U (100%)	NA
Routine	Transaction Building	Avg.	Avg./Avg.	Avg.	Sales U (100%)	NA	NA	Market basket index (50%)
Routine	Profit Generating	High	Infreq./Weak	Avg.	GP (100%)	NA	NA	NA
Routine	Cash Generating	Avg.	Freq./Strong	Avg.	Sales Retail (100%)	NA	NA	NA
Destination	Excitement Generating	Low	Freq./Strong	Wide	Sales U (100%)	NA	NA	NA
Occasional	Image Enhancing	Low	Freq./Strong	Wide	NA	NA	Sales U (100%)	NA
Convenience	Turf Defending	Avg.	Freq./Strong	Avg.	Sales U (100%)	Loyalty Index (100%)	NA	NA

## Custom Menu Options

This tab has the following custom menu options:

- Seed IPI Weights
- Calc Cluster IPI Score

## 1. Review Focus Area Weights View

Focus area weights can be pre-seeded based on the Category strategies from the Seed IPI Weights menu.

**Figure 8–14** 1. Review Focus Area Weights and 2. Review Metric Weights Views

1. Review Focus Area Weights					2. Review Metric Weights						
Attributes	Loyalty	Market Basket	Performance		WP Gross Profit Weight	WP Gross Profit % Weight	WP Loyalty Weight	WP Sales R Weight	WP Sales U Weight	WP Switching Weight	WP Wor Weigh
Ground	50.0 %	0.0 %	0.0 %	50.0 %	0.0 %	0.0 %	0.0 %	0.0 %	100.0 %	0.0 %	0.0 %
Instant	50.0 %	0.0 %	0.0 %	50.0 %	0.0 %	0.0 %	0.0 %	0.0 %	100.0 %	0.0 %	0.0 %
Single Serve	50.0 %	0.0 %	0.0 %	50.0 %	0.0 %	0.0 %	0.0 %	0.0 %	100.0 %	0.0 %	0.0 %
Whole	50.0 %	0.0 %	0.0 %	50.0 %	0.0 %	0.0 %	0.0 %	0.0 %	100.0 %	0.0 %	0.0 %

Table 8–11 lists the measure available in the Review Focus Area Weights view.

---

**Note:** While a number of these weights can be managed at the consumer segment level, it is recommended that a majority of these weights be managed at the All Consumer Segment level, unless specific conditions warrant overriding these at the more granular levels.

---

**Table 8–11** 1. Review Focus Area Weights Measure

Label	Definition
WP Focus Area Weight	The user-defined percentage weight for the focus area used in generating a system-recommended IPI assortment. Focus areas include Attribute, Loyalty, Market Basket, and Performance.

## 2. Review Metric Weights View

For an example of this view, see [Figure 8–14](#).

Table 8–12 lists the measures available in the Review Metric Weights view.

---

**Note:** All metric weights are set per the focus area.

---

**Table 8–12** 2. Review Metric Weights Measures

Label	Definition
WP Gross Profit Weight	The user-defined percentage weight to the WP Gross Profit R metric for the given Focus Area. It is used in generating an IPI score and a system-recommended IPI assortment. It is expected to be set to a non-zero value only for the Performance and/or Attributes focus area, per the default metric weights shown in <a href="#">Table 8–10</a> .

**Table 8–12 (Cont.) 2. Review Metric Weights Measures**

<b>Label</b>	<b>Definition</b>
WP Gross Profit % Weight	The user-defined percentage weight to the WP Gross Profit % metric for the given Focus Area. It is used in generating an IPI score and a system-recommended IPI assortment. It is expected to be set to a non-zero value only for the Performance and/or Attributes focus area, per the default metric weights table shown in <a href="#">Table 8–10</a> .
WP Loyalty Weight	The user-defined percentage weight to loyalty metric (loyalty index) for the given Focus Area. It is used in generating an IPI score and a system-recommended IPI assortment. It is expected to be set to a non-zero value only for the Loyalty focus area. The Loyalty index is an externally sourced measure that represents the importance of an item, relative to other items, to the loyal customers.
WP Sales R Weight	The user-defined percentage weight given to the WP Sales R metric for the given Focus Area. It is used in generating an IPI score and a system-recommended IPI assortment. It is expected to be set to a non-zero value only for the Performance and/or Attributes focus area, per the default metric weights table shown in <a href="#">Table 8–10</a> .
WP Sales U Weight	The user-defined percentage weight given to the WP Sales U metric for the given Focus Area. It is used in generating an IPI score and a system-recommended IPI assortment. It is expected to be set to a non-zero value only for the Performance and/or Attributes focus area, per the default metric weights table shown in <a href="#">Table 8–10</a> .
WP Market Basket Weight	The user-defined percentage weight assigned to the Market Basket index measure for the given focus area. It is expected to be set to a non-zero value only for the Market Basket focus area. The Market Basket index is an externally sourced measure that represents the importance of an item, relative to other items, in terms of its ability to drive baskets.

### 3. Review Attribute Weights View

This view enables users to review and override attribute weights that indicate the relative percentage weight of importance of each attribute in the IPI calculations for the Attribute focus area. Note that these weights are only relevant and used for the Attribute focus area.

These attribute weights are expected to be aligned with CDTs and can vary by consumer segment. By default, these weights are fed in from ORASE and can be reviewed and overridden here.

**Figure 8–15 3. Review Attribute Weights View**

	all [Consumer Segment]			
	Ground	Instant	Single Serve	Whole
Brand	0.70	0.70	0.70	0.70
BrandTier	0.00	0.00	0.00	0.00
FormatSize	0.00	0.00	0.00	0.00
ManufacturingProcess	0.00	0.00	0.00	0.00
Private Label	0.00	0.00	0.00	0.00
Roast	0.00	0.00	0.00	0.00
Segment	0.30	0.30	0.30	0.30
SubCategory	0.00	0.00	0.00	0.00
SubSegment	0.00	0.00	0.00	0.00
TradeType	0.00	0.00	0.00	0.00

Figure 8–15 indicates that there is a 0.7 or 70% emphasis on brand and 0.3 or 30% emphasis on (Product) Segment.

Table 8–13 lists the measure available in this view.

**Table 8–13 3. Review Attribute Weights Measure**

Label	Definition
WP Attribute Name Weight	This is a user-defined numeric weight assigned to the attribute name to be used for IPI score calculations in the context of working plan assortment for the cluster. This helps the user to put emphasis on a particular attribute name in generating a system-recommended IPI assortment.

#### 4. Review Attribute Value Weights View

In addition to specifying the relative importance of attributes (Brand versus Flavor versus Size), it is also possible to specify attribute value weights to over-emphasize or de-emphasize specific attribute values within a cluster. For example, within the high-end store clusters, the Premium brand-tier may need to be given a higher weight to ensure the Premium products get a higher priority than Mainstream and Value oriented brand-tiers.

**Figure 8–16 4. Review Attribute Value Weights View**

4. Review Attribute Value Weights					
Location		Measure			
Mainstream		Mainstream   Large   A (Northwest)			
WP Attribute Value Weight					
all [Consumer Segment]					
Coffee					
	Ground	Instant	Single Serve	Whole	
Brand	1.00	1.00	1.00	1.00	1.00
Caribou Coffee	1.00	1.00	1.00	1.00	1.00
Donut House	1.00	1.00	1.00	1.00	1.00
Dunkin' Donuts	1.00	1.00	1.00	1.00	1.00
Eight O'Clock	1.00	1.00	1.00	1.00	1.00
Folgers	1.00	1.00	1.00	1.00	1.00
Gevalia	1.00	1.00	1.00	1.00	1.00
Maxwell House	1.00	1.00	1.00	1.00	1.00

Table 8–14 lists the measure available in this view.

**Table 8–14 4. Review Attribute Value Weights Measure**

Label	Definition
WP Attribute Value Weight	This is a user-defined numeric weight assigned to the attribute value to be used for IPI score calculations in the context of working plan assortment for the cluster. This helps the user to emphasize a particular attribute value name in generating a system-recommended IPI assortment. The default value of 1 indicates all attribute values are equally important.

**5. Review Consumer Segment Weights View**

Use this view to review and specify consumer segment weights to different clusters. This is essentially where clusters are mapped to consumer segments. These weights impact IPI and Demand Transference calculations.

**Figure 8–17 5. Review Consumer Segment Weights View**

5. Review Consumer Segment Weights				
Measure		Product		
WP Consumer Seg Weight		Coffee		
all [Consumer Segment]				
		Gourmet Shoppers	Soccer Moms	
			Value Seekers	
Mainstream	Mainstream   Large   A	0.0 %	100.0 %	0.0 %
	Mainstream   Medium   B	0.0 %	100.0 %	0.0 %
	Mainstream   Small   C	0.0 %	100.0 %	0.0 %
	Mainstream   Small   D	0.0 %	100.0 %	0.0 %
	Mainstream   Small   E	0.0 %	100.0 %	0.0 %
Premium	Premium   Large   A	100.0 %	0.0 %	0.0 %
	Premium   Medium   B	100.0 %	0.0 %	0.0 %
	Premium   Small   C	100.0 %	0.0 %	0.0 %
	Premium   Small   D	100.0 %	0.0 %	0.0 %
	Premium   Small   E	100.0 %	0.0 %	0.0 %
Value	Value   Large   A	0.0 %	0.0 %	100.0 %
	Value   Medium   B	0.0 %	0.0 %	100.0 %
	Value   Small   C	0.0 %	0.0 %	100.0 %
	Value   Small   E	0.0 %	0.0 %	100.0 %

In the example shown in [Figure 8–17](#), Mainstream store clusters have a 100% focus on Soccer Moms where as Premium store clusters have 100% focus on Gourmet Shoppers. Note that the solution does allow for multiple consumer segments to be aligned to a store cluster. The resulting IPI would be a blend of the individual consumer segment based IPIs in the proportion of the weights specified here. For this example, the IPI values for Premium stores would be a 100% value of the IPI scores for Gourmet shoppers. Details around the IPI calculation logic is covered in the following sections.

Likewise, these weights drive the Demand Transference calculations. It is very important to ensure these weights add up to 100% to ensure that the IPI and Demand Transference results are correct.

[Table 8–15](#) lists the measures available in this view.

**Table 8–15 5. Review Consumer Segment Weights Measures**

Label	Definition
WP Consumer Seg Weight	The user-defined percentage weight to a consumer segment within a cluster. It is used to put emphasis on the target consumer segments while generating a system-recommended IPI assortment, as well as generating Demand Transference. It can be different from WP Consumer Seg Distribution and should represent the retailer's target consumer segment distribution.
WP Consumer Seg Distribution	The distribution of different consumer segments currently representing sales within the cluster.

## Example of IPI Calculations

The following examples illustrate the underlying IPI calculation logic:

- [Example 1: Performance-Based IPI](#)
- [Example 2: Performance and Attribute-Based IPI](#)

### Example 1: Performance-Based IPI

Consider the following focus area weights, with 100% emphasis on performance:

	Performance	Attributes	Loyalty	Market Basket
Focus Area Weights	100%	0%	0%	0%

These are the corresponding metric weights for the Performance Focus Area:

	Gross Profit Weight	Gross Profit % Weight	Sales Unit Weight	Sales R Weight	Loyalty Index Weight	Market Basket Index Weight
Metric Weights	0%	0%	0%	100%	0%	0%

The preceding tables indicate that there is a 100% emphasis on the Performance focus area and, within the Performance focus area, Sales R is the metric used to rank and score items based on their performance.

Consider the following Sales R for a five SKU assortment:

Item	Sales R
Item 1: Starbucks	\$100
Item 2: Starbucks	\$80
Item 3: Starbucks	\$60
Item 4: Folgers	\$40
Item 5: Folgers	\$20

The IPI calculation is essentially an index to average. The average Sales R for the preceding SKU mix is \$60. The Sales R of each SKU is divided by this average of \$60 to compute the index to average or IPI score.

For example, to compute the IPI for Item 1, the Sales R of 100 is divided by the average of the sum of the Sales R for all the items (100, 80, 60, 40, and 20) divided by the number of items (5).

Item	Sales R	IPI
Item 1: Starbucks	\$100	1.67
Item 2: Starbucks	\$80	1.33
Item 3: Starbucks	\$60	1.0
Item 4: Folgers	\$40	0.67
Item 5: Folgers	\$20	0.33

The system uses the IPI scores to rationalize the assortment. The higher the IPI score, the more important the item is to the assortment.

**Example 2: Performance and Attribute-Based IPI**

Consider the following focus area weights, with 50% emphasis on performance and 50% emphasis on attributes:

	Performance	Attributes	Loyalty	Market Basket
Focus Area Weights	50%	50%	0%	0%

These are the corresponding metric weights for the Performance Focus Area:

	Gross Profit Weight	Gross Profit % Weight	Sales Unit Weight	Sales R Weight	Loyalty Index Weight	Market Basket Index Weight
Metric Weights	0%	0%	0%	100%	0%	0%

These are the corresponding metric weights for the Attribute Focus Area:

	Gross Profit Weight	Gross Profit % Weight	Sales Unit Weight	Sales R Weight	Loyalty Index Weight	Market Basket Index Weight
Metric Weights	0%	0%	0%	100%	0%	0%

These are the Attribute name weights:

	<b>Brand</b>	<b>Flavor</b>	<b>Size</b>
<b>Attribute Weights</b>	100%	0%	0%

The preceding tables indicate that there is an equal emphasis on the Performance and Attribute focus areas. Within the Performance focus area, Sales R is the metric used to rank and score items based on their Performance. Likewise, within the Attribute focus area, Sales R is the metric used to rank and score items within each attribute. Brand gets a 100% emphasis within Attribute weights. This means, for the Attribute IPI scoring, items are ranked and scored within each Brand, based on their Sales R.

Consider the following Sales R for a five SKU assortment:

<b>Item</b>	<b>Sales R</b>
Item 1: Starbucks	\$100
Item 2: Starbucks	\$80
Item 3: Starbucks	\$60
Item 4: Folgers	\$40
Item 5: Folgers	\$20

These are the computed Attribute-based IPIs:

The values in the IPI column are calculated by adding 50% of the Performance IPI and 50% of the Attribute IPI.

<b>Item</b>	<b>Sales R</b>	<b>Performance Index to Average (IPI)</b>	<b>Starbucks Index to Average</b>	<b>Folgers Index to Average</b>	<b>Attribute IPI</b>	<b>IPI</b>
Item 1: Starbucks	\$100	1.67	1.25	NA	1.25	1.46
Item 2: Starbucks	\$80	1.33	1.0	NA	1.0	1.17
Item 3: Starbucks	\$60	1.0	0.75	NA	0.75	0.875
Item 4: Folgers	\$40	0.67	NA	1.33	1.33	1.0
Item 5: Folgers	\$20	0.33	NA	0.67	0.67	0.5

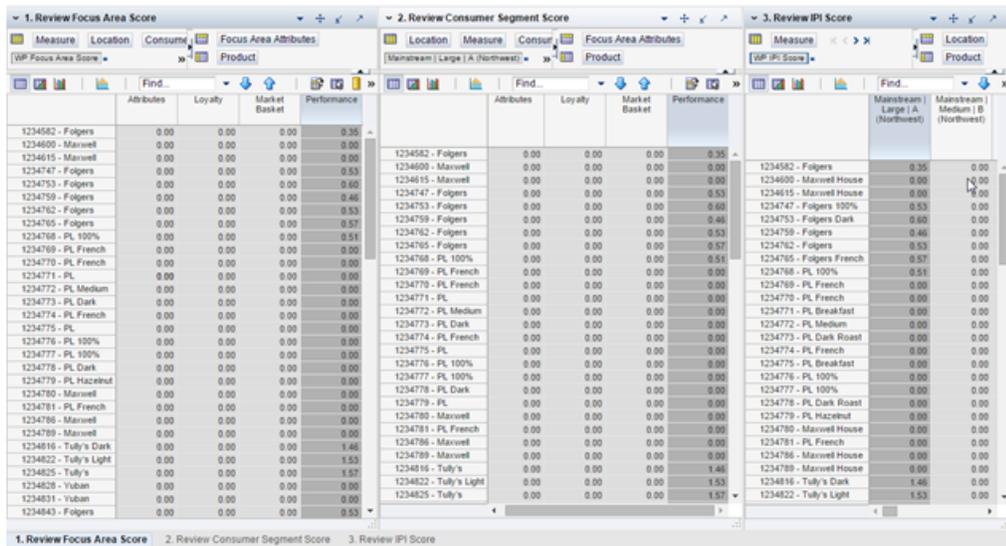
Thus, the resulting IPI score is a blend of top-selling SKUs by Sale R and top-selling SKUs within each Brand (Starbucks and Folgers). The system used IPI scores to rationalize SKUs and recommend an assortment. The higher the IPI score, the more important the SKU is to the assortment.

Using only Performance as a Focus Area would mean Folgers SKUs might get dropped from the assortment. If Brand is important for the consumer segments shopping the stores, the Assortment Planner would want to ensure there are adequate assortment options by each Brand for categories where the Category Roles and Strategies warrant this.

## Review IPI Scores Tab

This tab has three views.

**Figure 8–18 Review IPI Scores Tab View**



**1. Review Focus Area Score View**

Use this view to see the focus area scores. Within each of the focus areas, a score is computed. At this point, you can use the Calc Cluster IPI Score custom menu option to populate values in the next few views.

**Figure 8–19 1. Review Focus Area Score View**

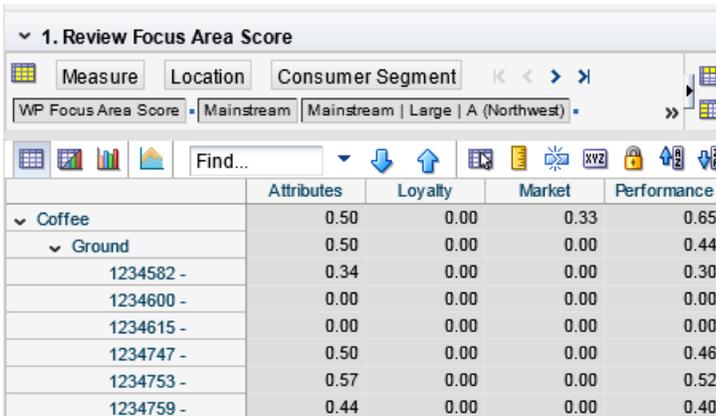


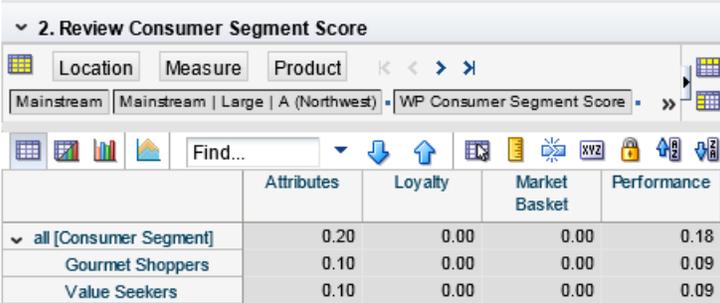
Table 8–16 lists the measure available in this view.

**Table 8–16 1. Review Focus Area Scores Measure**

Label	Definition
WP Focus Area Score	An item's IPI score for a specific focus area in the working plan assortment for the cluster.

**2. 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 8–20 2. Review Consumer Segment Score View**


	Attributes	Loyalty	Market Basket	Performance
▼ all [Consumer Segment]	0.20	0.00	0.00	0.18
Gourmet Shoppers	0.10	0.00	0.00	0.09
Value Seekers	0.10	0.00	0.00	0.09

Table 8–17 lists the measure available in this view.

**Table 8–17 2. Review Consumer Segment Score Measure**

Label	Definition
WP Consumer Segment Score	An item's consumer segment level IPI score towards a working plan assortment for the cluster.

### 3. Review IPI Scores View

Use this view to see the IPI scores.

**Figure 8–21 3. Review IPI Scores View**

	WP IPI Score	WP IPI Rank
1235098 - Caribou Coffee	0.79	38
1235101 - Dunkin' Donuts	0.00	62
1235230 - Starbucks Dark	0.84	35
1235407 - Caribou Coffee	0.91	32
1235548 - Starbucks	1.15	23
1235563 - Caribou Coffee	1.18	21
1235572 - Dunkin' Donuts	1.74	6
1235575 - Dunkin' Donuts	1.74	6
1235581 - Eight O'Clock	0.35	59
1235596 - Gevalia 100%	0.94	29
1235611 - Gevalia	1.15	23
1235626 - PL Breakfast	0.52	48
1235629 - Newman's Own	0.91	32
1235632 - Newman's Own	1.22	19
1235674 - Seattles Best	1.60	11
1235701 - Starbucks	1.18	21
1235716 - Caribou Coffee	1.22	19
1235719 - Caribou Coffee	0.91	32
1235728 - Dunkin' Donuts	0.00	62
1235737 - Eight O'Clock	0.44	54
1235752 - Gevalia 100%	1.05	27
1235785 - Newman's Own	0.84	35
1235794 - Newman's Own	1.25	17
1235806 - Peet's 100%	1.95	1
1235842 - Starbucks	0.94	29
1235845 - Starbucks Light	1.25	17
1235854 - Starbucks Dark	1.11	26
1235884 - Dunkin' Donuts	1.92	2
1235908 - Gevalia 100%	0.94	29
1236016 - Starbucks	0.84	35
1236040 - Dunkin' Donuts	0.00	62

Table 8–18 lists the measures available in this view.

**Table 8–18 3. Review IPI Scores Measures**

Label	Definition
WP IPI Score	An item's final IPI score in working plan assortment for the cluster.
WP IPI Rank	An ordinal (sequential) rank assigned to an item in the working plan assortment for the cluster on the basis of its respective IPI score.

## Set Assortment Constraints Tab

Use the views under this tab to set the constraints for system-recommended assortments through the IPI and Market Coverage methods.

This tab has the following views:

1. [Select Eligible and Mandatory Items View](#)
2. [Set IPI Constraints View](#)
3. [Set Market Coverage Constraints View](#)

## 1. Select Eligible and Mandatory Items View

Use this view to set the assortment eligibility for items and select the mandatory items for assortment generation.

The Assortment Eligibility flag measure is used to define the set of items which should participate in the assortment generation process. Effectively, it is used to select the items that are eligible to be part of the assortment.

**Figure 8–22 1. Select Eligible and Mandatory Items View**

	LY Retailer Sales @ Cluster R	LY Retailer Sales Rank	LY Market Sales @ Cluster R	LY Market Sales Rank	WP Mandatory	WP Assortment Eligibility	Assortment Eligibility Error
1234562 - Folgers Breakfast Roast Non-Flavored De-Caffeinated 12 oz Can	76997.19	57	171687.81	76	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
1234569 - Maxwell House 100% Columbian Non-Flavored De-Caffeinated 12 oz Can	0.00	62	242261.95	57	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
1234615 - Maxwell House Breakfast Roast Non-Flavored De-Caffeinated 12 oz Can	0.00	62	265764.68	46	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
1234747 - Folgers 100% Columbian Non-Flavored Regular - Caffeinated 12 oz Can	114160.50	43	257546.09	50	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
1234753 - Folgers Dark Roast Non-Flavored Regular - Caffeinated 12 oz Can	129361.84	40	291865.44	44	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
1234759 - Folgers Medium Roast Non-Flavored Regular - Caffeinated 12 oz Can	98939.25	51	223296.95	60	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
1234762 - Folgers Breakfast Roast Non-Flavored Regular - Caffeinated 12 oz Can	114160.50	43	257546.09	49	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
1234765 - Folgers French Roast Non-Flavored Regular - Caffeinated 12 oz Can	121771.22	42	274715.87	48	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
1234768 - PL 100% Columbian Non-Flavored Regular - Caffeinated 12 oz Can	199277.16	49	246529.26	55	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Table 8–19 lists the measures available in this view.

**Table 8–19 1. Select Eligible and Mandatory Items View Measures**

Label	Definition
LY Market Sales @ Cluster R	Last year's market sales for the cluster. It is typically sourced from third parties providing syndicated data on a quarterly basis.
LY Market Sales Rank	An ordinal rank assigned on the basis of the LY Market Sales R of an item within a product category.
WP Mandatory	A Boolean flag measure used to mark an item as mandatory in a working plan assortment.
WP Assortment Eligibility	A Boolean flag measure indicating whether an item is eligible to be part of the assortment for the retailer to stock and sell.
Assortment Eligibility Error	This read-only measure is used to present the error in case mandatory items are selected without checking their assortment eligibility flag.

## 2. Set IPI Constraints View

Use this view to define the constraints for IPI Assortment generation. Following are the four available constraint types:

- **SKU Count:** Use this option to create an IPI assortment by defining the assortment range in the form of the WP Core SKU Count and WP Core + Optn SKU Count measures in line with the available space for the category.
- **IPI Thresholds:** Use this option to create an IPI assortment by setting the IPI Cutoff Index for Core and Optional Items.
- **MFP Target:** Use this option to create an IPI assortment using MFP targets.
- **CP Target:** Use this option to create an IPI assortment using CP targets.

Check the WP Create IPI Assortment flag measure, set the required assortment constraints, and run the Create IPI Assortment @Cluster custom menu.

The IPI Apply DT flag measure can be checked to dynamically calculate demand transference affected sales for the assortment being generated.

**Figure 8–23 2. Set IPI Constraints View**

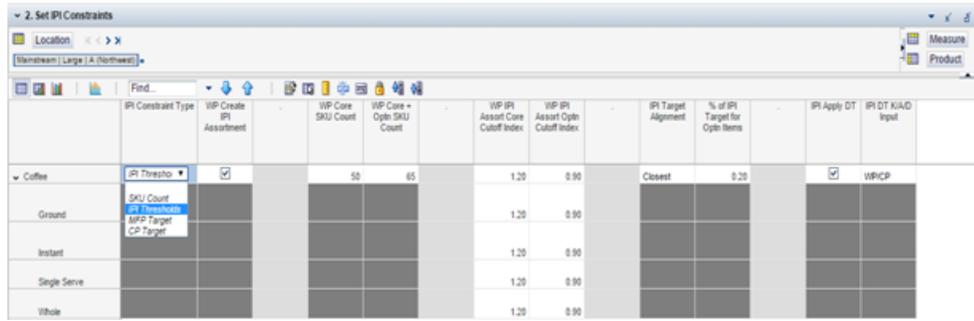


Table 8–20 lists the measures available in this view.

**Table 8–20 2. Set IPI Constraints Measures**

Label	Description
IPI Constraint Type	A drop-down measure used to select the constraint type to be used to generate the IPI assortment at the cluster level. The drop-down options are SKU Count, IPI Thresholds, MFP Target, and CP Target.
WP Create IPI Assortment	A Boolean measure which is required to be selected to generate a system-recommended IPI assortment towards a working plan assortment for the cluster.
WP Core SKU Count	The number of core items desired in the IPI Assortment for the cluster when using the SKU Count constraint type.
WP Core + Optn SKU Count	The sum of the core and optional items desired in the IPI assortment for the cluster when using the SKU Count constraint type.
WP IPI Assort Core Cutoff Index	The IPI score for an eligible item to be classified as a core item when generating an IPI assortment at the cluster level using the IPI Thresholds constraint type.
WP IPI Assort Optn Cutoff Index	The IPI score for an eligible item to be classified as an optional item when generating an IPI assortment at the cluster level using the IPI Thresholds constraint type.
IPI Target Alignment	A drop-down measure used to set the alignment to the target plan measure when using the constraint types MFP Target and CP Target at the cluster level. The options in the drop-down are Over, Under, and Closest.
% of IPI Target for Optn Items	A percentage value defined to set the total sales retail value for the optional items over the assortment plan's sales retail value, when using the constraint types MFP Target and CP Target to derive the IPI assortment at the cluster level. This measure facilitates creation of optional items when using the target-constrained methods of IPI assortment generation.
IPI Apply DT	A Boolean flag measure required to be checked if demand transference needs to be applied dynamically to calculate the assortment plan sales retail value while generating the IPI assortment at the cluster level. Demand Transference is applied simultaneously at every step, when items are added, one at a time, to reach the targeted assortment plan.
IPI DT K/A/D Input	A drop-down measure used to provide a reference assortment input for demand transference calculations in the IPI assortment generation at the cluster level. The drop-down options are WP/LY (last year assortment) and WP/CP (current plan assortment).

### 3. Set Market Coverage Constraints View

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

**Figure 8–24 3. Set Market Coverage Constraints View**

	WP Max Core SKU Count	WP Max Core + Optn SKU Count	WP Min Core Coverage %	WP Min Core + Optn Coverage %	WP Min Core SKU Count	WP Min Core + Optn SKU Count	WP Max Core SKU Count @ Cat	WP Max Core + Optn SKU Count @ Cat	WP Min Core Coverage % @ Cat	WP Min Core + Optn Coverage % @ Cat	WP Min Core SKU Count @ Cat	WP Min Core + Optn SKU Count @ Cat	Create MC Assort
▼ Coffee	20	30	80.00	90.00	0	0	60	70	80.00	90.00	0	0	<input type="checkbox"/>
Ground	20	30	80.00	90.00	0	0							
Instant	20	30	60.00	85.00	0	0							
Single Serve	20	30	50.00	60.00	0	0							
Whole	20	30	80.00	90.00	0	0							

Table 8–21 lists the measures available in this view.

**Table 8–21 3. Set Market Coverage Constraints Measures**

Label	Definition
WP Max Core SKU Count	The maximum number of core items in a working plan assortment.
WP Max Core + Optn SKU Count	The maximum number of core plus optional items in a working plan assortment.
WP Min Core Coverage %	The minimum market coverage (Market Sales Retail) of the core items in the working plan assortment. For example, specifying a Min. core Coverage% of 80% means all SKUs that contribute to the top 80% of the Market Sales Retail will be flagged as core.
WP Min Core + Optn Coverage %	The minimum market coverage (Market Sales Retail) of the core plus the optional items in the working plan assortment. For example, specifying a Min. Core + Optional Coverage% of 90% with a Min. Core Coverage% of 80% means all SKUs that contribute to the top 80% of the Market Sales Retail will be flagged as core and all SKUs contributing between 80 and 90% of Market Sales Retail will be flagged as optional.
WP Min Core SKU Count	The minimum number of core SKUs in a working plan assortment. If specified, this serves as the lower bound on the number of core SKUs recommended by the system.
WP Min Core + Optn SKU Count	The minimum number of core plus optional SKUs in a working plan assortment. If specified, this serves as the lower bound on the number of core plus optional SKUs recommended by the system.
WP Max Core SKU Count @ Cat	The maximum number of core SKUs for the category. If specified, this serves as the upper bound on the number of core SKUs recommended by the system for the category.
WP Max Core + Optn SKU Count @ Cat	The maximum number of core plus optional SKUs for the category. If specified, this serves as the upper bound on the number of core plus optional SKUs recommended for the category.

**Table 8–21 (Cont.) 3. Set Market Coverage Constraints Measures**

<b>Label</b>	<b>Definition</b>
WP Min Core Coverage % @ Cat	The minimum market coverage (Market Sales Retail) of the core items in the working plan assortment for the category.
WP Min Core + Optn Coverage % @ Cat	The minimum market coverage (Market Sales Retail) of the core plus optional items in the working plan assortment for the category.
WP Min Core SKU Count @ Cat	The minimum number of core SKUs in a working plan assortment. If specified, this serves as the lower bound on the number of core SKUs recommended by the system for the category.
WP Min Core + Optn SKU Count @ Cat	The minimum number of core plus optional SKUs in a working plan assortment. If specified, this serves as the lower bound on number of core plus optional SKUs recommended by the system for the category.
Create Market Coverage Assortment	Creates an assortment matching as many constraints as possible.

## Manage IPI Assortment Step

Use this step to review, revise, and manage an IPI Assortment.

This step has the following tabs and views:

- [Review IPI Assortment Recommendations Tab:](#)
  - 1a. [Review IPI Assortment Recommendation View](#)
  - 1b. [Review IPI DT Details View](#)
  2. [IPI Assortment Dashboard View](#)
- [Improve IPI Assortment Tab:](#)
  1. [Set Parameters for IPI Assortment Improvement View](#)
  2. [Review Improved IPI Assortment View](#)
- [IPI Ordered Incremental Curve Tab:](#)
  - [View IPI Ordered Incremental Curve View](#)

## Custom Menu Options

The following custom menu options are available:

- [Apply DT to IPI](#)

This custom menu is used to apply demand transference to an assortment, after making changes to the assortment mix, to see the shift in sales between items.
- [Apply IPI Assortment Improvement](#)

This custom menu is used to apply assortment improvement to IPI assortments.
- [Accept IPI Assortment Improvement](#)

This custom menu is used to accept assortment improvement recommendations for an IPI assortment. On acceptance, the assortment improvement recommendations are copied to the IPI assortment (IPI DT Assort type) measures.
- [Calc IPI Incremental Curve](#)

This custom menu is used to generate an IPI-ordered incremental curve for an IPI assortment.

## Review IPI Assortment Recommendations Tab

This tab has three views.

### 1a. 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 the 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 such as an LY (Last Year) assortment or CP (Current Plan) Assortment. Such a reference assortment is used as the base assortment for assortment changes in the form of Keep, Add, and Drop.

**Figure 8–25 1a. Review IPI Assortment Recommendation View**

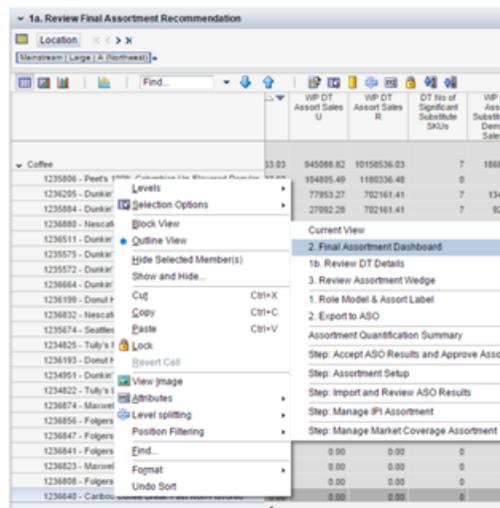


Table 8–22 lists the measures available in this view.

**Table 8–22 1a. Review IPI Assortment Recommendation View Measures**

Label	Definition
WP IPI Score	An item's final IPI score in working plan assortment for the cluster.

**Table 8–22 (Cont.) 1a. Review IPI Assortment Recommendation View Measures**

<b>Label</b>	<b>Definition</b>
WP IPI Rank	An ordinal (sequential) rank assigned to an item in the working plan assortment for the cluster on the basis of its respective IPI score.
WP Mandatory	A Boolean flag measure used to mark an item as mandatory in a working plan assortment for the cluster.
IPI Core Recommended	A system-calculated measure, this measure is set to True if the item is designated as a core item for the IPI-based assortment.
IPI Optn Recommended	A system-calculated measure, this measure is set to True if the item is designated as an optional item for the IPI-based assortment.
WP IPI Assort Core	An editable Boolean measure indicating whether an item is a core item in the IPI Assortment. It can be used to change the core items in an IPI assortment.
WP IPI Assort Optn	An editable Boolean measure indicating whether an item is an optional item in the IPI Assortment. It can be used to modify optional items in IPI assortment.
IPI Core/Optn Error	An error flag measure used to highlight a scenario wherein both the core and optional item Boolean flag measures are checked for the same item in a system-recommended IPI assortment.
WP IPI Assort Core Count	The number of core items per the IPI calculations (in a system-recommended IPI assortment) in the working plan's assortment for the cluster.
WP IPI Assort Optn Count	The number of optional items per the IPI calculations (in an IPI system-recommended assortment) in the working plan's assortment for the cluster.
LY Assort Core	A Boolean flag measure indicating whether an item is a core item in last year's assortment for the cluster.
LY Assort Optn	A Boolean flag measure indicating whether an item is an optional item in last year's assortment for the cluster.
LY Assort Core Count	The number of core items in last year's assortment.
LY Assort Optn Count	The number of optional items in a last year's assortment.
CP Assort Core	A Boolean flag measure indicating whether an item is a core item in the current plan's assortment for the cluster.
CP Assort Optn	A Boolean flag measure indicating whether an item is an optional item in the current plan assortment for the cluster.
CP Assort Core Count	The number of core items in a current plan's assortment for the cluster.
CP Assort Optn Count	The number of optional items in a current plan assortment for the cluster.
WP IPI Assort Compare to LY	Keep, Add, or Drop decision on comparing an IPI-based assortment with an LY assortment at the cluster level.
WP IPI Assort Compare to CP	Keep, Add, or Drop decision on comparing an IPI-based assortment with a Current Plan assortment at the cluster level.



Figure 8-27 1a. Review IPI Assortment Recommendation Example 1

	WP IPI Score	WP IPI Rank	WP Mandatory for Assortment	IPI Core Recommendation	IPI Optn Recommendation	WP IPI Core	WP IPI Optn	WP IPI Core Count	WP IPI Optn Count	LY Assort Core	LY Assort Optn	LY Assort Core Count	LY Assort Optn Count	CP Assort Core	CP Assort Optn	CP Assort Core Count
Coffee	1.00	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	48	9	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	13	28	<input checked="" type="checkbox"/>	<input type="checkbox"/>	4
1236880 - Nescafe	2.31	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
1236205 - Dunkin'	2.16	2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
1236511 - Dunkin'	2.07	3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
1236832 - Nescafe	2.06	4	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
1235575 - Dunkin'	1.77	5	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
1235674 - Seattles	1.77	6	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
1236199 - Donut	1.69	7	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
1235806 - Peef's	1.58	8	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
1236193 - Donut	1.52	9	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
1234825 - Tully's	1.46	10	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
1234822 - Tully's	1.43	11	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
1235845 - Starbucks	1.38	12	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
1235716 - Caribou	1.36	13	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
1234816 - Tully's	1.36	14	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
1235701 - Starbucks	1.30	15	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
1235854 - Starbucks	1.23	16	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
1234753 - Folgers	1.17	17	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
1235794 - Newman's	1.13	18	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
1235611 - Gevalia	1.12	19	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
1234765 - Folgers	1.10	20	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
1235632 - Newman's	1.10	21	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
1236856 - Folgers	1.04	22	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

The next set of measures displays the Keep/Add/Drop recommendations compared to CP and LY based on the IPI core designation. Users also have visibility to the Assortment Plan metrics such as the Planned Assortment Sales Units and Retail WP IPI Assort Sales U and WP IPI Assort Sales R.

Figure 8-28 1a. Review IPI Assortment Recommendation Example 2

	IPI Optn Count	LY Assort Core	LY Assort Optn	LY Assort Core Count	LY Assort Optn Count	CP Assort Core	CP Assort Optn	CP Assort Core Count	CP Assort Optn Count	WP IPI Assort Compare to LY	WP IPI Assort Compare to CP	IPI DT K/A/D Input	WP IPI Assort Sales U	WP IPI Assort Sales R
Coffee	9	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	13	28	<input checked="" type="checkbox"/>	<input type="checkbox"/>	43	0	?	?		2,999,804	30,251.1 K
1236880 - Nescafe	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	Keep	Keep		159,872	1,098.4 K
1236205 - Dunkin'	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	Keep	Keep		128,420	1,176.9 K
1236511 - Dunkin'	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	Keep	Keep		121,415	1,112.7 K
1236832 - Nescafe	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	Keep	Keep		144,790	994.8 K
1235575 - Dunkin'	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	Keep	Keep		103,759	1,069.9 K
1235674 - Seattles	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	Keep	Keep		118,906	953.3 K
1236199 - Donut	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	Keep	Keep		110,808	1,015.5 K
1235806 - Peef's	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	Keep	Keep		101,285	1,160.5 K
1236193 - Donut	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	Add	Keep		99,501	911.9 K
1234825 - Tully's	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	Keep	Keep		90,443	932.6 K
1234822 - Tully's	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	Add	Keep		88,433	911.9 K
1235845 - Starbucks	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	Add	Keep		68,996	790.5 K
1235716 - Caribou	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	Add	Keep		64,864	743.2 K
1234816 - Tully's	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	Add	Keep		84,414	870.4 K
1235701 - Starbucks	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	Add	Keep		65,154	746.5 K
1235854 - Starbucks	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	Add	Keep		61,321	702.6 K
1234753 - Folgers	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	Add	Keep		55,076	378.4 K
1235794 - Newman's	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	Add	Keep		59,187	746.1 K
1235611 - Gevalia	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	Add	Keep		54,255	683.9 K
1234765 - Folgers	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	Add	Keep		51,836	356.1 K
1235632 - Newman's	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	Add	Keep		57,543	725.3 K
1236856 - Folgers	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	Add	Keep		48,597	333.9 K

The next step in the process is Demand Transference (DT). So far, the assortment has been planned with each SKU in isolation, that is, without an understanding of how newly added or dropped SKUs impact the demand for the other SKUs in the assortment.

Assortment changes can be made to the system-recommended assortment and demand transference can be applied to calculate the demand transference affected sales for the assortment. Assortment changes consist of adding new items as core

items to the assortment or dropping the existing core items by un-checking their core flags.

Demand Transference is applied through the Apply DT to IPI custom menu.

The next set of measures allows users to review the forecasted impact of demand transference on their planned assortment, to help make informed assortment decisions. For example, a high selling SKU may also be a highly substitutable SKU.

You can apply DT on the planned assortment by first selecting IPI DT K/A/D input to specify to the system the baseline assortment, CP or LY to use for Demand Transference calculations.

Next run the Menu option, Apply DT to IPI. This should populate or update all DT measures, based on the planned assortment.

**Figure 8–29 1a. Review IPI Assortment Recommendation Example 3**

WP IPI DT K/A/D Input	WP IPI Assort Sales U	WP IPI Assort Sales R	WP IPI DT Assort Sales U	WP IPI DT Assort Sales R	IPI DT No of Significant Substitute SKUs	WP IPI DT Substitutable Demand Sales U	WP IPI DT Substitutable Demand Sales R	WP IPI Demand Transferred %	WP IPI DT Lost Demand Sales U	WP IPI DT Lost Demand Sales R	WP IPI Gross Profit %	WP IPI Gross Profit R	WP IPI DT Gross Profit %	WP IPI DT Gross Profit R
Coffee	2,999,804	30,251.1 K	2,924,130	29,616.0 K	27	1,575,425	15,848.2 K	53.9 %	1,424,300	14,403.0 K	30.7 %	9,300.3 K	30.7 %	9,090.0 K
1236080 - Nescafe	159,872	1,098.4 K	151,648	1,041.9 K	8	97,514	670.0 K	64.3 %	62,357	428.4 K	17.6 %	193.8 K	17.6 %	183.8 K
1236205 - Dunkin'	128,420	1,176.9 K	121,904	1,117.2 K	4	85,445	783.0 K	70.1 %	42,975	393.8 K	15.6 %	183.5 K	15.6 %	174.2 K
1236511 - Dunkin'	121,415	1,112.7 K	118,342	1,084.5 K	7	51,174	489.0 K	43.2 %	70,241	643.7 K	18.5 %	183.5 K	18.5 %	178.8 K
1236632 - Nescafe	144,790	994.0 K	134,629	925.0 K	11	53,110	364.9 K	39.5 %	91,672	629.8 K	19.5 %	193.0 K	19.5 %	180.2 K
1235575 - Dunkin'	103,759	1,069.9 K	105,826	1,091.3 K	24	47,165	496.3 K	44.8 %	56,594	583.6 K	17.1 %	183.3 K	17.1 %	187.1 K
1235674 - Starbucks	118,906	853.3 K	116,459	833.7 K	26	37,048	297.0 K	31.8 %	81,856	656.3 K	28.7 %	187.3 K	28.7 %	193.2 K
1236199 - Donut	110,808	1,015.5 K	104,208	955.0 K	5	52,372	480.0 K	50.3 %	58,436	535.5 K	29.5 %	299.4 K	29.5 %	281.5 K
1235806 - Peet's	101,285	1,160.9 K	100,537	1,152.0 K	15	58,098	465.3 K	57.7 %	43,228	485.3 K	24.9 %	288.9 K	24.9 %	286.8 K
1236193 - Donut	99,501	911.9 K	94,618	867.1 K	4	66,984	614.0 K	70.8 %	32,508	297.9 K	32.8 %	298.4 K	32.8 %	284.7 K
1234825 - Tully's	90,443	932.8 K	89,005	918.6 K	14	52,165	537.9 K	58.6 %	38,278	384.7 K	26.8 %	248.8 K	26.8 %	246.0 K
1234822 - Tully's	88,433	911.9 K	87,430	901.5 K	12	58,675	605.0 K	67.1 %	29,758	308.8 K	27.4 %	249.8 K	27.4 %	246.9 K
1235545 - Starbucks	68,996	790.5 K	68,556	785.5 K	14	41,349	473.8 K	60.3 %	27,637	316.7 K	25.7 %	203.3 K	25.7 %	202.0 K
1235718 - Caribou	64,884	743.2 K	64,457	738.8 K	14	38,458	440.7 K	59.7 %	26,406	302.6 K	17.3 %	128.7 K	17.3 %	127.9 K
1234816 - Tully's	64,414	870.4 K	63,299	858.9 K	15	52,221	538.5 K	62.7 %	32,192	331.9 K	28.7 %	249.0 K	28.7 %	246.5 K
1235701 - Starbucks	65,154	746.5 K	64,899	741.3 K	14	38,450	440.6 K	59.4 %	26,704	308.0 K	27.2 %	203.3 K	27.2 %	201.9 K
1235854 - Starbucks	61,321	702.6 K	60,919	698.0 K	14	39,569	453.4 K	65.0 %	21,752	249.2 K	28.9 %	203.3 K	28.9 %	202.0 K
1234753 - Folgers	55,076	378.4 K	53,180	365.4 K	15	35,732	245.5 K	67.2 %	19,344	132.9 K	46.8 %	177.0 K	46.8 %	176.9 K
1235794 - Newman's	58,187	748.1 K	58,874	742.1 K	13	40,798	513.8 K	88.2 %	18,428	232.3 K	28.9 %	200.9 K	28.9 %	198.4 K
1235611 - Gencelia	54,255	683.9 K	53,675	676.6 K	20	26,368	332.4 K	49.1 %	27,887	351.5 K	28.2 %	193.0 K	28.2 %	190.9 K
1234765 - Folgers	51,836	356.1 K	49,828	343.0 K	14	32,164	221.0 K	64.4 %	19,673	155.2 K	49.7 %	177.0 K	49.7 %	170.5 K
1235632 - Newman's	57,543	725.3 K	57,155	720.4 K	17	27,971	352.8 K	48.9 %	29,572	372.8 K	27.6 %	200.5 K	27.6 %	199.1 K
1236556 - Folgers	48,597	333.9 K	45,956	315.7 K	13	23,705	162.9 K	51.6 %	24,892	171.0 K	53.0 %	177.0 K	53.0 %	167.4 K

WP IPI DT Assort Sales has been updated to reflect the planned assortment. In the preceding example, the planned assortment change is a net increase in the number of SKUs (43 core SKUs in CP, 48 core SKUs in WP). The system has predicted how the added SKUs cannibalize the sales of existing SKUs and its net impact on Category Sales, in the WP IPI DT Assort Sales.

Next, the IPI Demand Transferred and Lost Demand, as well as the substitutable demand and number of Significant SKU measures provide insight to the following:

- If this SKU is to be dropped from the assortment, how much of the demand is transferred to other SKUs in the assortment and how much of the demand is lost.
- How many similar SKUs exist in the assortment that will absorb some of the demand, if this SKU is to be dropped.



Figure 8–32 1a. Review IPI Assortment Recommendation Example 5

SKU	WP Mandatory	WP IPI Assort Core	WP IPI Assort Opt	WP MC Assort Core	WP MC Assort Opt	WP Seed Final Core/Opt	WP Assort Core	WP Assort Opt	Assort Core/Opt Error	WP Assort Core Count	WP Assort Opt Count	WP % Contribution of Category Items
1235806 - Peet's 100% Coffee		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>		15	0	16.48%
1236205 - Dunkin' Donuts		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>		1	0	1.10%
1235884 - Dunkin' Donuts		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>		1	0	1.10%
1236880 - Nescafe French		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>		1	0	1.10%
1236511 - Dunkin' Donuts		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>		1	0	1.10%
1235575 - Dunkin' Donuts		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>		1	0	1.10%
1235572 - Dunkin' Donuts		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>		1	0	1.10%
1236664 - Dunkin' Donuts		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>		1	0	1.10%
1236199 - Donut House U		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>		1	0	1.10%
1236832 - Nescafe Origin		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>		1	0	1.10%
1235674 - Seattle's Best F		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>		1	0	1.10%
1234825 - Tully's French F		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>		1	0	1.10%
1236193 - Donut House D		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>		1	0	1.10%
1234951 - Dunkin' Donuts		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>		1	0	1.10%
1234822 - Tully's Light F		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>		1	0	1.10%
1236874 - Maxwell House		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>		0	0	0.00%
1236856 - Folgers Break		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>		0	0	0.00%
1236847 - Folgers Dark R		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>		0	0	0.00%
1236841 - Folgers 100% C		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>		0	0	0.00%
1236823 - Maxwell House		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>		0	0	0.00%
1236808 - Folgers French		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>		0	0	0.00%
1236640 - Caribou Coffee		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>		0	0	0.00%

This contextually launches the IPI DT Details view with the z-axis already positioned with the highlighted SKU. It displays the SKUs to which this demand transfers and by what percentage.

### 1b. 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 8–33 1a. Review IPI Assortment Recommendation

SKU	WP DT Assort Sales U	WP DT Assort Sales R	DT No of Significant Subtable SKUs	WP DT Assort Subtable Demand Sales U	WP DT Assort Subtable Demand Sales R	WP Assort Demand Transferred %	WP DT Assort Incremental Demand Sales U	WP DT Assort Incremental Demand Sales R	WP Assort Gross Profit %	WP Assort Gross Profit R	WP DT Assort Gross Profit %	WP DT Assort Gross Profit R	
1235806 - Peet's 100% Coffee	33.83	845088.82	10158536.03	7	186893.54	2191086.11	19.78%	653389.78	6787113.45	19.87%	1877403.10	19.81%	2012726.18
1236205 - Dunkin' Donuts		104805.49	1180336.48	0	0.00	0.00	0.00%	0.00	0.00	17.51%	125160.21	17.51%	206637.82
1235884 - Dunkin' Donuts		77983.27	702161.41	7	13464.14	121277.83	17.27%	64489.12	500863.59	17.82%	125160.21	17.82%	125160.21
1236880 - Nescafe		27982.28	702161.41	7	8261.44	240032.43	34.18%	17830.84	462128.96	17.82%	125160.21	17.82%	125160.21
1236511 - Dunkin' Donuts								4315.51	18.37%	81790.57	552313.12	18.50%	125160.21
1235575 - Dunkin' Donuts								4871.70	21.82%	57617.89	518989.57	18.85%	125160.21
1235572 - Dunkin' Donuts								4313.58	25.74%	46771.03	474015.63	19.61%	125160.21
1236664 - Dunkin' Donuts								8014.75	34.47%	16140.05	418314.05	19.61%	125160.21
1236199 - Donut House U								80675.94	36.87%	10949.75	394886.89	20.01%	125160.21
1236832 - Nescafe								35688.58	27.75%	50180.03	451993.35	20.01%	125160.21
1235674 - Seattle's Best F								8074.16	20.57%	72077.18	486721.54	20.42%	125160.21
1234825 - Tully's French F								2649.69	3.99%	77261.33	608826.30	21.31%	125160.21
1234951 - Dunkin' Donuts								3518.85	25.63%	49684.97	503544.85	21.79%	125160.21
1234822 - Tully's Light F								7240.78	31.55%	42684.73	384479.22	22.28%	125160.21
1236874 - Maxwell House								8631.85	17.96%	17868.09	463097.95	22.28%	125160.21
1236856 - Folgers Break								5883.56	26.32%	48044.20	460146.39	22.28%	147236.68
1236847 - Folgers Dark R								0.00	0.00%	0.00	0.00%	0.00%	0.00
1236841 - Folgers 100% C								0.00	0.00%	0.00	0.00%	0.00%	0.00
1236823 - Maxwell House								0.00	0.00%	0.00	0.00%	0.00%	0.00
1236808 - Folgers French								0.00	0.00%	0.00	0.00%	0.00%	0.00
1236640 - Caribou Coffee								0.00	0.00%	0.00	0.00%	0.00%	0.00

**Figure 8–34 1b. Review IPI DT Details View**

	IPI DT Assort Demand Sales Received %	WP IPI DT Assort Demand Received Sales U	WP IPI DT Assort Demand Received Sales R	WP IPI DT Assort Sales U	WP IPI DT Assort Sales R
▼ all [RHS Product]	0.02	13464	121278	77953	702161
1236511 - Dunkin'	0.10	7579	68263		
1235575 - Dunkin'	0.02	1858	16738		
1236664 - Dunkin'	0.02	1185	10671		
1235674 - Seattles	0.01	888	8002		
1234951 - Dunkin'	0.01	737	6639		
1235884 - Dunkin'	0.01	642	5780		
1235572 - Dunkin'	0.01	576	5185		

Table 8–23 lists the measures available in this view.

**Table 8–23 1b. Review IPI DT Details Measures**

Label	Definition
IPI DT Demand Sales Received %	Refers to a percentage of total sales units of a SKU, getting transferred from it and being received by its respective substitute SKUs in an IPI-based assortment. It is expressed as a percentage of total sales of the SKUs.
WP IPI DT Assort Demand Received Sales U	Sales units that would be transferred to a substitute SKU (shown in the RHS hierarchy) from the SKU dropped (shown in the LHS hierarchy). For example, in the preceding view, if SKU 1236205 were to be dropped from the assortment, WP IPI DT Assort Demand Received Sales U for SKU 1236511 would be 7579 units.
WP IPI DT Assort Demand Received Sales R	Sales Retail value that would be transferred to a substitute SKU (shown in the RHS hierarchy) from the SKU dropped (shown in the LHS hierarchy). For example, in the preceding view, if SKU 1236205 were to be dropped from the assortment, WP IPI DT Assort Demand Received Sales R for SKU 1236511 would be 68263.
WP IPI DT Assort Sales U	The IPI assortment's net sales units after applying demand transference manually or through assortment improvement.
WP IPI DT Assort Sales R	The IPI assortment's net sales retail value after applying demand transference manually or through assortment improvement.

## 2. IPI Assortment Dashboard View

Use this view to review and compare the alignment of IPI assortment plan numbers to the set targets in the form of MFP and CP targets at the sub-category level and above:

- Assortment Plan numbers consist of measures presenting the Sales Retail, Sales Units, Gross Profit Retail, and Gross Profit %.
- Targets consist of MFP Sales R, MFP Sales U, MFP Gross Profit and MFP Gross Profit %

**Figure 8–35 2. IPI Assortment Dashboard View**

	Ground	Instant	Single Serve	Whole
MFP Gross Profit %	26%	13%	34%	24%
MFP Sales R	10245589.48	4867161.21	912546.23	1865206.98
WP IPI Assort Gross Profit %	27%	33%	24%	26%
WP IPI Assort Sales R	27132701.35	13339584.19	2158474.23	4940575.40
WP IPI Assort Core Count	61.00	30.00	6.00	10.00
WP Mandatory Count	5.00	5.00	0.00	0.00
CP Target Gross Profit %	53%	57%	48%	49%
CP Target Sales R	17957159.10	8828499.33	1428536.90	3269807.06
LY Gross Profit %	42%	42%	30%	48%
LY Sales R	13106627.34	6220558.41	1144103.72	2378327.91
LY Assort Core Count	61	30	6	10
WP IPI Assort Count var to	0.00	0.00	0.00	0.00
WP IPI Assort Gross Profit	0.33	0.39	1.04	0.03
WP IPI Assort Gross Profit	-0.23	-0.27	0.04	-0.26
WP IPI Assort Gross Profit	1.75	1.84	5.16	0.87
WP IPI Assort Sales var to	1.07	1.14	0.89	1.08
WP IPI Assort Sales var to	0.51	0.51	0.51	0.51
WP IPI Assort Sales var to	1.65	1.74	1.37	1.65

Table 8–24 lists the measures available in this view.

**Table 8–24 2. IPI Assortment Dashboard View Measures**

Label	Description
MFP Gross Profit %	Merchandise Financial Plan's Gross Profit percentage.
MFP Sales R	Merchandise Financial Plan's Sales Retail value.
WP IPI Assort Gross Profit %	IPI Assortment's base gross profit percentage.
WP IPI Assort Sales R	IPI assortment's base sales retail value.
WP IPI Assort Core Count	The number of core items in the IPI assortment.
WP Mandatory Count	The number of items marked as mandatory.
CP Target Gross Profit %	Approve Category Plan's Gross Profit percentage.
CP Target Sales R	Approve Category Plan's Sales Retail value.
LY Gross Profit %	Last Year's Gross Profit percentage. Similar measures in other versions include: WP Gross Profit % and CP Gross Profit %.
LY Sales R	Last Year's Sales Retail value. Similar measures in other versions include: WP Sales R and CP Sales R.
LY Sales U	Last Year's Sales Units. Similar measures in other versions include: WP Sales U, CP Sales U.
LY Assort Core Count	The number of core items in last year's assortment. Similar measures in other versions include: CP Assort Core Count, WP Assort Core Count and LP Assort Core Count.
WP IPI Assort Gross Profit var to LY R	The variance in gross profit retail between the IPI assortment and last year assortment. Similar measures available with comparison to other planning measures include: WP IPI Assort Gross Profit var to CP R, WP IPI Assort Gross Profit var to MFP R, and WP IPI Assort Gross Profit var to Tgt R.
WP IPI Assort Sales var to LY R	The variance in sales retail value between the IPI assortment and last year assortment. Similar measures available with variance to other planning measures include: WP IPI Assort Sales var to CP R, WP IPI Assort Sales var to MFP R, and WP IPI Assort Sales var to Tgt R.

**Table 8–24 (Cont.) 2. IPI Assortment Dashboard View Measures**

<b>Label</b>	<b>Description</b>
WP IPI Assort Sales var to LY U	The variance in sales units between the IPI assortment and last year assortment. Similar measures available with variance to other planning measures include: : WP IPI Assort Sales var to CP U, WP IPI Assort Sales var to MFP U, and WP IPI Assort Sales var to Tgt U.
WP IPI DT Assort Sales var to LY U	The variance between the IPI assortment's demand transference affected sales units and last year assortment's sales units. Similar measures available with variation to other plan measures: WP IPI DT Assort Sales var to CP U, WP IPI DT Assort Sales var to MFP U, and WP IPI DT Assort Sales var to Tgt U.
WP IPI DT Assort Gross Profit var to LY R	The variance between the IPI assortment's demand transference affected gross profit value and last year assortment's gross profit retail value. Similar measures available with variation to other plan measures: WP IPI DT Assort Gross Profit var to CP R, WP IPI DT Assort Gross Profit var to MFP R, and WP IPI DT Assort Gross Profit var to Tgt R.
WP IPI DT Assort Private Label Sales var to LY U	The variance between the private label item's demand transference affected sales units in the IPI assortment and last year assortment. Similar measures available with variance to other planning measures: WP IPI Assort Private Label Sales var to CP U and WP IPI Assort Private Label Sales var to Tgt U.
WP IPI DT Assort Private Label Sales var to LY R	The variance between the private label item's demand transference affected sales retail value in the IPI assortment and last year assortment. Similar measures available with variance to other planning measures: WP IPI Assort Private Label Sales var to CP R and WP IPI Assort Private Label Sales var to Tgt R.
WP IPI DT Assort Private Label Gross Profit var to LY R	The variance between the private label item's demand transference affected gross profit retail values in the IPI assortment and last year assortment. Similar measures available with variance to other planning measures: WP IPI Assort Private Label Gross Profit var to CP R and WP IPI Assort Private Label Gross Profit var to Tgt R.

## Improve IPI Assortment Tab

The Assortment Improvement process is used to better the draft assortment plan on different retail planning parameters such as Sales Units, Sales Retail, and Gross Profit Retail. In principle, assortment improvement automates the manual application of demand transference in the Review Assortment type views and widens its scope by considering all eligible items (Assortment Eligibility flag) in the assortment improvement operation, including the ones which are not part of the draft assortment. This feature provides an option to set the constraints on which assortment improvement needs to be performed by the system. This feature comes in handy to fine-tune draft assortment plans per the business requirement.

Assortment Improvement provides the following modes (referred to as Improvement Operation) to better the assortment plan, which need to be defined before running the assortment improvement operation:

- **Add:** This mode provides an option to add new items to the assortment to improve any of the three plan parameters: Sales Units, Sales Retail, and Gross Profit Retail. The system searches for the best available options, by gauging the quantum of incremental sales, for a new item brings to the assortment on addition. The number of items to be added to the assortment needs to be specified before running the assortment improvement operation.

- **Remove:** This operation provides an option to remove items from the assortment by looking for the items, which reduces the assortment plan numbers by a relatively minimal value for any of the three parameters set for improvement. The number of items to be removed should be specified.
- **Swap:** This provides an option to exchange or replace items in an assortment with eligible items outside the assortment to better the assortment plan on the set parameter with the best available items. The assortment count remains the same in this operation.
- **Add with Swap:** This option facilitates the addition of eligible items to the assortment with simultaneous exchange or replacement of items in the assortment. The number of items to be added with swap has to be set.
- **Remove with Swap:** This option facilitates the removal of items by exchanging them with eligible items outside the assortment. The number of items to be removed with the swap should be defined before applying assortment improvement.

The following parameters need to be set before assortment improvement:

- **Metric to Improve:** Specify the parameters on which the assortment improvement operation needs to be performed: Sales Units, Sales Retail, and Gross Profit Retail.
- **Number of SKUs to Add/Remove:** Set the number of items which should be added or removed from the assortment if the improvement operation is Add, Remove, Add with Swap, or Remove with Swap.
- **Max % Assortment to Swap:** This controls the percentage of the assortment that can be swapped out during the assortment improvement operation. If the draft assortment is close to the final desired assortment, this parameter can be used to restrict the scope of assortment changes, thus fine-tuning the assortment without extensively searching for swap options. Restricting the scope of assortment changes can also make the assortment improvement operation run more quickly. To not have any restrictions, set the Max % to Swap to 100%.
- **IPI K/A/D Input:** The reference assortment, against which assortment changes to the working plan assortment are measured and demand transference is calculated, needs to be defined. The available options are Last Year Assortment (WP/LY) and Current Plan Assortment (WP/CP).
- **Optimization Target:** This is an optional setting. The target, to which the assortment improvement operation for the specified metric for improvement needs to align to, should be defined here.

Specifying a value for the target directs the assortment improvement operation to make changes in the assortment (either additions or removals) so that the resulting assortment has a metric value at or above the target and also has a minimal number of items. If a target is specified, the Number of SKUs to Add/Remove measure is ignored, since the operation determines the appropriate assortment size on its own. The available options are MFP targets and CP targets.

This user-defined assortment improvement parameter takes the highest precedence among all the set parameters. For example, if the Improve Operation is Add and the Number of SKUs to Add/Remove equals 5, the system will be recommend an improved assortment on the basis of the set Optimization Target. MFP and CP targets are available.

**Note:**

- If both the Number of SKUs to Add/Remove and Optimization Target are defined, the improvement operation will keep adding/removing items until it

reaches the Optimization Target. If the improvement operation does not reach the Optimization Target, the improvement operation will stop when it reaches the Number of SKUs to Add/Remove constraint.

- If an Optimization Target is not specified (option set to None), the improvement operation will stop when it reaches the Number of SKUs to Add/Remove.
- If Max % Assortment to Swap is defined with an Optimization Target, the Max % Assortment to Swap remains applicable unlike the Number of SKUs to Add/Remove.

**Prior to using Assortment Improvement functionality:**

- An approved category plan should be available.
- MFP targets should be imported into RCM.
- An IPI assortment should be in place.
- Demand transference should be run on the IPI assortment to populate the demand transference measures.

**After completing this activity:**

View the incremental curve based on IPI ranking in the next tab.

**1. Set Parameters for IPI Assortment Improvement View**

Use this view to set the assortment improvement constraints.

**Figure 8–36 1. Set Parameters for IPI Assortment Improvement View**

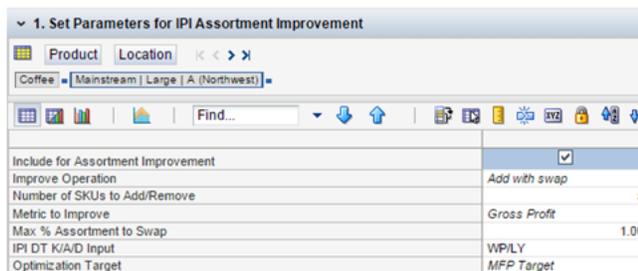


Table 8–25 lists the measures available in this view.

**Table 8–25 1. Set Parameters for IPI Assortment Improvement View Measures**

Label	Description
Include for Assortment Improvement	A Boolean measure that needs to be checked to run assortment improvement using the Apply IPI Assortment Improvement custom menu.
Improve Operation	A drop-down measure to select one of the five available options for Assortment Improvement: Add, Remove, Swap, Add with Swap, and Remove with Swap.
Number of SKUs to Add/Remove	This measure is used to define the number of items to be added or removed from the assortment while performing assortment improvement using Add, Remove, Add with Swap, or Remove with Swap modes.

**Table 8–25 (Cont.) 1. Set Parameters for IPI Assortment Improvement View Measures**

Label	Description
Metric to Improve	A drop-down measure to select the metric on which assortment improvement should be performed. The list of available measures consists of Sales Units, Sales Retail, and Gross Profit Retail.
Max % Assortment to Swap	This measure is used to define the scope of assortment improvement in terms of the percentage of the assortment's range or SKU count that can be swapped.
IPI DT K/A/D Input	This field provides an option to define the assortment with which the working plan assortment should be compared to calculate the Keep, Add, or Drop actions for it.
Optimization Target	This measure is used to define the target to which an assortment plan should align through the assortment improvement operation. The available options are: MFP Target or CP Target. Specifying an optimization target is optional. If it is defined, the specified Metric to Improve, along with the set Optimization Target, determines the metric to which assortment improvement is performed from the following possible combinations: MFP Sales Units, MFP Sales Retail, MFP Gross Profit Retail, CP Target Sales Units, CP Target Sales Retail, or CP Target Gross Profit Retail.

## 2. Review Improved IPI Assortment View

Use this view to review and compare improved assortment recommendations (Improved Sales U, Improved Sales R, Improved Gross Profit R, Improved Gross Profit %) per the set constraints against the IPI assortment (IPI DT Assort Sales U, IPI DT Assort Sales R, IPI DT Assort Gross Profit R, IPI DT Assort Gross Profit %). If the improved assortment plan meets the required improvement, accept it by checking WP Accept Results for Cluster and running the Accept IPI Assortment Improvement custom menu.

Accepting the assortment improvement results copies the improved assortment plan measures' values to the IPI DT Assort type measures.

### Custom Menu

The Apply IPI Assortment Improvement custom menu is used to generate IPI Assortment Improvement recommendations. These recommendations are presented in the Improved Assort type measures. Once the required IPI Assortment Improvement constraints have been set, check the Include for Assortment Improvement flag measure and run this custom menu to generate the assortment improvement recommendations.

**Figure 8–37 2. Review Improved IPI Assortment View**

	WP Accept Results for Cluster	WP Mandatory	WP-IP Assort Core	WP-IP Assort Core Count	Improved Assort Core	Improved Assort Core Count	WP-IP DT Assort Sales U	WP-IP DT Assort Sales R	WP-IP DT Assort Gross Profit R	WP-IP DT Assort Gross Profit %	Improved Assort Sales U	Improved Assort Sales R	
▼ Coffee	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		61.00		61.00	2412035.63	27132791.35	0.00	0.00	2412035.63	27132791.35
1234562 - Folgers	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		1.00		1.00	24089.44	163237.64	0.00	0.00	24089.44	163237.64
1234600 - Maxwell	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		0.00		0.00	0.00	0.00	0.00	0.00	0.00	0.00
1234615 - Maxwell	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		0.00		0.00	0.00	0.00	0.00	0.00	0.00	0.00
1234747 - Folgers	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		1.00		1.00	36104.16	244855.86	0.00	0.00	36104.16	244855.86
1234753 - Folgers	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		1.00		1.00	40917.76	277953.19	0.00	0.00	40917.76	277953.19
1234759 - Folgers	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		1.00		1.00	31290.20	212298.73	0.00	0.00	31290.20	212298.73
1234762 - Folgers	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		1.00		1.00	36104.16	244855.86	0.00	0.00	36104.16	244855.86
1234765 - Folgers	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		1.00		1.00	38510.60	261179.63	0.00	0.00	38510.60	261179.63
1234768 - PL 100%	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		1.00		1.00	25982.89	234331.56	0.00	0.00	25982.89	234331.56

Table 8–26 lists the measures available in this view.

**Table 8–26 2. Review Improved IPI Assortment View Measures**

<b>Label</b>	<b>Description</b>
WP Accept Results for Cluster	A Boolean flag measure that needs to be checked to accept the assortment improvement results. Acceptance of assortment improvement results copies the assortment improvement recommended plan measures to the respective IPI DT measures.
WP Mandatory	A Boolean flag measure used to mark an item as mandatory in a working plan assortment for the cluster. Similar measures in other versions include: LY Mandatory, CP Mandatory, and LP Mandatory.
WP IPI Assort Core	An editable Boolean measure indicating whether an item is a core item in the IPI Assortment. It can be used to change the core items in an IPI assortment..
WP IPI Assort Core Count	The number of core items in the IPI assortment at the cluster level.
Improved Assort Core	A Boolean flag measure indicating whether an item is a core item in the improved assortment or assortment improvement recommended assortment.
Improved Assort Core Count	The number of core items in the improved assortment or assortment improvement recommended assortment.
WP IPI DT Assort Sales U	The IPI assortment's net sales units after applying demand transference manually or through assortment improvement.
WP IPI DT Assort Sales R	The IPI assortment's net sales retail value after applying demand transference manually or through assortment improvement.
WP IPI DT Assort Gross Profit R	The IPI assortment's net gross profit retail value after applying demand transference manually or through assortment improvement.
WP IPI DT Assort Gross Profit %	The IPI assortment's net gross profit percentage after applying demand transference manually or through assortment improvement.
Improved Assort Sales U	The improved assortment's (or Assortment Improvement recommended assortment's) sales units.
Improved Assort Sales R	The improved assortment's (or Assortment Improvement recommended assortment's) sales retail value.
Improved Assort Gross Profit R	The improved assortment's (or Assortment Improvement recommended assortment's) gross profit retail value.
Improved Assort Gross Profit %	The improved assortment's (or Assortment Improvement recommended assortment's) gross profit percentage.
MFP Sales U	Merchandise Financial Plan's Sales Units.
MFP Sales R	Merchandise Financial Plan's Sales Retail value.
MFP Gross Profit R	Merchandise Financial Plan's Gross Profit Retail value.
MFP Gross Profit %	Merchandise Financial Plan's Gross Profit Percentage value.
CP Target Sales U	Category Plan's target Sales Units.
CP Target Sales R	Category Plan's target Sales Retail value.
CP Target Gross Profit R	Category Plan's target Gross Profit Retail value.
CP Target Gross Profit %	Category Plan's target Gross Profit Retail Percentage value.

**Table 8–26 (Cont.) 2. Review Improved IPI Assortment View Measures**

<b>Label</b>	<b>Description</b>
WP Assortment Eligibility	A Boolean flag measure indicating whether an item is eligible to be part of the assortment for the retailer to stock and sell.
WP Gross Profit %	Working Plan's Gross Profit Retail Percentage value at the cluster level.
WP Gross Profit R	Working Plan's Gross Profit Retail Value at the cluster level.
WP IPI Assort Sales R	The IPI assortment's Sales Retail value at the cluster level.
WP IPI Assort Sales U	The IPI assortment's Sales Units value at the cluster level.
WP IPI Assort Gross Profit %	The IPI assortment's Gross Profit retail percentage value at the cluster level.
WP IPI Assort Gross Profit R	The IPI assortment's Gross Profit Retail value at the cluster level.
WP IPI Assort Optn	A Boolean flag measure indicating whether an item is an optional item in the IPI assortment at the cluster level.
WP IPI Assort Optn Count	The number of optional items in the IPI assortment at the cluster level.
WP Sales AUR	Working plan's Average Unit Retail value at the cluster level. It is calculated by dividing total Sales Retail Value by total Sales Units.
WP Sales R	Working Plan's Sales Retail Value at the cluster level.
WP Sales U	Working Plan's Sales Units at the cluster level.

## IPI Ordered Incremental Curve Tab

This tab has one view.

### View IPI Ordered Incremental Curve View

Use this view to ascertain an optimal assortment range through incremental curve based on IPI ranking by running the Calc IPI Incremental Curve custom menu.

Incremental Curves are used to gauge the correctness of the assortment range. Incremental sales represent the unique or non-substitutable sales for any item in a given assortment. Incremental Curves provide a visibility to the point where the cumulative incremental sales flatten out in the assortment and there is overlap of sales between the SKUs (also referred to as cannibalization of sales). This helps the assortment planner to decide the quantum of substitutable sales that needs to be planned in the case of a stock-out situation of a few SKUs. In effect, they facilitate the derivation of an optimal assortment range.

### Custom Menu

The Calc Incremental Curve custom menu is used to generate an incremental curve based on IPI ordering, so as to derive an optimal assortment range.

**Figure 8–38 View IPI Ordered Incremental Curve View**

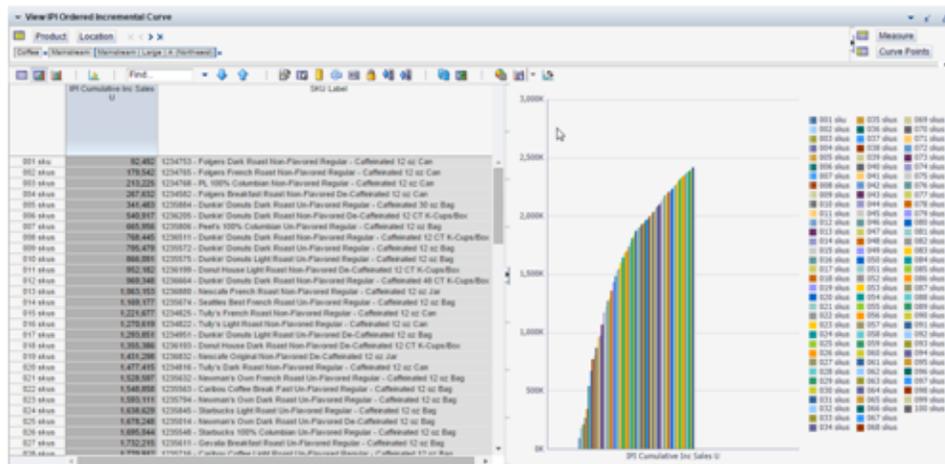


Table 8–27 lists the measures available in this view.

**Table 8–27 View IPI Ordered Incremental Curve View Measures**

Label	Description
IPI Cumulative Inc Sales U	The cumulative sum of the incremental sales units when the incremental curve is calculated using IPI ranking.
SKU Label	Item's label.

## Manage Market Coverage Assortment Step

Use this step to review, revise, and manage a Market Coverage assortment.

This step has the following tab and views:

- [Review Market Coverage Assortment Recommendation Tab:](#)
  - 1a. [Review Market Coverage Assortment Recommendation View](#)
  - 1b. [Review Market Coverage DT Details](#)
  2. [Market Coverage Assortment Dashboard View](#)
- [Market Coverage Ordered Incremental Curve Tab](#)
  - [View MC Ordered Incremental Curve View](#)

## Custom Menu Options

The following custom menu options are available:

- [Apply DT to Market Coverage](#)
- [Calc MC Incremental Curve](#)

## Review Market Coverage Assortment Recommendation Tab

This tab has three views.

### 1a. Review Market Coverage 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 do

What-If analysis by making assortment changes. Assortment changes are made by marking or unmarking the Market Coverage based Core or Optional flags, thereby adding or removing SKUs/Items from the assortment. Keep, Add, and Drop decisions are derived relative to a reference assortment such as an LY assortment, CP assortment.

This view has four measure profiles:

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

**Figure 8–39 1a. Review Assortment Recommendation WP/CP Measure Profile View**

1a. Review Market Coverage Assortment Recommendation					
Location < < > >					
Mainstream   Large   A (Northwest)					
Find...					
	☑ Coffee	1234582 - Folgers Breakfast Roast Non-Flavored De-Caffeinated 12 oz Can	1234600 - Maxwell House 100% Colombian Non-Flavored De-Caffeinated 12 oz Can	1234615 - Maxwell House Breakfast Roast Non-Flavored De-Caffeinated 12 oz Can	1234747 - Folgers 100% Colombian Non-Flavored Regular - Caffeinated 12 oz Can
LY Market Sales @ Cluster R	33908365.00	171697.81	246261.55	285764.68	257546.09
LY Market Sales Rank	1	76	57	46	50
WP Sales R	22355744.79	129814.70	0.00	0.00	194721.57
WP Mandatory	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MC Core Recommended	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MC Optn Recommended	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
WP MC Assort Core	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WP MC Assort Optn	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
MC Core/Optn Error					
CP Assort Core	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CP Assort Optn	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MC Core Recommended Count	63.00	0.00	0.00	0.00	0.00
MC Optn Recommended Count	12.00	0.00	1.00	1.00	1.00
WP MC Assort Core Count	63.00	0.00	0.00	0.00	0.00
WP MC Assort Optn Count	12.00	0.00	1.00	1.00	1.00
CP Assort Core Count	15	0	0	0	0
CP Assort Optn Count	0	0	0	0	0
MC Core Recommended Sales R %	5.66%	0.00%	0.00%	0.00%	0.00%
MC Optn Recommended Sales R %	5.66%	0.00%	0.00%	0.00%	3.71%
WP MC Assort Core Coverage Sales R %	5.66%	0.00%	0.00%	0.00%	0.00%
WP MC Assort Optn Coverage Sales R %	5.66%	0.00%	0.00%	0.00%	3.71%

Table 8–28 lists the measures available in this view.

**Table 8–28 1a. Review Assortment Recommendation WP/CP Measure Profile Measures**

Label	Definition
LY Market Sales @ Cluster R	Last year's market sales for the cluster. It is typically sourced from third parties providing syndicated data on a quarterly basis.

**Table 8–28 (Cont.) 1a. Review Assortment Recommendation WP/CP Measure Profile**

<b>Label</b>	<b>Definition</b>
LY Market Sales Rank	An ordinal rank assigned on the basis of the LY Market Sales R of an item within a product category.
WP Sales R	The working plan assortment's sales retail value.
WP Mandatory	A Boolean flag measure used to mark an item as mandatory in a working plan assortment for the cluster.
MC Core Recommended	A read-only Boolean measure indicating whether an item is an optional item in the Market Coverage Assortment for the cluster. This measure is calculated by the system on the basis of the Market Coverage thresholds set by the user.
MC Optn Recommended	A read-only Boolean measure indicating whether an item is an optional item in the Market Coverage Assortment for the cluster. This measure is calculated by the system on the basis of the Market Coverage thresholds set by the user.
WP MC Assort Core	An editable Boolean measure indicating whether an item is a core item in the Market Coverage Assortment. It can be used to change the core items in a Market Coverage assortment..
WP MC Assort Optn	An editable Boolean measure indicating whether an item is an optional item in the Market Coverage Assortment. It can be used to change the optional items in a Market Coverage assortment.
MC 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	A Boolean flag measure indicating whether an item is a core item in the current plan's assortment for the cluster.
CP Assort Optn	A Boolean flag measure indicating whether an item is an optional item in the current plan assortment for the cluster.
MC Core Recommended Count	The number of core items in a Market Coverage Assortment per the MC Core Recommended measure.
MC Optn Recommended Count	The number of core items in a Market Coverage Assortment per the MC Optn Recommended measure.
WP MC Assort Core Count	The number of core items in a Market Coverage Assortment per the WP MC Assort Core measure.
WP MC Assort Optn Count	The number of optional items in a Market Coverage Assortment per the WP MC Assort Optn measure.
CP Assort Core Count	The number of core items in a current plan's assortment for the cluster.
CP Assort Optn Count	The number of optional items in a current plan assortment for the cluster.
MC Core Recommended Sales R %	Market Coverage provided by core SKUs in the recommended assortment (Market Coverage Assortment).
MC Optn Recommended Sales R %	Market Coverage provided by optional SKUs in the recommended assortment (Market Coverage Assortment).
WP MC Assort Core Coverage Sales R %	Market Coverage provided by the core SKUs per the Market Coverage Assortment.
WP MC Assort Optn Coverage Sales R %	Market Coverage provided by the optional SKUs in the Market Coverage Assortment.
CP Assort Core Coverage Sales R %	Market coverage provided by core SKUs in the current plan assortment.

**Table 8–28 (Cont.) 1a. Review Assortment Recommendation WP/CP Measure Profile**

Label	Definition
CP Assort Optn Coverage Sales R %	Market coverage provided by optional SKUs in the current plan assortment.

**Figure 8–40 1a. Review Market Coverage Assortment Recommendation WP/DT Measure Profile View 1**

1a. Review Market Coverage Assortment Recommendation					
Location: Mainstream   Large   A (Northwest)					
Find...					
	1234582 - Folgers Breakfast Roast Non-Flavored De-Caffeinated 12 oz Can	1234600 - Maxwell House 100% Columbian Non-Flavored De-Caffeinated 12 oz Can	1234615 - Maxwell House Breakfast Roast Non-Flavored De-Caffeinated 12 oz Can	1234747 - Folgers 100% Columbian Non-Flavored Regular - Caffeinated 12 oz Can	
LY Market Sales @ Cluster R	33908365.00	171697.81	246261.55	285764.68	257546.09
LY Market Sales Rank	1	76	57	46	50
WP Sales R	22355744.79	129814.70	0.00	0.00	194721.57
WP Mandatory	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MC Core Recommended	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MC Optn Recommended	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
WP MC Assort Core	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WP MC Assort Optn	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
MC Core/Optn Error					
WP MC Assort Core Count	63.00	0.00	0.00	0.00	0.00
WP MC Assort Optn Count	12.00	0.00	1.00	1.00	1.00
LY Assort Core	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
LY Assort Optn	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LY Assort Core Count	61	1	0	0	1
LY Assort Optn Count	0	0	0	0	0
CP Assort Core	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CP Assort Optn	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CP Assort Core Count	15	0	0	0	0
CP Assort Optn Count	0	0	0	0	0
WP MC Assort Compare to LY	? Drop				Drop
WP MC Assort Compare to CP	?				

Table 8–29 lists the measures available in this view.

**Table 8–29 1a. Review Market Coverage Assortment Recommendation WP/DT Measure Profile View 1 Measures**

Label	Definition
LY Market Sales @ Cluster R	Last year's market sales for the cluster. It is typically sourced from third parties providing syndicated data on a quarterly basis.
LY Market Sales Rank	An ordinal rank assigned on the basis of the LY Market Sales R of an item within a product category.
WP Sales R	The working plan assortment's sales retail value.
WP Mandatory	A Boolean flag measure used to mark an item as mandatory in a working plan assortment for the cluster.

**Table 8–29 (Cont.) 1a. Review Market Coverage Assortment Recommendation WP/DT Measure Profile View 1 Measures**

<b>Label</b>	<b>Definition</b>
MC Core Recommended	The number of core items per the Market Coverage calculations in a system-recommended Market Coverage based working plan assortment for the cluster.
MC Optn Recommended	The number of optional items per the Market Coverage calculations in a system-recommended Market Coverage based working plan assortment for the cluster.
WP MC Assort Core	The number of core items in a Market Coverage Assortment per the WP MC Assort Core measure.
WP MC Assort Optn	The number of optional items in a Market Coverage Assortment per the WP MC Assort Optn measure.
WP MC 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 MC Assort Core Count	The number of core items in a Market Coverage Assortment per the WP MC Assort Core measure.
WP MC Assort Optn Count	The number of optional items in a Market Coverage Assortment per the WP MC Assort Optn measure.
LY Assort Core	A Boolean flag measure indicating whether an item is a core item in last year's assortment for the cluster.
LY Assort Optn	A Boolean flag measure indicating whether an item is an optional item in last year's assortment for the cluster.
LY Assort Core Count	The number of core items in last year's assortment.
LY Assort Optn Count	The number of optional items in a last year's assortment.
CP Assort Core	A Boolean flag measure indicating whether an item is a core item in the current plan's assortment for the cluster.
CP Assort Optn	A Boolean flag measure indicating whether an item is an optional item in the current plan assortment for the cluster.
CP Assort Core Count	The number of core items in a current plan's assortment for the cluster.
CP Assort Optn Count	The number of optional items in a current plan assortment for the cluster.

**Figure 8–41 1a. Review Market Coverage Assortment Recommendation WP/DT Measure Profile View 2**

1a. Review Market Coverage Assortment Recommendation						
Location << >>						
Mainstream   Large   A (Northwest)						
Find...						
Product	1234582 - Folgers Breakfast Roast Non-Flavored De-Caffeinated 12 oz Can	1234600 - Maxwell House 100% Columbian Non-Flavored De-Caffeinated 12 oz Can	1234615 - Maxwell House Breakfast Roast Non-Flavored De-Caffeinated 12 oz Can	1234747 - Folgers 100% Columbian Non-Flavored Regular - Caffeinated 12 oz Can	1234753 - Folgers Dark Roast Non-Flavored Regular - Caffeinated 12 oz Can	
CP Assort Core	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CP Assort Optn	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CP Assort Core Count	15	0	0	0	0	0
CP Assort Optn Count	0	0	0	0	0	0
WP MC Assort Compare to LY	?	Drop			Drop	Keep
WP MC Assort Compare to CP	?					Add
MC DT K/A/D Input	WP/LY					
WP MC Assort Sales U	1780139.95	0.00	0.00	0.00	0.00	32680.55
WP MC Assort Sales R	20494202.10	0.00	0.00	0.00	0.00	220684.35
WP MC DT Assort Sales U	2117010.38	0.00	0.00	0.00	0.00	49519.55
WP MC DT Assort Sales R	20359986.69	0.00	0.00	0.00	0.00	334394.23
MC DT No of Significant Substitute SKUs	62	0	0	0	0	7
WP MC DT Assort Substitutable Demand Sales U	607800.60	0.00	0.00	0.00	0.00	4346.66
WP MC DT Assort Substitutable Demand Sales R	5800487.67	0.00	0.00	0.00	0.00	29351.98
WP MC DT Assort Demand Transferred %	28.71%	0.00%	0.00%	0.00%	0.00%	8.78%
WP MC DT Assort Incremental Demand Sales U	1509209.77	0.00	0.00	0.00	0.00	45172.89
WP MC DT Assort Incremental Demand Sales R	14559499.02	0.00	0.00	0.00	0.00	305042.25
WP MC Assort Gross Profit %	38.47%	0.00%	0.00%	0.00%	0.00%	56.71%
WP MC Assort Gross Profit R	7885093.04	0.00	0.00	0.00	0.00	125160.21
WP MC DT Assort Gross Profit %	30.94%	0.00%	0.00%	0.00%	0.00%	56.71%
WP MC DT Assort Gross Profit R	6299963.81	0.00	0.00	0.00	0.00	189650.30

Table 8–30 lists the measures available in this view.

**Table 8–30 1a. Review Market Coverage Assortment Recommendation WP/DT Measure Profile View 2 Measures**

Label	Definition
WP MC Assort Compare to LY	Keep, Add, or Drop decision on comparing a Market Coverage based assortment with an LY assortment at the cluster level.
WP MC Assort Compare to CP	Keep, Add, or Drop decision on comparing a Market Coverage based assortment with a Current Plan assortment at the cluster level.
MC DT K/A/D Input	This field provides an option to the user to choose the reference assortment which is used to compare and calculate Keep, Add, or Drop actions for the working plan assortment for cluster. This measure is specific for a Market Coverage based assortment.
WP MC Assort Sales U	Sales Retail of an item present in the Market Coverage based assortment for a cluster.
WP MC Assort Sales R	Sales Units of an item present in the Market Coverage based assortment for a cluster.
WP MC DT Assort Sales U	Planned Sales Units with Demand Transference impact for the Market Coverage based assortment.
WP MC DT Assort Sales R	Planned Sales Retail with Demand Transference impact for the Market Coverage based assortment.

**Table 8–30 (Cont.) 1a. Review Market Coverage Assortment Recommendation WP/DT Measure Profile View 2 Measures**

<b>Label</b>	<b>Definition</b>
MC DT No of Significant Substitute SKUs	Refers to the count of SKUs which can absorb the significant chunk of substitutable demand of a SKU in a Market Coverage based working plan assortment for the cluster. Represents the number of SKUs that demand will transfer to, if this SKU is dropped from the assortment.
WP MC DT Substitute Demand Sales U	Refers to the replaceable sales units of a SKU, in case it is dropped from a Market Coverage based assortment.
WP MC DT Substitute Demand Sales R	Refers to the respective replaceable sales retail for substitutable sales dollars for a SKU in a Market Coverage based assortment.
WP MC DT Demand Transferred %	Represents the percentage of the total demand of the SKU that will get transferred to other SKUs in the Planned Market assortment if this SKU is to be dropped from the assortment.
WP MC DT Lost Demand Sales U	Represents the demand units of the SKU that will be lost or not transferred to other SKUs in the Planned Market assortment if this SKU is dropped from the assortment. It represents the true incremental sales of the SKU to the assortment.
WP MC DT Lost Demand Sales R	Represents the demand retail of the SKU that will be lost or not transferred to other SKUs in the Planned Market assortment if this SKU is dropped from the assortment. It represents the true incremental sales retail of the SKU to the assortment.
WP MC Assort Gross Profit %	The gross profit percentage value in a system-recommended market coverage assortment towards the working plan assortment.
WP MC Assort Gross Profit R	The gross profit retail value in a system-recommended market coverage assortment towards the working plan assortment.

**Figure 8–42 1a. Review Market Coverage Assortment Recommendation WP/LP Measure Profile View**

1a. Review Market Coverage Assortment Recommendation						
Location: Mainstream   Large   A (Northwest)						
Find...						
	Coffee	1234582 - Folgers Breakfast Roast Non-Flavored De-Caffeinated 12 oz Can	1234600 - Maxwell House 100% Columbian Non-Flavored De-Caffeinated 12 oz Can	1234615 - Maxwell House Breakfast Roast Non-Flavored De-Caffeinated 12 oz Can	1234747 - Folgers 100% Columbian Non-Flavored Regular - Caffeinated	1234753 - Folgers Dark Roast Non-Flavored Regular - Caffeinated 12 oz Can
LY Market Sales @ Cluster R	33908365.00	171697.81	246261.55	285764.68	257546.09	291885.44
LY Market Sales Rank	1	76	57	46	50	44
WP Sales R	22355744.79	129814.70	0.00	0.00	194721.57	220684.35
WP Mandatory	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MC Core Recommended	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
MC Optn Recommended	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
WP MC Assort Core	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
WP MC Assort Optn	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
MC Core/Optn Error						
LP Assort Core	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LP Assort Optn	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MC Core Recommended Count	63.00	0.00	0.00	0.00	0.00	1.00
MC Optn Recommended Count	12.00	0.00	1.00	1.00	1.00	0.00
WP MC Assort Core Count	63.00	0.00	0.00	0.00	0.00	1.00
WP MC Assort Optn Count	12.00	0.00	1.00	1.00	1.00	0.00
LP Assort Core Count	0	0	0	0	0	0
LP Assort Optn Count	0	0	0	0	0	0
MC Core Recommended Sales R %	5.66%	0.00%	0.00%	0.00%	0.00%	4.10%
MC Optn Recommended Sales R %	5.66%	0.00%	0.00%	0.00%	3.71%	0.00%
WP MC Assort Core Coverage Sales R %	5.66%	0.00%	0.00%	0.00%	0.00%	4.10%
WP MC Assort Optn Coverage Sales R %	5.66%	0.00%	0.00%	0.00%	3.71%	0.00%
LP Assort Core Coverage Sales R %	0.00	0.00	0.00	0.00	0.00	0.00
LP Assort Optn Coverage Sales R %	0.00	0.00	0.00	0.00	0.00	0.00

Table 8–31 lists the measures available in this view.

**Table 8–31 1a. Review Market Coverage Assortment Recommendation WP/LP Measure Profile Measures**

Label	Definition
LY Market Sales @ Cluster R	Last year's market sales for the cluster. It is typically sourced from third parties providing syndicated data on a quarterly basis.
LY Market Sales Rank	An ordinal rank assigned on the basis of the LY Market Sales R of an item within a product category.
WP Sales R	The working plan assortment's sales retail value.
WP Mandatory	A Boolean flag measure used to mark an item as mandatory in a working plan assortment for the cluster.
MC Core Recommended	A read-only Boolean measure indicating whether an item is an optional item in the Market Coverage Assortment for the cluster. This measure is calculated by the system on the basis of the Market Coverage thresholds set by the user..
MC Optn Recommended	A read-only Boolean measure indicating whether an item is an optional item in the Market Coverage Assortment for the cluster. This measure is calculated by the system on the basis of the Market Coverage thresholds set by the user.
WP MC Assort Core	An editable Boolean measure indicating whether an item is a core item in the Market Coverage Assortment. It can be used to change the core items in a Market Coverage assortment.

**Table 8–31 (Cont.) 1a. Review Market Coverage Assortment Recommendation WP/LP Measure Profile Measures**

<b>Label</b>	<b>Definition</b>
WP MC Assort Optn	An editable Boolean measure indicating whether an item is an optional item in the Market Coverage Assortment. It can be used to change the optional items in a Market Coverage assortment.
MC 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	A Boolean flag measure indicating whether an item is an optional item in last plan's assortment for the cluster.
LP Assort Optn	A Boolean flag measure indicating whether an item is an optional item in last plan's assortment for the cluster.
MC Core Recommended Count	The number of core items in a Market Coverage Assortment per the MC Core Recommended measure.
MC Optn Recommended Count	The number of core items in a Market Coverage Assortment per the MC Optn Recommended measure.
WP MC Assort Core Count	The number of core items in a Market Coverage Assortment per the WP MC Assort Core measure.
WP MC Assort Optn Count	The number of optional items in a Market Coverage Assortment per the WP MC Assort Optn measure.
LP Assort Core Count	The number of optional items in the last plan's assortment for the cluster.
LP Assort Optn Count	The number of optional items in the last plan's assortment for the cluster.
MC Core Recommended Sales R %	Market Coverage provided by core SKUs in the assortment recommended (Market Coverage Assortment).
MC Optn Recommended Sales R %	Market Coverage provided by optional SKUs in the assortment recommended (Market Coverage Assortment).
WP MC Assort Core Coverage Sales R %	Market Coverage provided by the IPI core SKUs in the working plan assortment recommended by the system based on market coverage thresholds set by the user.
WP MC Assort 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 the last plan's assortment.
LP Assort Optn Coverage Sales R %	Market coverage provided by optional SKUs in the last plan's assortment.

**Figure 8–43 1a. Review Market Coverage Assortment Recommendation WP/LY Measure Profile View**

1a. Review Market Coverage Assortment Recommendation						
Location: Mainstream   Large   A (Northwest)						
Find...						
	Coffee	1234582 - Folgers Breakfast Roast Non-Flavored De-Caffeinated 12 oz Can	1234600 - Maxwell House 100% Columbian Non-Flavored De-Caffeinated 12 oz Can	1234615 - Maxwell House Breakfast Roast Non-Flavored De-Caffeinated 12 oz Can	1234747 - Folgers 100% Columbian Non-Flavored Regular - Caffeinated	1234753 - Folgers Dark Roast Non-Flavored Regular - Caffeinated 12 oz Can
LY Market Sales @ Cluster R	33908365.00	171697.81	246261.55	285764.68	257546.09	291885.44
LY Market Sales Rank	1	76	57	46	50	44
WP Sales R	22355744.79	129814.70	0.00	0.00	194721.57	220684.35
WP Mandatory	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MC Core Recommended	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
MC Optn Recommended	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
WP MC Assort Core	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
WP MC Assort Optn	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
MC Core/Optn Error						
LY Assort Core	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
LY Assort Optn	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MC Core Recommended Count	63.00	0.00	0.00	0.00	0.00	1.00
MC Optn Recommended Count	12.00	0.00	1.00	1.00	1.00	0.00
WP MC Assort Core Count	63.00	0.00	0.00	0.00	0.00	1.00
WP MC Assort Optn Count	12.00	0.00	1.00	1.00	1.00	0.00
LY Assort Core Count	61	1	0	0	1	1
LY Assort Optn Count	0	0	0	0	0	0
MC Core Recommended Sales R %	5.66%	0.00%	0.00%	0.00%	0.00%	4.10%
MC Optn Recommended Sales R %	5.66%	0.00%	0.00%	0.00%	3.71%	0.00%
WP MC Assort Core Coverage Sales R %	5.66%	0.00%	0.00%	0.00%	0.00%	4.10%
WP MC Assort Optn Coverage Sales R %	5.66%	0.00%	0.00%	0.00%	3.71%	0.00%
LY Assort Core Coverage Sales R %	38.65%	44.33%	0.00%	0.00%	44.33%	44.33%
LY Assort Optn Coverage Sales R %	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%

Table 8–32 lists the measures available in this view.

**Table 8–32 1a. Review Market Coverage Assortment Recommendation WP/LY Measure Profile Measures**

Label	Definition
LY Market Sales @ Cluster R	Last year's market sales for the cluster. It is typically sourced from third parties providing syndicated data on a quarterly basis.
LY Market Sales Rank	An ordinal rank assigned on the basis of the LY Market Sales R of an item within a product category.
WP Sales R	The working plan assortment's sales retail value.
WP Mandatory	A Boolean flag measure used to mark an item as mandatory in a working plan assortment for the cluster.
MC Core Recommended	A read-only Boolean measure indicating whether an item is a core item per the Market Coverage Assortment for the cluster. This measure is calculated by the system on the basis of the Market Coverage thresholds set by the user.
MC Optn Recommended	A read-only Boolean measure indicating whether an item is an optional item per the Market Coverage Assortment for the cluster. This measure is calculated by the system on the basis of Market Coverage thresholds set by the user.
WP MC Assort Core	An editable Boolean measure indicating whether an item is a core item in the Market Coverage Assortment. It can be used to change the core items in a Market Coverage assortment.

**Table 8–32 (Cont.) 1a. Review Market Coverage Assortment Recommendation WP/LY Measure Profile Measures**

<b>Label</b>	<b>Definition</b>
WP MC Assort Optn	An editable Boolean measure indicating whether an item is an optional item in the Market Coverage Assortment. It can be used to change the optional items in a Market Coverage assortment
MC 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	A Boolean flag measure indicating whether an item is a core item in last year's assortment for the cluster.
LY Assort Optn	A Boolean flag measure indicating whether an item is an optional item in last year's assortment for the cluster.
MC Core Recommended Count	The number of core items in a Market Coverage Assortment per the MC Core Recommended measure.
MC Optn Recommended Count	The number of core items in a Market Coverage Assortment per the MC Optn Recommended measure.
WP MC Assort Core Count	The number of core items in a Market Coverage Assortment per the WP MC Assort Core measure.
WP MC Assort Optn Count	The number of optional items in a Market Coverage Assortment per the WP MC Assort Optn measure.
LY Assort Core Count	The number of core items in last year's assortment.
LY Assort Optn Count	The number of optional items in a last year's assortment.
MC Core Recommended Sales R %	Market Coverage provided by core SKUs in the recommended assortment (Market Coverage Assortment).
MC Optn Recommended Sales R %	Market Coverage provided by optional SKUs in the recommended assortment (Market Coverage Assortment).
WP MC Assort Core Coverage Sales R %	Market Coverage provided by the core SKUs per the Market Coverage Assortment.
WP MC Assort 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.

**1b. 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 8–44 1b. Review Market Coverage DT Details View**

	MC DT Assort Demand Sales Received %	WP MC DT Assort Demand Received Sales U	WP MC DT Assort Demand Received Sales R	WP MC DT Assort Sales U	WP MC DT Assort Sales R
1236214 - Folgers 100%	0.02	866.44	5850.86		
1236856 - Folgers	0.02	762.52	5149.09		
1236847 - Folgers Dark	0.01	698.71	4718.25		
1236808 - Folgers French	0.01	671.29	4533.09		
1236229 - Folgers	0.01	616.67	4164.26		
1236841 - Folgers 100%	0.01	577.85	3902.08		
1236367 - Folgers 100%	0.00	153.17	1034.34		

Table 8–33 lists the measures available in this view.

**Table 8–33 1b. Review Market Coverage DT Details Measures**

Label	Definition
Market Coverage DT Demand Sales Received %	Refers to a percentage of the total sales units of a SKU getting transferred from it and being received by its respective Substitute SKUs in a Market Coverage based working plan assortment for the cluster. It is expressed as a percentage of total sales of the SKU.
WP MC DT Assort Demand Received Sales U	Sales units that would be transferred to a substitute SKU (shown in the RHS hierarchy) from the SKU dropped (shown in the LHS hierarchy) in a Market Coverage Assortment.
WP MC DT Assort Demand Received Sales R	Sales Retail value that would be transferred to a substitute SKU (shown in the RHS hierarchy) from the SKU dropped (shown in the LHS hierarchy) in a Market Coverage Assortment.
WP MC DT Assort Sales U	The Market Coverage assortment's net sales units after applying demand transference manually or through assortment improvement.
WP MC DT Assort Sales R	The Market Coverage assortment's net sales retail value after applying demand transference manually or through assortment improvement.

## 2. Market Coverage Assortment Dashboard View

Use this view to review and compare the alignment of the Market Coverage assortment plan numbers to the set targets in the form of MFP and CP targets at the sub-category level and above:

- Assortment Plan numbers consist of measures presenting the Sales Retail, Sales Units, Gross Profit Retail and Gross Profit %.
- Targets consist of MFP Sales R, MFP Sales U, MFP Gross Profit, and MFP Gross Profit %

**Figure 8–45 2. Market Coverage Assortment Dashboard View**

	Ground	Instant	Single Serve	Whole
MFP Gross Profit %	26%	13%	34%	24%
MFP Sales R	4867161.21	912546.23	1865206.98	2600675.07
WP MC Assort Gross Profit	0.00	0.00	0.00	0.00
WP MC Assort Sales R	0.00	0.00	0.00	0.00
WP MC Assort Core Count	0.00	0.00	0.00	0.00
WP Mandatory Count	0.00	0.00	0.00	0.00
CP Target Gross Profit %	57%	48%	49%	51%
CP Target Sales R	8828499.33	1428536.90	3269807.06	4430315.81
LY Gross Profit %	42%	30%	48%	41%
LY Sales R	6220558.41	1144103.72	2378327.91	3363637.31
LY Assort Core Count	30	6	10	15
WP MC Assort Count var to	-1.00	-1.00	-1.00	-1.00
WP MC Assort Gross Profit	-1.00	-1.00	-1.00	-1.00
WP MC Assort Gross Profit	-1.00	-1.00	-1.00	-1.00
WP MC Assort Gross Profit	-1.00	-1.00	-1.00	-1.00
WP MC Assort Sales var to	-1.00	-1.00	-1.00	-1.00
WP MC Assort Sales var to	-1.00	-1.00	-1.00	-1.00
WP MC Assort Sales var to	-1.00	-1.00	-1.00	-1.00

Table 8–34 lists the measures available in this view.

**Table 8–34 2. Market Coverage Assortment Dashboard View Measures**

Label	Description
MFP Gross Profit %	Merchandise Financial Plan's Gross Profit percentage.
MFP Sales R	Merchandise Financial Plan's Sales Retail value.
WP MC Assort Gross Profit %	Market Coverage assortment's gross profit percentage.
WP MC Assort Sales R	Market Coverage assortment's sales retail value.
WP MC Assort Core Count	The number of core items in the Market Coverage assortment.
WP Mandatory Count	The number of items marked as mandatory.
CP Target Gross Profit %	Approve Category Plan's Gross Profit percentage.
CP Target Sales R	Approve Category Plan's Sales Retail value.
LY Gross Profit %	Last Year's Gross Profit percentage. Similar measures in other versions include: WP Gross Profit % and CP Gross Profit %
LY Sales R	Last Year's Sales Retail value. Similar measures in other versions include: WP Sales R and CP Sales R.
LY Sales U	Last Year's Sales Units. Similar measures in other versions include: WP Sales U and CP Sales U.
LY Assort Core Count	The number of core items in last year's assortment. Similar measures in other versions include: CP Assort Core Count, WP Assort Core Count and LP Assort Core Count.
WP MC Assort Count var to LY	The variance in assortment count between the Market Coverage assortment and last year assortment.
WP MC Assort Gross Profit var to LY R	The variance in gross profit retail between the Market Coverage assortment and last year assortment. Similar measures available with comparison to other planning measures: WP MC Assort Gross Profit var to CP R, WP MC Assort Gross Profit var to MFP R, and WP MC Assort Gross Profit var to Tgt R.
WP MC Assort Sales var to LY R	The variance in sales retail value between the Market Coverage assortment and last year assortment. Similar measures available with variance to other planning measures: WP MC Assort Sales var to CP R, WP MC Assort Sales var to MFP R, and WP MC Assort Sales var to Tgt R.

**Table 8–34 (Cont.) 2. Market Coverage Assortment Dashboard View Measures**

<b>Label</b>	<b>Description</b>
WP MC Assort Sales var to LY U	The variance in sales units between the Market Coverage assortment and last year assortment. Similar measures available with variance to other planning measures: WP MC Assort Sales var to CP U, WP MC Assort Sales var to MFP U, and WP MC Assort Sales var to Tgt U.
WP MC DT Assort Sales var to LY U	The variance between the Market Coverage assortment's demand transference affected sales units and last year assortment's sales retail value. Similar measures available with variation to other plan measures: : WP MC DT Assort Sales var to CP U, WP MC DT Assort Sales var to MFP U, and WP MC DT Assort Sales var to Tgt U.
WP MC DT Assort Sales var to LY R	The variance between the Market Coverage assortment's demand transference affected sales retail value and last year assortment's sales retail value. Similar measures available with variation to other plan measures: WP MC DT Assort Sales var to CP R, WP MC DT Assort Sales var to MFP R, and WP MC DT Assort Sales var to Tgt R.
WP MC DT Assort Gross Profit var to LY R	The variance between the Market Coverage assortment's demand transference affected gross profit retail value and last year assortment's gross profit retail value. Similar measures available with variation to other plan measures: WP MC DT Assort Gross Profit var to CP R, WP MC DT Assort Gross Profit var to MFP R, and WP MC DT Assort Gross Profit var to Tgt R.
WP MC DT Assort Private Label Sales var to LY U	The variance between the private label item's demand transference affected sales units in the Market Coverage assortment and last year assortment. Similar measures available with variance to other planning measures: WP MC Assort Private Label Sales var to CP U and WP MC Assort Private Label Sales var to Tgt U.
WP MC DT Assort Private Label Sales var to LY R	The variance between the private label item's demand transference affected sales retail values in the Market Coverage assortment and last year assortment. Similar measures available with variance to other planning measures: WP MC Assort Private Label Sales var to CP R and WP MC Assort Private Label Sales var to Tgt R.
WP MC DT Assort Private Label Gross Profit var to LY R	The variance between the private label item's demand transference affected gross profit retail values in the Market Coverage assortment and last year assortment. Similar measures available with variance to other planning measures: WP MC Assort Private Label Gross Profit var to CP R and WP MC Assort Private Label Gross Profit var to Tgt R.

## Market Coverage Ordered Incremental Curve Tab

This tab has one view.

### View MC Ordered Incremental Curve View

Use this view to ascertain an optimal assortment range through incremental curve based on Market Coverage ranking by running the Calc MC Incremental Curve custom menu.

Incremental Curves are used to gauge the correctness of assortment range. Incremental sales represent the unique or non-substitutable sales for any item in a given assortment. Incremental Curves provide a visibility to the point where the cumulative incremental sales flatten out in the assortment and there is an overlap of sales between

the SKUs (also referred to as cannibalization of sales). This helps the assortment planner to decide the quantum of substitutable sales that needs to be planned in the case of a stock-out situation of a few SKUs. In effect, they facilitate the derivation of an optimal assortment range.

**Custom Menu**

The Calc MC Incremental Curve custom menu is used to generate an incremental curve based on the market rank ordering for a market coverage assortment, so as to derive an optimal assortment range.

**Figure 8–46 View MC Ordered Incremental Curve View**

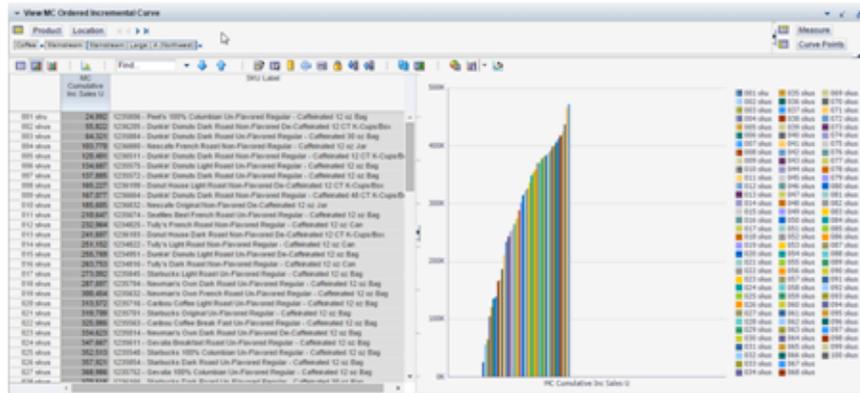


Table 8–35 lists the measures available in this view.

**Table 8–35 View MC Ordered Incremental Curve View Measures**

Label	Description
MC Cumulative Inc Sales U	The cumulative sum of incremental sales units when the incremental curve is calculated using Market Coverage ranking.
SKU Label	Item's label.

**Finalize Assortment for Space Optimization Step**

Use this step to finalize the assortment for space optimization. In this step, assortments are exported to ASO for space optimization. Space optimization aligns the assortment plans to the available space at the stores.

This step has the following tabs and views:

- **Review Final Assortment Recommendation Tab:**
  - 1a. Review Final Assortment Recommendation View
  - 1b. Review DT Details View
  2. Final Assortment Dashboard View
  3. Review Assortment Wedge View
- **Assortment Quantification Summary Tab:**
  - Assortment Quantification Summary View
- **Export to ASO Tab:**
  1. Role Model & Assort Label View

## 2. Export to ASO View

### Custom Menu Options

The following custom menu options are available:

- Seed Assortment
 

This custom menu option is used to seed the core and optional items in the final assortment for space optimization at the category level. The assortment can be seeded by IPI Assortment, Market Coverage Assortment, Last Year (LY), Last Plan (LP), or Current Plan (CP) Assortment. Select the seeding options from a drop-down selection in the WP Seed Core/Optional measure before running this custom menu option.
- Apply DT to Final Assortment
 

This custom menu option is used to apply demand transference to the final assortment. Assortment changes can be done manually by marking or unmarking the core and optional item flags. Before running this custom menu option, the user needs to select a reference assortment which the system uses to calculate the Keep/Add/Drop decisions. This reference assortment is selected in the DT Assort K/A/D measure which has two options in the list, WP/LY and WP/CP assortments.
- Export to ASO @ Cluster
 

This custom menu is used to export assortment plan details and category plan data to ASO for space optimization at the cluster level.
- Export Updated Plans to ASO
 

This custom menu is used to export updated assortment plan numbers to ASO for an already exported assortment plan and the corresponding category plan data.
- Cancel ASO Export
 

This custom menu can only be used to cancel exports to ASO, if the data previously exported has not been consumed by ASO from the HSA RDM due to interface issues or the assortment being in the queue for consumption. This custom menu only deletes the exported data from the RDM.

### Review Final Assortment Recommendation Tab

This tab has four views and four measure profiles:

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

#### 1a. Review Final Assortment Recommendation View

Use this view to review the final system recommended assortment at the cluster level. This view can be used to populate the final assortment for space optimization with an IPI or Market Coverage 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 on IPI or Market Coverage, or use a mix of the two types of recommendations.

**Figure 8–47 1a. Review Final Assortment Recommendation WP/CP Measure Profile View**

	1236193 - Donut House Dark Roast Non-Flavored De-Caffeinated 12 CT K-Cups/Box	1236199 - Donut House Light Roast Non-Flavored De-Caffeinated 12 CT K-Cups/Box	1236205 - Dunkin' Donuts Dark Roast Non-Flavored De-Caffeinated 12 CT K-Cups/Box	1236214 - Folgers 100% Columbian Non-Flavored De-Caffeinated 12 CT K-Cups/Box	1236229 - Folgers Breakfast Roast Non-Flavored De-Caffeinated 12 CT K-Cups/Box
WP Mandatory	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WP IPI Assort Core	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WP IPI Assort Optn	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WP MC Assort Core	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
WP MC Assort Optn	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WP Seed Final Core/Optn	[Dropdown Menu]				
WP Assort Core	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WP Assort Optn	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assort Core/Optn Error	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CP Assort Core	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CP Assort Optn	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WP Final Assort Compare to CP	Keep	Keep	Keep		
WP Assort Core Count	1	1	1	0	0
WP Assort Optn Count	0	0	0	0	0
WP % Contribution of Category Items	0.01	0.01	0.01	0.00	0.00
CP Assort Core Count	1	1	1	0	0
CP Assort Optn Count	0	0	0	0	0
CP % Contribution of Category Items	0.01	0.01	0.01	0.00	0.00
WP Assort Core Coverage Sales R %	0.09	0.09	0.10	0.00	0.00
WP Assort Optn Coverage Sales R %	0.00	0.00	0.00	0.00	0.00
CP Assort Core Coverage Sales R %	8.93%	8.90%	9.78%	0.00%	0.00%
CP Assort Optn Coverage Sales R %	0.00%	0.00%	0.00%	0.00%	0.00%

Table 8–36 lists the measures available in this view.

**Table 8–36 1a. Review Final Assortment Recommendation WP/CP Measure Profile Measures**

Label	Definition
WP Mandatory	A Boolean flag measure used to mark an item as mandatory in a working plan assortment for the cluster.
WP IPI Assort Core	An editable Boolean measure indicating whether an item is a core item in the IPI Assortment. It can be used to change the core items in an assortment.
WP IPI Assort Optn	An editable Boolean measure indicating whether an item is an optional item in the IPI Assortment. It can be used to modify optional items.
WP MC Assort Core	An editable Boolean measure indicating whether an item is a core item in the Market Coverage Assortment. It can be used to change the core items in a Market Coverage assortment.
WP MC Assort Optn	An editable Boolean measure indicating whether an item is an optional item in the Market Coverage Assortment. It can be used to change the optional items in a Market Coverage assortment.
WP Seed Final Core/Optn	Contains a drop-down list of values representing the different methods of generating system-recommended assortments to seed the core and optional items in the working plan assortment. Once the drop-down selection is made, the user needs to run the Seed Core/Optional Recommendation custom menu option. This measure is available at the sub-category level and above.
WP Assort Core	A Boolean flag measure indicating whether an item is a core item in the working plan’s assortment for the cluster.
WP Assort Optn	A Boolean flag measure indicating whether an item is an optional item in the working plan’s assortment for the cluster.
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.
CP Assort Core	A Boolean flag measure indicating whether an item is a core item in the current plan’s assortment for the cluster.
CP Assort Optn	A Boolean flag measure indicating whether an item is an optional item in the current plan assortment for the cluster.

**Table 8–36 (Cont.) 1a. Review Final Assortment Recommendation WP/CP Measure Profile Measures**

Label	Definition
WP Final Assortment Compare to CP	Shows whether an item in the final assortment for the cluster is a Keep, Add, or Drop relative to the current plan assortment.
WP Assort Core Count	The number of core items in a working plan’s assortment for the cluster.
WP Assort Optn Count	The number of optional items in a working plan’s assortment for the cluster.
WP % Contribution of Category Items	The contribution of an item or a product segment (such as, sub-category, CDT product segment, and so on) towards the overall sales of the respective sub-category, category, or a higher product hierarchy level.
CP Assort Core Count	The number of core items in a current plan’s assortment for the cluster.
CP Assort Optn Count	The number of optional items in a current plan assortment for the cluster.
WP Assort Core Coverage Sales R %	Market Coverage provided by the core items in the working plan’s assortment.
WP Assort Optn Coverage Sales R %	Market Coverage provided by the optional SKUs in the working plan’s assortment.
CP Assort Core Coverage Sales R %	Market coverage provided by core SKUs in the current plan assortment.
CP Assort Optn Coverage Sales R %	Market coverage provided by optional SKUs in the current plan assortment.

**Figure 8–48 1a. Review Final Assortment Recommendation WP/DT Measure Profile View 1 Measures**

Measure [ Label ]	1236193 - Donut House Dark Roast Non-Flavored De-Caffeinated 12 CT K-Cups/Box	1236199 - Donut House Light Roast Non-Flavored De-Caffeinated 12 CT K-Cups/Box	1236205 - Dunkin' Donuts Dark Roast Non-Flavored De-Caffeinated 12 CT K-Cups/Box	1236214 - Folgers 100% Columbian Non-Flavored De-Caffeinated 12 CT K-Cups/Box	1236229 - Folgers Breakfast Roast Non-Flavored De-Caffeinated 12 CT K-Cups/Box
WP Mandatory	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WP IPI Assort Core	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WP IPI Assort Optn	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WP MC Assort Core	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
WP MC Assort Optn	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WP Seed Final Core/Optn					
WP Assort Core	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WP Assort Optn	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assort Core/Optn Error					
WP Assort Core Count	1	1	1	0	0
WP Assort Optn Count	0	0	0	0	0
WP % Contribution of Category Items	0.01	0.01	0.01	0.00	0.00
WP Final Assort Compare to LY	Keep	Keep	Keep	Drop	Drop
WP Final Assort Compare to CP	Keep	Keep	Keep		
DT Assort K/A/D Input					
WP Use DT Sales	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Table 8–37 lists the measures available in this view.

**Table 8–37 1a. Review Final Assortment Recommendation WP/DT Measure Profile View 1 Measures**

<b>Label</b>	<b>Definition</b>
WP Mandatory	A Boolean flag measure used to mark an item as mandatory in a working plan assortment for the cluster.
WP IPI Assort Core	An editable Boolean measure indicating whether an item is a core item in the IPI Assortment. It can be used to change the core items in an IPI assortment.
WP IPI Assort Optn	An editable Boolean measure indicating whether an item is an optional item in the IPI Assortment. It can be used to modify optional items in IPI assortment.
WP MC Assort Core	An editable Boolean measure indicating whether an item is a core item in the Market Coverage Assortment. It can be used to change the core items in a Market Coverage assortment.
WP MC Assort Core Optn	An editable Boolean measure indicating whether an item is an optional item in the Market Coverage Assortment. It can be used to change the optional items in a Market Coverage assortment.
WP Seed Final Core/Optn	Contains a drop-down list of values representing the different methods of generating system-recommended assortments to seed the core and optional items in the working plan assortment. Once the drop-down selection is made, the user needs to run the Seed Core/Optional Recommendation custom menu option. This measure is available at the sub-category level and above.
WP Assort Core	A Boolean flag measure indicating whether an item is a core item in the working plan's assortment for the cluster.
WP Assort Optn	A Boolean flag measure indicating whether an item is an optional item in the working plan's assortment for the cluster.
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	The number of core items in a working plan's assortment for the cluster.
WP Assort Optn Count	The number of optional items in a working plan's assortment for the cluster.
WP % Contribution of Category Items	The contribution of an item or a product segment (such as sub-category, CDT product segment, and so on) towards the overall sales of the respective sub-category, category, or a higher product hierarchy level.
WP Final Assort Compare to LY	Shows whether an item in the final assortment for the cluster is a Keep, Add, or Drop relative to last year's assortment.
WP Final Assort Compare to CP	Shows whether an item in the final assortment for the cluster is a Keep, Add, or Drop relative to the current plan assortment.
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 checked, it will populate the WP Assort Sales with DT Sales, otherwise WP Assort Sales will be populated by Sales.

**Figure 8–49 1a. Review Final Assortment Recommendation WP/DT Measure Profile View 2**

Table 8–38 lists the measures available in this view.

**Table 8–38 1a. Review Final Assortment Recommendation WP/DT Measure Profile View 2 Measures**

Label	Definition
WP Assort Sales U	The sales units in the working plan’s assortment for the cluster.
WP Assort Sales R	The sales retail value in the working plan’s assortment for the cluster.
WP DT Assort Sales U	Updated (or DT Affected) Demand Sales Units in the working plan assortment for the cluster. Updated demand sales units compared with baseline demand sales units (WP IPI Assort Sales U) help the user to see the Demand Transference impact on sales units with assortment changes.
WP DT Assort Sales R	Updated (or DT Affected) Demand Sales Retail in the working plan assortment for the cluster. Updated demand sales retail compared with baseline demand sales retail (WP IPI Assort Sales R) helps the user to see the Demand Transference impact on sales retail with assortment changes.
DT No of Significant SKUs	Refers to the count of SKUs which can absorb the significant chunk of substitutable demand of a SKU in a Final Cluster assortment.
WP DT Substitutable Demand Sales U	The sales component of total sales units which represents replaceable sales units (substitutable sales units) of an item/assortment in the working plan assortment for the cluster. In other words, substitutable demand sales units get transferred to substitute items in the working plan assortment for the cluster.
WP DT Substitutable Demand Sales R	The sales component of total sales retail which represents replaceable sales retail (substitutable sales retail) of an item/assortment in the working plan assortment for the cluster.

**Table 8–38 (Cont.) 1a. Review Final Assortment Recommendation WP/DT Measure Profile View 2 Measures**

Label	Definition
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 among the substitute SKUs.
WP DT Assort Incremental Demand Sales U	The sales component of total sales units which represents the irreplaceable sales units of an item/assortment in the working plan assortment for the cluster. In other words, as the name suggests, this quantum of sales is lost and does not get transferred to other items in the assortment.
WP DT Assort Incremental Demand Sales R	The sales component of total sales retail which represents the irreplaceable sales retail of an item/assortment in the working plan assortment for the cluster.
WP Assort Gross Profit %	The gross profit percentage in a working plan’s assortment for the cluster.
WP Assort Gross Profit R	The gross profit retail value in a working plan’s assortment for the cluster. Gross Profit Retail is the difference between Sales Retail and Cost of Goods Sold.
WP DT Assort Gross Profit %	The updated (or DT Affected) demand’s gross profit retail percentage value specifically for the final assortment for the cluster in the working plan. It is compared with the baseline demand’s gross profit retail value (WP Assort Gross Profit R) to see the DT impact on an assortment with assortment changes.
WP DT Assort Gross Profit R	The updated (or DT Affected) demand’s gross profit retail value specifically for the final assortment for the cluster in the working plan. It is compared with the baseline demand’s gross profit retail value (WP Assort Gross Profit R) to see the DT impact on an assortment with assortment changes.

**Figure 8–50 1a. Review Final Assortment Recommendation WP/LP Measure Profile View**

	1236193 - Donut House Dark Roast Non-Flavored De-Caffeinated 12 CT K-Cups/Box	1236199 - Donut House Light Roast Non-Flavored De-Caffeinated 12 CT K-Cups/Box	1236205 - Dunkin' Donuts Dark Roast Non-Flavored De-Caffeinated 12 CT K-Cups/Box	1236214 - Folgers 100% Columbian Non-Flavored De-Caffeinated 12 CT K-Cups/Box	1236229 - Folgers Breakfast Roast Non-Flavored De-Caffeinated 12 CT K-Cups/Box
WP Mandatory	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WP IPI Assort Core	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WP IPI Assort Optn	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WP MC Assort Core	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
WP MC Assort Optn	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WP Seed Final Core/Optn	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WP Assort Core	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WP Assort Optn	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assort Core/Optn Error	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LP Assort Core	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LP Assort Optn	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WP Final Assort Compare to LP	Add	Add	Add		
WP Assort Core Count	1	1	1	0	0
WP Assort Optn Count	0	0	0	0	0
WP % Contribution of Category Items	0.01	0.01	0.01	0.00	0.00
LP Assort Core Count	0	0	0	0	0
LP Assort Optn Count	0	0	0	0	0
LP % Contribution of Category Items	0.00	0.00	0.00	0.00	0.00
WP Assort Core Coverage Sales R %	0.09	0.09	0.10	0.00	0.00
WP Assort Optn Coverage Sales R %	0.00	0.00	0.00	0.00	0.00
LP Assort Core Coverage Sales R %	0.00	0.00	0.00	0.00	0.00
LP Assort Optn Coverage Sales R %	0.00	0.00	0.00	0.00	0.00

Table 8–39 lists the measures available in this view.

**Table 8–39 1a. Review Final Assortment Recommendation WP/LP Measure Profile Measures**

<b>Label</b>	<b>Definition</b>
WP Mandatory	A Boolean flag measure used to mark an item as mandatory in a working plan assortment for the cluster.
WP IPI Assort Core	An editable Boolean measure indicating whether an item is a core item in the IPI Assortment. It can be used to change the core items in an IPI assortment.
WP IPI Assort Optn	An editable Boolean measure indicating whether an item is an optional item in the IPI Assortment. It can be used to modify optional items in an IPI assortment.
WP Market Coverage Core	An editable Boolean flag measure indicating core items per a Market Coverage Assortment.
WP Market Coverage Optn	An editable Boolean flag measure indicating optional items per a Market Coverage Assortment.
WP Seed Final Core/Optn	Contains a drop-down list of values representing the different methods of generating system-recommended assortments to seed the core and optional items in the working plan assortment. Once the drop-down selection is made, the user needs to run the Seed Core/Optional Recommendation custom menu option. This measure is available at the sub-category level and above.
WP Assort Core	A Boolean flag measure indicating whether an item is a core item in the working plan's assortment for the cluster.
WP Assort Optn	A Boolean flag measure indicating whether an item is an optional item in the working plan's assortment for the cluster.
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	A Boolean flag measure indicating whether an item is an optional item in last plan's assortment for the cluster.
LP Assort Optn	A Boolean flag measure indicating whether an item is an optional item in last plan's assortment for the cluster.
WP Final Assortment Compare to CP	Shows whether an item in the final assortment for the cluster is a Keep, Add, or Drop relative to the current plan assortment.
WP Assort Core Count	The number of core items in a working plan's assortment for the cluster.
WP Assort Optn Count	The number of optional items in a working plan's assortment for the cluster.
WP % Contribution of Category Items	The contribution of an item or a product segment (such as, sub-category, CDT product segment, and so on) towards the overall sales of the respective sub-category, category, or a higher product hierarchy level.
LP Assort Core Count	The number of optional items in the last plan's assortment for the cluster.
LP Assort Optn Count	The number of optional items in the last plan's assortment for the cluster.
LP % Contribution of Category Items	Assortment Planning @ Cluster Last Plan % Contribution of Category Items Percent.
WP Assort Core Coverage Sales R %	Market Coverage provided by the core items in the working plan's assortment.
WP Assort Optn Coverage Sales R %	Market Coverage provided by the optional SKUs in the working plan's assortment.

**Table 8–39 (Cont.) 1a. Review Final Assortment Recommendation WP/LP Measure Profile Measures**

Label	Definition
LP Assort Core Coverage Sales R %	Market coverage provided by core SKUs in the last plan's assortment.
LP Assort Optn Coverage Sales R %	Market coverage provided by optional SKUs in the last plan's assortment.

**Figure 8–51 1a. Review Final Assortment Recommendation WP/LY Measure Profile View**

	1236193 - Donut House Dark Roast Non-Flavored De-Caffeinated 12 CT K-Cups/Box	1236199 - Donut House Light Roast Non-Flavored De-Caffeinated 12 CT K-Cups/Box	1236205 - Dunkin' Donuts Dark Roast Non-Flavored De-Caffeinated 12 CT K-Cups/Box	1236214 - Folgers 100% Columbian Non-Flavored De-Caffeinated 12 CT K-Cups/Box	1236229 - Folgers Breakfast Roast Non-Flavored De-Caffeinated 12 CT K-Cups/Box
WP Mandatory	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WP IPI Assort Core	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WP IPI Assort Optn	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WP MC Assort Core	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
WP MC Assort Optn	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WP Seed Final Core/Optn					
WP Assort Core	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WP Assort Optn	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assort Core/Optn Error					
LY Assort Core	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
LY Assort Optn	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WP Final Assort Compare to LY	Keep	Keep	Keep	Drop	Drop
WP Assort Core Count	1	1	1	0	0
WP Assort Optn Count	0	0	0	0	0
WP % Contribution of Category Items	0.01	0.01	0.01	0.00	0.00
LY Assort Core Count	1	1	1	1	1
LY Assort Optn Count	0	0	0	0	0
LY % Contribution of Category Items	0.01	0.01	0.01	0.01	0.01
WP Assort Core Coverage Sales R %	0.09	0.09	0.10	0.00	0.00
WP Assort Optn Coverage Sales R %	0.00	0.00	0.00	0.00	0.00
LY Assort Core Coverage Sales R %	44.33%	44.33%	44.33%	44.33%	44.33%
LY Assort Optn Coverage Sales R %	0.00%	0.00%	0.00%	0.00%	0.00%

Table 8–40 lists the measures available in this view.

**Table 8–40 1a. Review Final Assortment Recommendation WP/LY Measure Profile Measures**

Label	Definition
WP Mandatory	A Boolean flag measure used to mark an item as mandatory in a working plan assortment for the cluster.
WP IPI Assort Core	An editable Boolean measure indicating whether an item is a core item in the IPI Assortment. It can be used to change the core items in an IPI assortment
WP IPI Assort Optn	An editable Boolean measure indicating whether an item is an optional item in the IPI Assortment. It can be used to modify optional items in IPI assortment.
WP MC Assort Core	An editable Boolean measure indicating whether an item is a core item in the Market Coverage Assortment. It can be used to change the core items in a Market Coverage assortment.
WP MC Assort Optn	An editable Boolean measure indicating whether an item is an optional item in the Market Coverage Assortment. It can be used to change the optional items in a Market Coverage assortment.

**Table 8–40 (Cont.) 1a. Review Final Assortment Recommendation WP/LY Measure Profile Measures**

<b>Label</b>	<b>Definition</b>
WP Seed Final Core/Optn	Contains a drop-down list of values representing the different methods of generating system-recommended assortments to seed the core and optional items in the working plan assortment. Once the drop-down selection is made, the user needs to run the Seed Core/Optional Recommendation custom menu option. This measure is available at the sub-category level and above.
WP Assort Core	A Boolean flag measure indicating whether an item is a core item in the working plan's assortment for the cluster.
WP Assort Optn	A Boolean flag measure indicating whether an item is an optional item in the working plan's assortment for the cluster.
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.
LY Assort Core	A Boolean flag measure indicating whether an item is a core item in last year's assortment for the cluster.
LY Assort Optn	A Boolean flag measure indicating whether an item is an optional item in last year's assortment for the cluster.
WP Final Assortment Compare to LY	Shows whether an item in the final assortment for the cluster is a Keep, Add, or Drop relative to last year's assortment.
WP Assort Core Count	The number of core items in a working plan's assortment for the cluster.
WP Assort Optn Count	The number of optional items in a working plan's assortment for the cluster.
WP % Contribution of Category Items	The contribution of an item or a product segment (such as sub-category, CDT product segment, and so on) towards the overall sales of the respective sub-category, category, or a higher product hierarchy level.
LY Assort Core Count	The number of core items in last year's assortment.
LY Assort Optn Count	The number of optional items in last year's assortment.
LY % Contribution of Category Items	Assortment Planning @ Cluster Last Year % Contribution of Category Items Percent.
WP Assort Core Coverage Sales R %	Market Coverage provided by the core items in the working plan's assortment.
WP Assort Optn Coverage Sales R %	Market Coverage provided by the optional 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.

**1b. 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 8–52 1b. Review DT Details View**

Measure [ Label]	DT Assort Demand Sales Received %	WP DT Assort Demand Received Sales U	WP DT Assort Demand Received Sales R	WP DT Assort Sales U	WP DT Assort Sales R
1236199 - Donut House Light Roast Non-Flavored De-Caffeinated 12 CT K-Cups/Box	0.32	19678.20	177249.78		
9876598 PL Granola - Apples N Cinnamon	0.00	0.00	0.00		

Table 8–41 lists the measures available in this view.

**Table 8–41 1b Review DT Details Measures**

Label	Definition
DT Demand Sales Received %	Refers to a percentage of total sales units of a SKU, getting transferred from it and being received by its respective Substitute SKUs in an IC-based assortment. It is expressed as a percentage of total sales of the SKUs.
WP DT Demand Received Sales U	Sales units that would be transferred to the (RHS) SKU from the SKU if it were to be dropped from the assortment. Substitute SKUs are presented in the RHS product hierarchy.
WP DT Demand Received Sales R	Sales retail that would be transferred to the (RHS) SKU from the SKU if it were to be dropped from the assortment. Substitute SKUs are presented in the RHS product hierarchy.
WP DT Assort Sales U	The demand transference affected sales units of a SKU, which is used as a reference in calculating the demand received sales figures for its substitute SKUs in a store assortment. Substitute SKUs are presented in the RHS product hierarchy.
WP DT Assort Sales R	The demand transference affected sales retail value of a SKU, which is used as a reference in calculating the demand received sales figures for its substitute SKUs in a store assortment.

## 2. Final Assortment Dashboard View

Use this view to review and compare the alignment of final assortment plan numbers to the set targets in the form of MFP and CP targets at the sub-category level and above:

- Assortment Plan numbers consist of measures presenting the Sales Retail, Sales Units, Gross Profit Retail, and Gross Profit %.
- Targets consist of MFP Sales R, MFP Sales U, MFP Gross Profit, and MFP Gross Profit %.

**Figure 8–53 2. Final Assortment Dashboard View**

	Ground	Instant	Single Serve	Whole
MFP Gross Profit %	26%	13%	34%	24%
MFP Sales R	4867161.21	912546.23	1865206.98	2600675.07
WP Assort Gross Profit %	31%	32%	27%	29%
WP Assort Sales R	4285840.55	830621.86	1649178.83	2241511.99
WP Assort Core Count	30	6	10	15
WP Mandatory Count	0.00	0.00	0.00	0.00
CP Target Gross Profit %	57%	48%	49%	51%
CP Target Sales R	8828499.33	1428536.90	3269807.06	4430315.81
LY Gross Profit %	42%	30%	48%	41%
LY Sales R	6220558.41	1144103.72	2378327.91	3363637.31
LY Assort Core Count	30	6	10	15
WP Assort Count var to LY	0.00	0.00	0.00	0.00
WP Assort Gross Profit var to	-0.50	-0.24	-0.61	-0.52
WP Assort Gross Profit var to	-0.74	-0.61	-0.73	-0.70
WP Assort Gross Profit var to	0.03	1.30	-0.30	0.05
WP Assort Sales var to LY R	-0.31	-0.27	-0.31	-0.33
WP Assort Sales var to Tgt R	-0.51	-0.42	-0.50	-0.49
WP Assort Sales var to MFP R	-0.12	-0.09	-0.12	-0.14

Table 8–42 lists the measures available in this view.

**Table 8–42 2. Final Assortment Dashboard View Measures**

Label	Description
MFP Gross Profit %	Merchandise Financial Plan's Gross Profit percentage.
MFP Sales R	Merchandise Financial Plan's Sales Retail value.
WP Assort Gross Profit %	Working plan assortment's gross profit percentage.
WP Assort Sales R	Working plan assortment's sales retail value.
WP Assort Core Count	The number of core items in the working plan assortment.
WP Mandatory Count	The number of items marked as mandatory.
CP Target Gross Profit %	Approved Category Plan's Gross Profit percentage.
CP Target Sales R	Approved Category Plan's Sales Retail value.
LY Gross Profit %	Last Year's Gross Profit percentage. Similar measures in other versions include: WP Gross Profit % and CP Gross Profit %.
LY Sales R	Last Year's Sales Retail value. Similar measures in other versions include: WP Sales R and CP Sales R.
LY Sales U	Last Year's Sales Units. Similar measures in other versions include: WP Sales U and CP Sales U.
LY Assort Core Count	The number of core items in last year's assortment. Similar measures in other versions include: CP Assort Core Count, WP Assort Core Count, and LP Assort Core Count.
WP Assort Gross Profit var to LY R	The variance in gross profit retail between the working plan assortment and last year assortment. Similar measures available with comparison to other planning measures: WP Assort Gross Profit var to CP R, WP Assort Gross Profit var to MFP R, and WP Assort Gross Profit var to Tgt R.
WP Assort Sales var to LY R	The variance in sales retail value between the working plan assortment and last year assortment. Similar measures available with variance to other planning measures: WP Assort Sales var to CP R, WP Assort Sales var to MFP R, and WP Assort Sales var to Tgt R.

**Table 8–42 (Cont.) 2. Final Assortment Dashboard View Measures**

Label	Description
WP Assort Sales var to LY U	The variance in sales units between the working plan assortment and last year assortment. Similar measures available with variance to other planning measures: WP Assort Sales var to CP U, WP Assort Sales var to MFP U, and WP Assort Sales var to Tgt U.
WP DT Assort Sales var to LY U	The variance between the working plan assortment's demand transference affected sales units and last year assortment's sales units. Similar measures available with variation to other plan measures: WP DT Assort Sales var to CP U, WP DT Assort Sales var to MFP U, and WP DT Assort Sales var to Tgt U.
WP DT Assort Sales var to LY R	The variance between the working plan assortment's demand transference affected sales retail value and last year assortment's sales retail value. Similar measures available with variation to other plan measures: WP DT Assort Sales var to CP R, WP DT Assort Sales var to MFP R, and WP DT Assort Sales var to Tgt R.
WP DT Assort Gross Profit var to LY R	The variance between the IPI assortment's demand transference affected sales retail value and last year assortment's sales retail value. Similar measures available with variation to other plan measures: WP IPI DT Assort Gross Profit var to CP R, WP IPI DT Assort Gross Profit var to MFP R, and WP IPI DT Assort Gross Profit var to Tgt R.

### 3. Review Assortment Wedge View

Use this view to review and compare the assortments across different clusters under a trading area. It facilitates quick viewing and comparison of the product mix of assortments across various clusters.

**Figure 8–54 3. Review Assortment Wedge View**

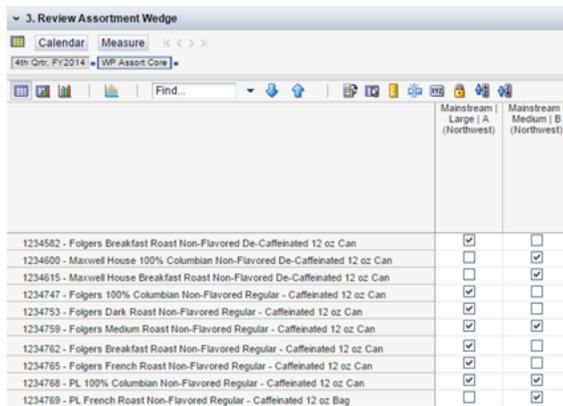


Table 8–43 lists the measures available in this view.

**Table 8–43 3. Review Assortment Wedge View Measures**

Label	Description
WP Assort Core	A Boolean flag measure indicating whether an item is a core item in the working plan's assortment for the cluster. Similar measures in other versions include: CP Assort Core, LY Assort Core, and LP Assort Core.

**Table 8–43 (Cont.) 3. Review Assortment Wedge View Measures**

<b>Label</b>	<b>Description</b>
WP Mandatory	A Boolean flag measure used to mark an item as mandatory in the working plan assortment for the cluster. Similar measures in other versions include: CP Mandatory, LP Mandatory, and LY Mandatory.
WP Assort Carried	A Boolean flag measure indicating if an item is part of the working plan assortment. Similar measures in other versions include: CP Assort Carried, LP Assort Carried, and LY Assort Carried.
WP Assort Optn	A Boolean flag measure indicating whether an item is an optional item in the working plan assortment or the cluster. Similar measures in other version include: CP Assort Optn, LY Assort Optn, and LP Assort Optn.
WP IPI Assort Core	A Boolean flag measure indicating whether an item is a core item in the IPI assortment for the cluster. Similar measures in other versions include: CP IPI Assort Core, LY IPI Assort Core, and LP IPI Assort Core.
WP IPI Assort Optn	A Boolean flag measure indicating whether an item is an optional item in the IPI assortment for the cluster. Similar measures in other versions include: CP IPI Assort Optn, LY IPI Assort Optn, and LP IPI Assort Optn.
WP MC Assort Core	A Boolean flag measure indicating whether an item is a core item in the Market Coverage assortment for the cluster. Similar measures in other versions include: CP MC Assort Core, LY MC Assort Core, and LP MC Assort Core.
WP MC Assort Optn	A Boolean flag measure indicating whether an item is an optional item in the Market Coverage assortment for the cluster. Similar measures in other versions include: CP MC Assort Optn, LY MC Assort Optn, and LP MC Assort Optn.
WP Assort Sales R	The working plan assortment's sales retail value. Similar measures in other version include: CP Assort Sales R and LY Assort Sales R.
WP Assort Sales U	The working plan assortment's sales units. Similar measures in other version include: CP Assort Sales U and LY Assort Sales U.
WP Avg Inv R	The working plan assortment's average inventory retail value.
WP DT Assort Sales R	The working plan assortment's demand transference affected sales retail value.
WP DT Assort Sales U	The working plan assortment's demand transference affected sales units.
MFP Sales R	Merchandise Financial Plan's Sales Retail value.
MFP Sales U	Merchandise Financial Plan's Sales Units.
CP Target Sales R	Approved Category Plan's target sales retail value.
CP Target Sales U	Approved Category Plan's target sales units.
WP AS Combined Assort Sales R	The combined sales retail value in the working plan assortment at the cluster level, taking into consideration both store level (ASWP) and cluster level (ACWP) measures. Similar measures in other versions include: LY AS Combined Assort Sales R and CP AS Combined Assort Sales R.

**Table 8–43 (Cont.) 3. Review Assortment Wedge View Measures**

Label	Description
WP AS Combined Assort Sales U	The combined sales units in the working plan assortment at the cluster level, taking into consideration both store level (ASWP) and cluster level (ACWP) measures. Similar measures in other versions include: LY AS Combined Assort Sales U and CP AS Combined Assort Sales U.

## 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 such as 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 8–55 Assortment Quantification Summary WP/CP Measure Profile View**

	Ground	Instant	Single Serve	Whole
WP Assort Sales R	641.3 K	190.6 K	0.0 K	467.6 K
WP Assort Sales U	64,331	27,739	0	36,667
WP Assort Sales AUR	9.97	6.87	0.00	12.68
WP Assort Gross Profit R	0.0 K	0.0 K	0.0 K	0.0 K
WP Assort Gross Profit %	0.0 %	0.0 %	0.0 %	0.0 %
CP Assort Sales R	0.0 K	0.0 K	0.0 K	0.0 K
CP Assort Sales U	0	0	0	0
CP Assort Sales AUR	0.00	0.00	0.00	0.00
CP Assort Gross Profit R	0.0 K	0.0 K	0.0 K	0.0 K
CP Assort Gross Profit %	0.0 %	0.0 %	0.0 %	0.0 %
WP Assort Sales var to CPR	0.0 %	0.0 %	0.0 %	0.0 %
WP Assort Sales var to CPU	0.0 %	0.0 %	0.0 %	0.0 %
WP Assort Gross Profit var to CPR	0.0 %	0.0 %	0.0 %	0.0 %
CP AS Combined Assort Sales R	0.0 K	0.0 K	0.0 K	0.0 K
CP AS Combined Assort Sales U	0	0	0	0
CP AS Combined Assort Sales AUR	0.00	0.00	0.00	0.00
CP AS Combined Assort Gross Profit R	0.0 K	0.0 K	0.0 K	0.0 K
CP AS Combined Assort Gross Profit %	0.0 %	0.0 %	0.0 %	0.0 %

Table 8–44 lists the measures available in this view.

**Table 8–44 Assortment Quantification Summary WP/CP Measure Profile Measures**

Label	Definition
WP Assort Sales R	The sales retail value in the working plan’s assortment for the cluster.
WP Assort Sales U	The sales units in the working plan’s assortment for the cluster.
WP Assort Sales AUR	The average unit retail value of a SKU in a working plan assortment at the cluster level. It reflects the average selling price of a SKU at a specific product hierarchy level.
WP Assort Gross Profit R	The gross profit retail value in a working plan’s assortment for the cluster. Gross Profit Retail is the difference between Sales Retail and Cost of Goods Sold.

**Table 8–44 (Cont.) Assortment Quantification Summary WP/CP Measure Profile**

<b>Label</b>	<b>Definition</b>
WP Assort Gross Profit %	The gross profit percentage in a working plan's assortment for the cluster.
CP Assort Sales R	The sales retail value in the current plan assortment for the cluster.
CP Assort Sales U	The sales units in the current plan assortment for the cluster.
CP Assort Sales AUR	Average unit retail value of a SKU in a current plan assortment at the cluster level. It reflects the average selling price of a SKU at a specific product hierarchy level.
CP Assort Gross Profit R	The gross profit retail value in a current plan assortment for the cluster. Gross Profit Retail is the difference between Sales Retail and Cost of Goods Sold.
CP Assort Gross Profit %	The gross profit percentage in the current plan assortment for the cluster.
WP Assort Sales var to CP R	The working plan assortment's sales retail value's variance to the same in the current plan.
WP Assort Sales var to CP U	The working plan assortment's sales units variance to the same in the current plan.
WP Assort Gross Profit var to CP R	The working plan assortment's gross profit value's variance to the same in the current plan.
CP AS Combined Assort Sales R	Effective (or combined) sales retail value in the current plan assortment for the cluster, taking into consideration any store level overrides to the assortment plan in the Assortment Planning @ Store task.
CP AS Combined Assort Sales U	Effective (or combined) sales units in the current plan assortment for the cluster, taking into consideration any store level overrides to the assortment plan in the Assortment Planning @ Store task.
CP AS Combined Assort Sales AUR	Effective (or combined) average unit retail in the current plan assortment for the cluster, taking into consideration any store level overrides to the assortment plan in the Assortment Planning @ Store task.
CP AS Combined Assort Gross Profit R	Effective (or combined) gross profit retail value in the current plan assortment for the cluster, taking into consideration any store level overrides to the assortment plan in the Assortment Planning @ Store task.
CP AS Combined Assort Gross Profit %	Effective (or combined) gross profit percentage in the current plan assortment for the cluster, taking into consideration any store level overrides to the assortment plan (in the Assortment Planning @ Store task).

**Figure 8–56 Assortment Quantification Summary WP/LY Measure Profile View**

	Ground	Instant	Single Serve	Whole
LY Assort Sales R	0.0 K	0.0 K	0.0 K	0.0 K
LY Assort Sales U	0	0	0	0
LY Assort Sales AUR	0.00	0.00	0.00	0.00
LY Gross Profit R	1,816.8 K	235.5 K	797.3 K	959.5 K
LY Gross Profit %	42.5 %	30.3 %	48.1 %	41.3 %
WP Assort Sales R	641.3 K	190.6 K	0.0 K	467.6 K
WP Assort Sales U	64,331	27,739	0	36,867
WP Assort Sales AUR	9.97	6.87	0.00	12.68
WP Assort Gross Profit R	0.0 K	0.0 K	0.0 K	0.0 K
WP Assort Gross Profit %	0.0 %	0.0 %	0.0 %	0.0 %
WP Assort Sales var to LY R	0.0 %	0.0 %	0.0 %	0.0 %
WP Assort Sales var to LY U	0.0 %	0.0 %	0.0 %	0.0 %
WP Assort Gross Profit var to LY R	0.0 %	0.0 %	0.0 %	0.0 %
WP AS Combined Assort Sales R	1,551.9 K	386.3 K	0.0 K	1,064.6 K
WP AS Combined Assort Sales U	141,003	56,231	0	84,136
WP AS Combined Assort Sales AUR	11.01	6.87	0.00	12.65
WP AS Combined Assort Gross Profit R	0.0 K	0.0 K	0.0 K	0.0 K
WP AS Combined Assort Gross Profit %	0.0 %	0.0 %	0.0 %	0.0 %

Table 8–45 lists the measures available in this view.

**Table 8–45 Assortment Quantification Summary WP/LY Measure Profile Measures**

Label	Definition
LY Gross Profit R	Last Year Gross Profit Retail.
LY Gross Profit %	Last Year Gross Profit Percent.
WP Assort Sales R	The sales retail value in the working plan’s assortment for the cluster.
WP Assort Sales U	The sales units in the working plan’s assortment for the cluster.
WP Assort Sales AUR	The average unit retail value of a SKU in a working plan assortment at the cluster level. It reflects the average selling price of a SKU at a specific product hierarchy level.
WP Assort Gross Profit R	The gross profit retail value in a working plan’s assortment for the cluster. Gross Profit Retail is the difference between Sales Retail and Cost of Goods Sold.
WP Assort Gross Profit %	The gross profit percentage in a working plan’s assortment for the cluster.
WP Assort Sales var to LY R	The working plan assortment's sales retail value's variance to the same in last year's actuals.
WP Assort Sales var to LY U	The working plan assortment's sales units variance to the same in last year's actuals.
WP Assort Gross Profit var to LY R	The working plan assortment's gross profit value's variance to the same in last year's actuals.
WP AS Combined Assort Sales R	The effective (or combined) sales retail value in the working plan assortment for the cluster, taking into consideration any store level overrides in the Assortment Plan @ Store task.
WP AS Combined Assort Sales U	The effective (or combined) sales units in the working plan assortment for the cluster, taking into consideration any store level overrides in the Assortment Plan @ Store task.

**Table 8–45 (Cont.) Assortment Quantification Summary WP/LY Measure Profile**

Label	Definition
WP AS Combined Assort Sales AUR	The effective (or combined) average unit retail value in the working plan assortment for the cluster, taking into consideration any store level overrides in the Assortment Plan @ Store task.
WP AS Combined Assort Gross Profit R	The effective (or combined) gross profit retail value in the working plan assortment for the cluster, taking into consideration any store level overrides in the Assortment Plan @ Store task.
WP AS Combined Assort Gross Profit %	The effective (or combined) gross profit percentage in the working plan assortment for the cluster, taking into consideration any store level overrides in the Assortment Plan @ Store task.

**Figure 8–57 Assortment Quantification Summary WP/Tgt Measure Profile View**

	Ground	Instant	Single Serve	Whole
Target Sales R				
Target Sales U				
Target Sales AUR				
Target Gross Profit R				
Target Gross Profit %				
WP Assort Sales R	641.3 K	190.6 K	0.0 K	467.6 K
WP Assort Sales U	64,331	27,739	0	36,867
WP Assort Sales AUR	9.97	6.87	0.00	12.68
WP Assort Gross Profit R	0.0 K	0.0 K	0.0 K	0.0 K
WP Assort Gross Profit %	0.0 %	0.0 %	0.0 %	0.0 %
WP Assort Sales var to Tgt R	-98.7 %	-98.1 %	-100.0 %	-97.8 %
WP Assort Sales var to Tgt U	-98.6 %	-98.1 %	-100.0 %	-97.9 %
WP Assort Gross Profit var to Tgt R	-100.0 %	-100.0 %	-100.0 %	-100.0 %
WP AS Combined Assort Sales R	1,551.9 K	386.3 K	0.0 K	1,064.6 K
WP AS Combined Assort Sales U	141,003	56,231	0	84,136
WP AS Combined Assort Sales AUR	11.01	6.87	0.00	12.65
WP AS Combined Assort Gross Profit R	0.0 K	0.0 K	0.0 K	0.0 K
WP AS Combined Assort Gross Profit %	0.0 %	0.0 %	0.0 %	0.0 %

Table 8–46 lists the measures available in this view.

**Table 8–46 Assortment Quantification Summary WP/Tgt Measure Profile Measures**

Label	Definition
Target Sales R	Target Sales Retail from the Category Plan.
Target Sales U	Target Sales Units from the Category Plan.
Target Sales AUR	Target Sales Average Unit Retail from the Category Plan.
Target Gross Profit R	Target Gross Profit Retail from the Category Plan.
Target Gross Profit %	Target Gross Profit Percent from the Category Plan.
WP Assort Sales R	The sales retail value in the working plan’s assortment for the cluster.
WP Assort Sales U	The sales units in the working plan’s assortment for the cluster.

**Table 8–46 (Cont.) Assortment Quantification Summary WP/Tgt Measure Profile**

<b>Label</b>	<b>Definition</b>
WP Assort Sales AUR	The average unit retail value of a SKU in a working plan assortment at the cluster level. It reflects the average selling price of a SKU at a specific product hierarchy level.
WP Assort Gross Profit R	The gross profit retail value in a working plan's assortment for the cluster. Gross Profit Retail is the difference between Sales Retail and Cost of Goods Sold.
WP Assort Gross Profit %	The gross profit percentage in a working plan's assortment for the cluster.
WP Assort Sales var to Tgt R	The working plan assortment's sales retail value's variance to the same in the target plan (approved category plan).
WP Assort Sales var to Tgt U	The working plan assortment's sales units variance to the same in the target plan (approved category plan).
WP Assort Gross Profit var to Tgt R	The working plan assortment's gross profit value's variance to the same in the target plan (approved category plan).
WP AS Combined Assort Sales R	The effective (or combined) sales retail value in the working plan assortment for the cluster, taking into consideration any store level overrides in the Assortment Plan @ Store task.
WP AS Combined Assort Sales U	The effective (or combined) sales units in the working plan assortment for the cluster, taking into consideration any store level overrides in the Assortment Plan @ Store task.
WP AS Combined Assort Sales AUR	The effective (or combined) average unit retail value in the working plan assortment for the cluster, taking into consideration any store level overrides in the Assortment Plan @ Store task.
WP AS Combined Assort Gross Profit R	The effective (or combined) gross profit retail value in the working plan assortment for the cluster, taking into consideration any store level overrides in the Assortment Plan @ Store task.
WP AS Combined Assort Gross Profit %	The effective (or combined) gross profit percentage in the working plan assortment for the cluster, taking into consideration any store level overrides in the Assortment Plan @ Store task.

## Export to ASO Tab

This tab has two views to fulfill the requirements of exporting assortment plan and category plan data to the Assortment and Space Optimization (ASO) solution.

Exported assortment plans are optimized in ASO to the available space and recommendations are sent back to RCM.

RPAS-based Hybrid Storage Architecture (HSA) is used to provide a near real-time round-trip integration between RCM and ASO. The Oracle Database schema, RPAS Data Mart (RDM), is used to store data being exchanged between RCM and ASO.

Note, if there is an active export existing for a category, new exports cannot be made to ASO.

Import from ASO into RCM is done in the next step, Import and Review ASO Results.

### 1. Role Model & Assort Label View

Use this view to select the role assignment model for categories that need to be exported to ASO at the cluster level.

**Figure 8–58 1. Role Model & Assort Label View**

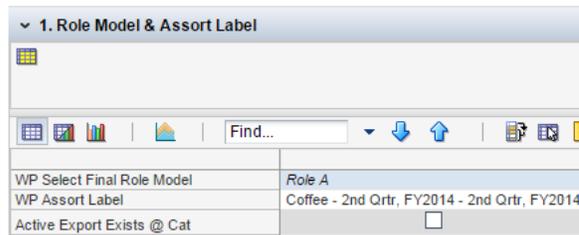


Table 8–47 lists the measures available in this view.

**Table 8–47 1. Role Model & Assort Label Measures**

Label	Definition
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 role assignment to categories, Model A and Model B.
WP Assort Label	The system-generated label (based on trading area, category, or consumer segment) displayed for a working plan assortment being exported for assortment space optimization. This assortment label can also be user-defined.
Active Export Exists @Cat	This read-only Boolean measure indicates if there are any active exports present for the category, where the ASO results are expected back. ASO can accept only one export for a category at a time. If this Boolean measure is checked, the system will not allow an export from RCM to ASO.

## 2. Export to ASO View

Use this view to select the clusters for which assortment plan and category plan data needs to be exported to ASO for space optimization. Check the WP Export to ASO flag measure for the clusters and run the Export to ASO @Cluster custom menu.

**Figure 8–59 2. Export to ASO View**

Table 8–48 lists the measures available in this view.

**Table 8–48 2. Export to ASO Measures**

<b>Label</b>	<b>Definition</b>
WP Export to ASO	A Boolean flag measure, at the cluster level, which needs to be checked before running the Export to ASO @Cluster custom menu.
ASO Export Status	This read-only measure is used to display the status of exports to ASO.
Last Exported Ver	Assortment plans exported for space optimization are identified by the assortment set and corresponding version. Assortment set is a sequential system-generated number assigned to an assortment plan exported for a specific product category, trading areas, and quarters. Assortment Set Version is a sequential system-generated number, representing the number of exports against a specific assortment set. Last Exported version is a system-generated number for an assortment set, used to identify the last assortment plan exported for space optimization.
Active Exports Exists	This system-generated Boolean flag measure is used to identify the presence of any active exports for assortment space optimization for a product category, clusters under trading areas, and quarters for which the optimization results are yet to be imported.
Last Exported Date	The date on which an assortment plan was exported for assortment space optimization for the given trading areas, quarters, and product category.
WP Export Updated Plan	This Boolean flag measure is used to export updated or changed assortment plan numbers for an already exported assortment plan for space optimization at the category level. The Export Updated Plans to ASO custom menu is used to do the export after checking this flag measure.
ASO Results Imported	This Boolean flag measure is used to indicate the import of assortment space optimization results for a specific cluster and product category at least once. This measure remains checked if the imports have happened at least once.
ASO Results Accepted	This system-generated Boolean flag measure is used to indicate if the assortment space optimization results have been accepted at least once for a cluster and product category.

**Custom Menus**

Export to ASO @Cluster: This custom menu is used to export assortment plan details and category plan data to ASO for space optimization at the cluster level.

Export Updated Plans to ASO: This custom menu is used to export updated assortment plan numbers to ASO for an already exported assortment plan and corresponding category plan data.

Cancel ASO Export: This custom menu can only be used to cancel exports to ASO, if the data previously exported has not been consumed by ASO from the HSA RDM due to interface issues or the assortment being in the queue for consumption. This custom menu only deletes the exported data from the RDM.

**Import and Review ASO Results Step**

The process of space optimization of an assortment at the cluster level, through integration with ASO, consists of the following actions:

1. Export the cluster level assortment with a space optimization request.

2. Import the ASO results after assortment space optimization in ASO.
3. Review and compare the ASO results with the exported assortment and other versions of the assortment such as, LY, CP, and LP.
4. Accept the ASO results and review the space-optimized assortment.
5. Formalize the placeholder items in the assortment.
6. Approve the space-optimized assortment and finalize it for implementations.

Use this step to review and import ASO results, location-wise or space-wise, and compare them against the exported assortment plan and other versions of the assortment plan.

The previously exported assortment plan is space optimized in ASO and then the ASO recommended assortment, assortment plan, and space productivity information are exported back to RCM. Once the exports are available from ASO, a custom menu is run to import the available ASO results.

Space productivity information is comprised of parameters, such as average service levels, stock cover in number of days, allocated space (number of facings, facings length), and so on.

**Prior to starting this step:**

- The assortment plan should have been exported to ASO with a space optimization request.
- Space optimization for the exported assortment plan should be complete in ASO and the ASO results should have been exported back to RCM.

**After completing this step:**

If ASO results are meeting the expectations, proceed to the next step, Accept and Approve ASO Results.

This step has the following tabs and views:

- [Import and Review ASO Results Tab](#):
  1. [Import ASO Results View](#)
  2. [ASO Assortment Summary View](#)
  3. [ASO Assortment Details and Space Productivity View](#)
- [Import and Review ASO Results Tab](#):
  1. [ASO Assortment by Location View](#)
  2. [ASO Assortment by Space View](#)

## Custom Menu Option

This step has one custom menu option.

### Import ASO Results

This custom menu is used to import ASO results consisting of recommended assortment, assortment plan, and space productivity information.

## Import and Review ASO Results Tab

This tab has three views.

## 1. Import ASO Results View

Use this view to import assortment space optimization results from ASO. Check the WP ASO Import flag measures at the all locations level and run the Import ASO Results custom menu. This imports all the available and relevant space optimization results from ASO. Relevant optimization results consist of clusters where active exports for assortment space optimization exist. The WP ASO Import flag measure is reset once the imports are completed successfully and the corresponding positions for the ASO Import Status flag measure are updated.

**Figure 8–60 1. Import ASO Results View**

Location	Assort Label	Last Exported Ver	Active Export Exists	Last Exported Date	WP ASO Import	ASO Import Status	ASO Results Imported	ASO Results Imported Date	ASO Results Accepted
all [Location]	Coffee - 4th Qtr, FY2014 - 4th Qtr, FY2014	1	<input type="checkbox"/>	02/01/2014	<input checked="" type="checkbox"/>	?	<input type="checkbox"/>	02/01/2014	<input type="checkbox"/>
Northwest	Coffee - 4th Qtr, FY2014 - 4th Qtr, FY2014	1	<input type="checkbox"/>	02/01/2014	<input type="checkbox"/>	?	<input type="checkbox"/>	02/01/2014	<input type="checkbox"/>
Mainstream	Coffee - 4th Qtr, FY2014 - 4th Qtr, FY2014	1	<input type="checkbox"/>	02/01/2014	<input type="checkbox"/>	ASO Data ...	<input checked="" type="checkbox"/>	02/01/2014	<input type="checkbox"/>
Mainstream		0	<input type="checkbox"/>				<input type="checkbox"/>		<input type="checkbox"/>
Mainstream		0	<input type="checkbox"/>				<input type="checkbox"/>		<input type="checkbox"/>
Mainstream		0	<input type="checkbox"/>				<input type="checkbox"/>		<input type="checkbox"/>
Mainstream		0	<input type="checkbox"/>				<input type="checkbox"/>		<input type="checkbox"/>
Premium   Large		0	<input type="checkbox"/>				<input type="checkbox"/>		<input type="checkbox"/>
Premium		0	<input type="checkbox"/>				<input type="checkbox"/>		<input type="checkbox"/>
Premium   Small		0	<input type="checkbox"/>				<input type="checkbox"/>		<input type="checkbox"/>
Premium   Small		0	<input type="checkbox"/>				<input type="checkbox"/>		<input type="checkbox"/>
Premium   Small		0	<input type="checkbox"/>				<input type="checkbox"/>		<input type="checkbox"/>
Value   Large   A		0	<input type="checkbox"/>				<input type="checkbox"/>		<input type="checkbox"/>
Value   Medium		0	<input type="checkbox"/>				<input type="checkbox"/>		<input type="checkbox"/>
Value   Small   C		0	<input type="checkbox"/>				<input type="checkbox"/>		<input type="checkbox"/>
Value   Small   E		0	<input type="checkbox"/>				<input type="checkbox"/>		<input type="checkbox"/>

Table 8–49 lists the measures available in this view.

**Table 8–49 1. Import ASO Results View Measures**

Label	Description
Assort Label	The system-generated label displayed for a working plan assortment which was last exported for assortment space optimization. It can be changed to a custom, user-entered assortment label.
Last Exported Ver	Assortment plans exported for space optimization are identified by the assortment set and corresponding version. Assortment set is a sequential system-generated number assigned to an assortment plan exported for a specific product category, trading areas and quarters. Assortment Set Version is a sequential system generated number, representing the number of exports against a specific assortment set. Last Exported version is a system-generated number for an assortment set, used to identify the last assortment plan exported for space optimization.
Active Export Exists	This system-generated Boolean flag measure is used to identify the presence of any active exports for assortment space optimization for a product category, clusters under trading areas, or quarters for which the optimization results are yet to be imported. This measure is reset to False once the ASO results are successfully imported.
Last Exported Date	The date on which an assortment plan was exported for assortment space optimization for the given trading areas, quarters, and product category.
WP ASO Import	This user-entered Boolean/flag measure is used to trigger the import of assortment space optimization results. This measure can be checked at the all locations level to import all the relevant (where active exports exist) and available optimization results for the workbook. Once the import is completed, this flag measure is reset.

**Table 8–49 (Cont.) 1. Import ASO Results View Measures**

<b>Label</b>	<b>Description</b>
ASO Import Status	This system-generated measure is used to indicate the successful import of assortment space optimization results for a specific cluster and product category. It is also used to present a warning message in case of the removal of a mandatory item in the space optimization results.
ASO Results Imported	This Boolean/flag measure is used to indicate the import of assortment space optimization results for a specific cluster and product category at least once. This measure remains checked, if the imports have happened at least once.
ASO Results Imported Date	The date on which the assortment space optimization results were imported.
ASO Results Accepted	This system-generated Boolean/flag measure is used to indicate, if the assortment space optimization results have been accepted at least once for a cluster and a product category.
Exported to ASO	This system-generated Boolean flag measure is used to indicate the successful export of assortment plans for space optimization at least once. It is not reset on successful import of optimization results.
Assort Set	Assortment plans exported for space optimization are identified by the assortment set and corresponding version. Assortment set is a sequential system-generated number assigned to an assortment plan exported for a specific category, trading areas, and quarters. On Assortment Finalization for implementation, the assortment set number is incremented by one for the clusters under the same trading areas. After an assortment is finalized for implementation, if more exports for space optimization are done to ASO, the Assort Set number is incremented by 1. It is also incremented by 1, in the case of cancellation of exported assortments.
ASO Results Accepted By	The user who has accepted the assortment space optimization results.
ASO Results Accepted Date	The date on which the assortment space optimization results were accepted.
Last Exported By	The user who last exported an assortment plan for space optimization.
Last Exported ID	The system-generated Assortment ID for an exported assortment plan for space optimization. It is a concatenation of the internal product category ID, quarter, and year for an assortment set.
ASO Results Imported By	The user who last imported assortment space optimization results.

**Custom Menu**

Use the Import ASO Results custom menu in this view to import the space optimization results from ASO. The WP ASO Import measure needs to be checked at the all locations level to run this custom menu.

**2. ASO Assortment Summary View**

Use this view to review and compare the summary of ASO recommended results with the exported working plan (WP), assortment plan for space optimization, current plan, and last year assortment plan at the cluster level.

The ASO recommended assortment plan is available at the SKU/Store level only. Several SKU count measures are used to present SKU/Store level information at the cluster level.

**Figure 8–61 2. ASO Assortment Summary View**

Measure [Label]	Ground	Instant	Single Serve	Whole
WP Mandatory Count	0.00	0.00	0.00	0.00
WP Assort Core Count	20	10	4	5
WP Assort Optn Count	0	0	0	0
WP Assort Sales U	728318.59	309698.06	168587.87	206862.64
WP Assort Sales R	6269429.83	2720768.94	1158259.26	1895747.66
WP Assort Gross Profit R	2047112.69	799294.61	298694.62	784039.05
WP Assort Gross Profit %	0.33	0.29	0.26	0.41
ASO Assort Core Distinct Count	20	10	4	5
ASO Assort Core Max Count	20	10	4	5
ASO Assort Core Min Count	20	10	4	5
ASO Assort Sales U	300811.80	153599.36	32849.08	103413.34
ASO Assort Sales R	2569231.00	1270366.34	225685.94	947709.79
ASO Assort Gross Profit R	1012292.15	436974.06	89021.77	456878.76
ASO Assort Gross Profit %	0.39	0.34	0.31	0.48
LY Mandatory Count	0.00	0.00	0.00	0.00
LY Assort Core Count	61	30	6	10
LY Assort Optn Count	0	0	0	0
LY Assort Sales U	1155111.51	499338.86	166527.59	220151.08
LY Assort Sales R	13106627.34	6220558.41	1144103.72	2378327.91
LY Assort Gross Profit R	5517883.57	2639142.52	346436.58	1142580.42
LY Assort Gross Profit %	0.42	0.42	0.30	0.48
LY AS Combined Assort Core Distinct Count	61	30	6	10
LY AS Combined Assort Core Max Count	61	30	6	10
LY AS Combined Assort Core Min Count	61	30	6	10
LY AS Combined Assort Sales U	1155111.51	499338.86	166527.59	220151.08
LY AS Combined Assort Sales R	13106627.34	6220558.41	1144103.72	2378327.91
LY AS Combined Assort Gross Profit R	5517883.57	2639142.52	346436.58	1142580.42
LY AS Combined Assort Gross Profit %	0.42	0.42	0.30	0.48

Table 8–50 lists the measures available in this view.

**Table 8–50 2. ASO Assortment Summary View Measures**

Label	Description
WP Mandatory Count	The number of mandatory items in a working plan assortment for the cluster. Similar measures in other versions include: LY Mandatory Count, CP Mandatory Count, and LP Mandatory Count.
WP Assort Core Count	The number of core items in a working plan assortment for the cluster level. Similar measures in other versions include: LY Assort Core Count, CP Assort Core Count, and LP Assort Core Count.
WP Assort Optn Count	The number of optional items in a working plan assortment at the cluster level. Similar measures in other versions include: LY Assort Optn Count, CP Assort Optn Count, and LP Assort Optn Count.
WP Assort Sales U	The sales units in the working plan's assortment for the cluster. Similar measures in other versions include: LY Assort Sales U and CP Assort Sales U.
WP Assort Sales R	The sales retail value in the working plan's assortment for the cluster. Similar measure in other versions: LY Assort Sales R and CP Assort Sales R.
WP Assort Gross Profit R	The gross profit retail value in a working plan's assortment for the cluster. Gross Profit Retail is the difference between Sales Retail and Cost of Goods Sold. Similar measures in other versions include: LY Assort Gross Profit R and CP Assort Gross Profit R.
WP Assort Gross Profit %	The gross profit percentage in a working plan's assortment for the cluster. Similar measures in other versions include: LY Assort Gross Profit % and CP Assort Gross Profit %

**Table 8–50 (Cont.) 2. ASO Assortment Summary View Measures**

<b>Label</b>	<b>Description</b>
ASO Assort Core Distinct Count	The number of unique or distinct core items in an ASO recommended assortment for the cluster. Note that ASO results (recommendations) data is available at the SKU/Store level.
ASO Assort Core Max Count	The maximum number of core items in a store under a cluster/trading area in an ASO recommended assortment for the cluster. Note that the ASO results (recommendations) data is available at the SKU/Store level.
ASO Assort Core Min Count	The minimum number of core items in a store under a cluster/trading area in an ASO recommended assortment for the cluster. Note that the ASO results (recommendations) data is available at the SKU/Store level.
ASO Assort Sales U	The sales units in an ASO recommended assortment. Note that the ASO results (recommendations) data is available at the SKU/Store level.
ASO Assort Sales R	The sales retail value in an ASO recommended assortment. Note that the ASO results (recommendations) data is available at the SKU/Store level.
ASO Assort Gross Profit R	The gross profit retail value in an ASO recommended assortment. Note that the ASO results (recommendations) data is available at the SKU/Store level.
ASO Assort Gross Profit %	The gross profit retail percentage in an ASO recommended assortment. Note that the ASO results (recommendations) data is available at the SKU/Store level.
LY AS Combined Assort Core Distinct Count	The combined number of unique or distinct core items in last year's assortment at the cluster level, taking into consideration both store level (ASLY) and cluster level (ACLY) measures. Similar measures in other versions include: WP AS Combined Assort Core Distinct Count, CP AS Combined Assort Core Distinct Count, and LP AS Combined Assort Core Distinct Count.
LY AS Combined Assort Core Max Count	The maximum number of core items in a store under a cluster/trading area in last year's assortment, taking into consideration both store level (ASLY) and cluster level (ACLY) measures. Similar measures in other versions include: WP AS Combined Assort Core Max Count, CP AS Combined Assort Core Max Count, and LP AS Combined Assort Core Max Count.
LY AS Combined Assort Core Min Count	The minimum number of core items in a store under a cluster/trading area in last year's assortment, taking into consideration both store level (ASLY) and cluster level (ACLY) measures. Similar measures in other versions include: WP AS Combined Assort Core Min Count, CP AS Combined Assort Core Min Count, and LP AS Combined Assort Core Min Count.
LY AS Combined Assort Sales U	The combined sales units in last year's assortment at the cluster level, taking into consideration both store level (ASLY) and cluster level (ACLY) measures. Similar measures in other versions include: WP AS Combined Assort Sales U and CP AS Combined Assort Sales U.
LY AS Combined Assort Sales R	The combined sales retail value in last year's assortment at the cluster level, taking into consideration both store level (ASLY) and cluster level (ACLY) measures. Similar measures in other versions include: WP AS Combined Assort Sales R and CP AS Combined Assort Sales R.

**Table 8–50 (Cont.) 2. ASO Assortment Summary View Measures**

<b>Label</b>	<b>Description</b>
LY AS Combined Assort Gross Profit R	The combined gross profit retail value in last year's assortment at the cluster level, taking into consideration both store level (ASLY) and cluster level (ACLY) measures. Similar measures in other versions include: WP AS Combined Assort Gross Profit R and CP AS Combined Assort Gross Profit R.
LY AS Combined Assort Gross Profit %	The combined gross profit retail percentage in last year's assortment at the cluster level, taking into consideration both store level (ASLY) and cluster level (ACLY) measures. Similar measures in other versions include: WP AS Combined Assort Gross Profit % and CP AS Combined Assort Gross Profit %.
WP AS Combined Assort Optional Distinct Count	The combined number of unique or distinct optional items in last year's assortment at the cluster level, taking into consideration both store level (ASLY) and cluster level (ACLY) measures. Similar measures in other versions include: WP AS Combined Assort Optn Distinct Count, CP AS Combined Assort Optn Distinct Count, and LP AS Combined Assort Optn Distinct Count.
WP AS Combined Assort Optional Max Count	The combined maximum number of optional items in last year's assortment at the cluster level, taking into consideration both store level (ASLY) and cluster level (ACLY) measures. Similar measures in other versions include: WP AS Combined Assort Optn Max Count, CP AS Combined Assort Optn Max Count, and LP AS Combined Assort Optn Max Count.
WP AS Combined Assort Optional Min Count	The combined minimum number of optional items in last year's assortment at the cluster level, taking into consideration both store level (ASLY) and cluster level (ACLY) measures. Similar measures in other versions include: WP AS Combined Assort Optn Min Count, CP AS Combined Assort Optn Min Count, and LP AS Combined Assort Optn Min Count.
WP AS Combined Assort Mandatory Distinct Count	The combined number of unique or distinct mandatory items in last year's assortment at the cluster level, taking into consideration both store level (ASLY) and cluster level (ACLY) measures. Similar measures in other versions include: WP AS Combined Assort Mandatory Distinct Count, CP AS Combined Assort Mandatory Distinct Count, and LP AS Combined Assort Mandatory Distinct Count.
WP AS Combined Assort Mandatory Max Count	The combined maximum number of optional items in last year's assortment at the cluster level, taking into consideration both store level (ASLY) and cluster level (ACLY) measures. Similar measures in other versions include: WP AS Combined Assort Mandatory Max Count, CP AS Combined Assort Mandatory Max Count, and LP AS Combined Assort Mandatory Max Count.
WP AS Combined Assort Mandatory Min Count	The combined minimum number of optional items in last year's assortment at the cluster level, taking into consideration both store level (ASLY) and cluster level (ACLY) measures. Similar measures in other versions include: WP AS Combined Assort Mandatory Min Count, CP AS Combined Assort Mandatory Min Count, and LP AS Combined Assort Mandatory Min Count.
WP ASO Assort # Facings	The number of facings allotted to a SKU in the planograms (POGs) in a store layout after the working plan assortment's space optimization by ASO). This measure is an output from ASO. Similar measures in different versions include: LY ASO Assort # Facings, CP ASO Assort # Facings, and LP ASO Assort # Facings.

**Table 8–50 (Cont.) 2. ASO Assortment Summary View Measures**

<b>Label</b>	<b>Description</b>
WP ASO Assort Avg Days of Supply	The inventory or stock cover measured as the average number of days of inventory supply present at the store at any given time during the planning period. This measure is an output from ASO. Similar measures in different versions include: LY ASO Assort Avg Days of Supply, CP ASO Assort Avg Days of Supply, and LP ASO Assort Avg Days of Supply.
WP ASO Assort Avg Service Level	The average service level that represents the probability an item's availability at a store in the working plan assortment. This measure is an output from ASO. Similar measures in different versions include: LY ASO Assort Avg Service Level, CP ASO Assort Avg Service Level, and LP ASO Assort Avg Service Level.
WP ASO Assort Facings Length	The length of the number of facings allotted to a SKU in the POGs in a store layout after the working plan assortment's space optimization by ASO. This measure is an output from ASO. Similar measures in different versions include: LY ASO Assort Facings Length, CP ASO Assort Facings Length, LP ASO Assort Facings Length.
WP ASO POG Length	The length of the POG in which a SKU is merchandised at the store per the working plan assortment's space optimization by ASO. This measure is an output from ASO. Grouping of stores in the form of space clusters is done on the basis of POG length.
WP ASO POG Loc Count	The number of locations in which a particular planogram is used to display merchandise at a store per the working assortment's space optimization by ASO. This measure is an output from ASO.
WP Assort Carried	A Boolean flag measure indicating whether an item is part of the working plan assortment. Core items are part of the assortment. Similar measures in other versions include: LY Assort Carried, CP Assort Carried, and LP Assort Carried.
WP Assort Core	A Boolean flag measure indicating whether an item is a core item in the working plan's assortment for the cluster. Similar measures in other versions include: LY Assort Core, CP Assort Core, and LP Assort Core.

### Measure Profiles

The ASO Assortment Summary view is used to review and compare ASO results in relation to the exported assortment, in particular, and other version assortments. Combined measure profiles are used to capture assortment plan information when there are store level assortment plans under a cluster level assortment plan.

Combined WP/Combined CP: This profile is used to compare ASO results summary in relation to the combined working plan assortment with the combined current plan assortment.

Combined WP/Combined LP: This profile is used to compare the ASO results summary combined with the working plan assortment and last plan assortment.

Combined WP/Combined LY: This profile presents a comparison of ASO results summary in relation to the combined working plan assortment with the combined last year's assortment plan.

WP+LY+Combined LY: This is the default measure profile used to compare the ASO results summary in relation to a working plan assortment at the cluster level (which was exported to ASO), last year's assortment plan at the cluster level, and last year's combined assortment plan.

### 3. ASO Assortment Details and Space Productivity View

Use this view to review and compare the details of the ASO results comprised of the ASO recommended assortment, plan and space productivity information, the exported working plan assortment, other versions (LY, LP and CP), and their combined versions along with their space productivity information.

This view can be viewed at the space cluster level, which is a subset of store clusters used in assortment planning. Space clusters is a grouping of stores based on the POG used by a SKU across the location hierarchy. Planograms are identified by the POG Length measure. POG Length is presented as a location hierarchy attribute used to view the assortment by space clusters.

**Figure 8–62 3. ASO Assortment Details and Space Productivity View**

	Ground	Instant	Single Serve	Whole
WP Assort Carried	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
WP Mandatory	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WP Mandatory Count	0	0	0	0
WP Assort Core	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
WP Assort Core Count	2	1	0	0
WP Assort Optn	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WP Assort Optn Count	0	0	0	0
WP Assort Sales U	728,319	309,698	168,588	206,863
WP Assort Sales R	6,269.4 K	2,720.8 K	1,158.3 K	1,895.7 K
WP Assort Gross Profit R	2,047.1 K	799.3 K	298.7 K	784.0 K
WP Assort Gross Profit %	32.7 %	29.4 %	25.8 %	41.4 %
ASO Assort Core	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ASO Assort Core Distinct Count	20	10	4	5
ASO Assort Core Max Count	20	10	4	5
ASO Assort Core Min Count	0	0	0	0
ASO Assort Store Core Count	2	1	0	0
WP ASO Assort Facings Length	104,832	52,992	9,216	17,280
WP ASO Assort # Facings	288	150	60	63
WP ASO Assort Avg Service Level	0.89	1.04	1.11	1.51
WP ASO Assort Avg Days of Supply	0.00	0.01	0.01	0.01
ASO Assort Sales R per Linear Unit	24.51	23.97	24.49	54.84
ASO Assort Sales R per facing	8920.94	8460.11	3761.43	15043.01
ASO Assort Gross Profit R per Linear Unit	9.66	8.25	7.49	26.44
ASO Assort Gross Profit R per facing	3514.90	2913.16	1150.36	7252.04
ASO Assort Sales U	300,812	153,599	32,849	103,413
ASO Assort Sales R	2,569.2 K	1,270.4 K	225.7 K	947.7 K
ASO Assort Gross Profit R	1,012.3 K	437.0 K	69.0 K	456.9 K
ASO Assort Gross Profit %	0.39	0.34	0.31	0.48
LY AS Combined Assort Core	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
LY AS Combined Assort Core Distinct Count	61	30	6	10

Table 8–51 lists the measures available in this view.

**Table 8–51 3. ASO Assortment Details and Space Productivity View Measures**

Label	Description
WP Assort Carried	A Boolean flag measure indicating whether an item is part of the working plan assortment for the cluster. Core items are part of the assortment. Similar measures in other versions include: LY Assort Carried, CP Assort Carried, and LP Assort Carried.
WP Mandatory	A Boolean flag measure used to mark an item as mandatory in a working plan assortment for the cluster.
WP Mandatory Count	The number of mandatory items in a working plan assortment for the cluster. Similar measures in other versions: LY Mandatory Count, CP Mandatory Count, and LP Mandatory Count.
WP Assort Core	A Boolean flag measure indicating whether an item is a core item in the working plan's assortment for the cluster. Similar measures in other versions include: LY Assort Core, CP Assort Core, and LP Assort Core.

**Table 8–51 (Cont.) 3. ASO Assortment Details and Space Productivity View Measures**

<b>Label</b>	<b>Description</b>
WP Assort Core Count	The number of core items in a working plan assortment for the cluster level. Similar measures in other versions: LY Assort Core Count, CP Assort Core Count, and LP Assort Core Count.
WP Assort Optn	A Boolean flag measure indicating whether an item is an optional item in the working plan's assortment for the cluster. Similar measures in other versions include: LY Assort Optn, CP Assort Optn, and LP Assort Optn.
WP Assort Optn Count	The number of optional items in a working plan assortment at the cluster level. Similar measures in other versions: LY Assort Optn Count, CP Assort Optn Count, and LP Assort Optn Count.
WP Assort Sales U	The sales units in the working plan's assortment for the cluster. Similar measures in other versions: LY Assort Sales U and CP Assort Sales U.
WP Assort Sales R	The sales retail value in the working plan's assortment for the cluster. Similar measure in other versions: LY Assort Sales R and CP Assort Sales R.
WP Assort Gross Profit R	The gross profit retail value in a working plan's assortment for the cluster. Gross Profit Retail is the difference between Sales Retail and Cost of Goods Sold. Similar measures in other versions: LY Assort Gross Profit R and CP Assort Gross Profit R.
WP Assort Gross Profit %	The gross profit percentage in a working plan's assortment for the cluster. Similar measures in other versions: LY Assort Gross Profit % and CP Assort Gross Profit %.
ASO Assort Core	A Boolean flag measure indicating whether an item is a core item in an ASO recommended assortment. Note that ASO results (recommendations) data is available at the SKU/Store level.
ASO Assort Core Distinct Count	The number of unique or distinct core items in an ASO recommended assortment for the cluster. Note that ASO results (recommendations) data is available at the SKU/Store level.
ASO Assort Core Max Count	The maximum number of core items in a store under a cluster/trading area in an ASO recommended assortment for the cluster. Note that ASO results (recommendations) data is available at the SKU/Store level.
ASO Assort Core Min Count	The minimum number of core items in a store under a cluster/trading area in an ASO recommended assortment for the cluster. Note that ASO results (recommendations) data is available at the SKU/Store level.
ASO Assort Store Core Count	The number of core items in a store in an ASO recommended assortment. Note that ASO results (recommendations) data is available at the SKU/Store level.
WP ASO Assort Facings Length	The length of the number of facings allotted to a SKU in the POGs in a store layout after the working plan assortment's space optimization by ASO. This measure is an output from ASO. Similar measures in different versions include: LY ASO Assort Facings Length, CP ASO Assort Facings Length, and LP ASO Assort Facings Length.
WP ASO Assort # Facings	The number of facings allotted to a SKU in the POGs in a store layout after the working plan assortment's space optimization by ASO. This measure is an output from ASO. Similar measures in different versions include: LY ASO Assort # Facings, CP ASO Assort # Facings, and LP ASO Assort # Facings.

**Table 8–51 (Cont.) 3. ASO Assortment Details and Space Productivity View Measures**

<b>Label</b>	<b>Description</b>
WP ASO Assort Min Service Level	The minimum of the average service level values among all the stores under the cluster in the working plan assortment. Average service level data is supplied by ASO. Similar measures in different versions include: LY ASO Assort Min Service Level, CP ASO Assort Min Service Level, and LP ASO Assort Min Service Level.
WP ASO Assort Avg Service Level	The average service level that represents the probability an item's availability at a store in the working plan assortment. This measure is an output from ASO. Similar measures in different versions include: LY ASO Assort Avg Service Level, CP ASO Assort Avg Service Level, and LP ASO Assort Avg Service Level.
WP ASO Assort Avg Days of Supply	The inventory or stock cover measured as the average number of days of inventory supply present at the store at any given time during the planning period. This measure is an output from ASO. Similar measures in different versions include: LY ASO Assort Avg Days of Supply, CP ASO Assort Avg Days of Supply, and LP ASO Assort Avg Days of Supply.
ASO Assort Sales R per Linear Unit	The sales retail value return per linear unit of facings length in the ASO recommended assortment.
ASO Assort Sales R per facing	The sales retail value return per facing in the ASO recommended assortment.
ASO Assort Gross Profit R per Linear Unit	The gross profit retail value return per linear unit in the ASO recommended assortment.
ASO Assort Gross Profit R per facing	The gross profit retail value return per facing in the ASO recommended assortment.
ASO Assort Sales U	The sales units in an ASO recommended assortment. Note that ASO results (recommendations) data is available at the SKU/Store level.
ASO Assort Sales R	The sales retail value in an ASO recommended assortment. Note that ASO results (recommendations) data is available at the SKU/Store level.
ASO Assort Gross Profit R	The gross profit retail value in an ASO recommended assortment. Note that ASO results (recommendations) data is available at the SKU/Store level.
ASO Assort Gross Profit %	The gross profit retail percentage in an ASO recommended assortment. Note that ASO results (recommendations) data is available at the SKU/Store level.
LY AS Combined Assort Core	A combined Boolean flag measure indicating whether an item is a core item in last year's assortment. It is calculated by taking into consideration the core flag measures both at the cluster level (LY Assort Core) and store level (AS LY Assort Core). Similar measures in other versions: WP AS Combined Assort Core, CP AS Combined Assort Core, and LP AS Combined Assort Core.
LY AS Combined Assort Core Distinct Count	The combined number of unique or distinct core items in last year's assortment at the cluster level, taking into consideration both store level (ASLY) and cluster level (ACLY) measures. Similar measures in other versions: WP AS Combined Assort Core Distinct Count, CP AS Combined Assort Core Distinct Count, and LP AS Combined Assort Core Distinct Count. This type measure is known as a Combined Assort Core Distinct Count measure.

**Table 8–51 (Cont.) 3. ASO Assortment Details and Space Productivity View Measures**

<b>Label</b>	<b>Description</b>
LY AS Combined Assort Core Max Count	The maximum number of core items in a store under a cluster/trading area in last year's assortment, taking into consideration both store level (ASLY) and cluster level (ACLY) measures. Similar measures in other versions: WP AS Combined Assort Core Max Count, CP AS Combined Assort Core Max Count, and LP AS Combined Assort Core Max Count.
LY AS Combined Assort Core Min Count	The minimum number of core items in a store under a cluster/trading area in last year's assortment, taking into consideration both store level (ASLY) and cluster level (ACLY) measures. Similar measures in other versions: WP AS Combined Assort Core Min Count, CP AS Combined Assort Core Min Count, and LP AS Combined Assort Core Min Count.
LY AS Combined Assort Sales U	The combined sales units in last year's assortment at the cluster level, taking into consideration both store level (ASLY) and cluster level (ACLY) measures. Similar measures in other versions: WP AS Combined Assort Sales U and CP AS Combined Assort Sales U.
LY AS Combined Assort Sales R	The combined sales retail value in last year's assortment at the cluster level, taking into consideration both store level (ASLY) and cluster level (ACLY) measures. Similar measures in other versions: WP AS Combined Assort Sales R and CP AS Combined Assort Sales R.
LY AS Combined Assort Gross Profit R	The combined gross profit retail value in last year's assortment at the cluster level, taking into consideration both store level (ASLY) and cluster level (ACLY) measures. Similar measures in other versions: WP AS Combined Assort Gross Profit R and CP AS Combined Assort Gross Profit R.
LY AS Combined Assort Gross Profit %	The combined gross profit retail percentage in last year's assortment at the cluster level, taking into consideration both store level (ASLY) and cluster level (ACLY) measures. Similar measures in other versions: WP AS Combined Assort Gross Profit % and CP AS Combined Assort Gross Profit %.
LY AS Combined Assort Sales R per Linear Unit	The combined sales retail value return per linear unit of facings length in last year's assortment at the cluster level. It is calculated by dividing LY AS Combined Assort Sales R by LY ASO Assort Facings Length. Similar measures in other versions: WP AS Combined Assort Sales R per Linear Unit and CP AS Combined Assort Sales R per Linear Unit.
LY AS Combined Assort Sales R per facing	The combined sales retail value return per facing in last year's assortment at the cluster level. It is calculated by dividing LY AS Combined Assort Sales R by LY ASO Assort # Facings. Similar measures in other versions: WP AS Combined Assort Sales R per facing and CP AS Combined Assort Sales R per facing.
LY AS Combined Gross Profit R per Linear Unit	The combined gross profit retail value return per linear unit of facings length in last year's assortment at the cluster level. It is calculated by dividing LY AS Combined Assort Gross Profit R by LY ASO Assort Facings Length. Similar measures in other versions: WP AS Combined Assort Gross Profit R per Linear Unit and CP AS Combined Assort Gross Profit R per Linear Unit.
LY AS Combined Gross Profit R per facing	The combined gross profit retail value return per facing in last year's assortment at the cluster level. It is calculated by dividing LY AS Combined Assort Gross Profit R by LY ASO Assort # Facings. Similar measures in other versions: WP AS Combined Assort Gross Profit R per facing and CP AS Combined Assort Gross Profit R per facing.

**Table 8–51 (Cont.) 3. ASO Assortment Details and Space Productivity View Measures**

<b>Label</b>	<b>Description</b>
LY Assort Sales R per Linear Unit	The sales retail value return per linear unit of facings length in last year's assortment at the cluster level. It is calculated by dividing LY Assort Sales R by LY ASO Assort Facings Length.
LY Assort Sales R per facing	The sales retail value return per linear unit of facings length in last year's assortment at the cluster level. It is calculated by dividing LY Assort Sales R by LY ASO Assort # Facings.
LY Assort Gross Profit R per Linear Unit	The gross profit retail value return per linear unit of facings length. It is calculated by dividing LY Gross Profit R by LY ASO Assort Facings Length.
LY Assort Gross Profit R per facing	The gross profit retail value return per facing. It is calculated by dividing LY Gross Profit R by LY ASO Assort # Facings.
WP ASO POG Length	The length of the POG in which a SKU is merchandised at the store per the working plan assortment's space optimization by ASO. This measure is an output from ASO. The grouping of stores in the form of space clusters is done on the basis of POG length.
WP ASO POG Loc Count	The number of locations in which a particular planogram is used to display merchandise at a store per the working assortment's space optimization by ASO. This measure is an output from ASO.

**Measure Profiles**

The ASO Assortment Details and Space Productivity view is used to review details of the ASO results in the form of assortment plan and space productivity information. Combined measure profiles are used to capture assortment plan information when there are store level assortment plans under a cluster level assortment plan.

Combined WP/Combined CP: This presents a comparison of ASO assortment plan details and space productivity information in relation to the combined working plan assortment and combined current plan assortment.

Combined WP/Combined LP: This presents a comparison of ASO assortment plan details and space productivity information in relation to the combined working plan assortment and combined last plan assortment.

Combined WP/Combined LY: This presents a comparison of ASO assortment plan details and space productivity information in relation to the combined working plan assortment and combined last year's assortment plan.

WP/Combined LY: This is the default view measure profile. It presents a comparison of ASO assortment plan details and space productivity information in relation to the working plan assortment at the cluster level (which was exported to ASO) and combined last year's assortment plan.

**ASO Assortment by Location and Space Tab**

This tab has two views.

**1. ASO Assortment by Location View**

Use this view to review the ASO recommended assortment, location-wise. Compare the presence of an item across different locations under the trading area and cluster in the ASO recommended assortment in relation to the presence in the exported working plan assortment. The number of locations at which an item is marked as mandatory,

core, and optional in the working plan assortment and other versions of plan is also highlighted in this view. The number of locations at which an item is marked as core in the ASO recommended assortment is also shown here.

This view can be viewed at the space cluster level, which is a subset of store clusters used in assortment planning. Space clusters is a grouping of stores based on the POG used by a SKU across the location hierarchy. Planograms are identified by the POG Length measure. POG Length is presented as a location hierarchy attribute to view the assortment by space clusters.

**Figure 8–63 1. ASO Assortment by Location View**

Table 8–52 lists the measures available in this view.

**Table 8–52 1. ASO Assortment by Location View Measures**

Label	Description
WP Assort Core	A Boolean flag measure indicating whether an item is a core item in the working plan's assortment for the cluster. Similar measures in other versions: LY Assort Core, CP Assort Core, and LP Assort Core.
WP Mandatory	A Boolean flag measure used to mark an item as mandatory in a working plan assortment for the cluster. Similar measures in other versions: LY Mandatory, CP Mandatory, and LP Mandatory.
WP Assort Optn	A Boolean flag measure indicating whether an item is an optional item in the working plan's assortment for the cluster. Similar measures in other versions: LY Assort Optn, CP Assort Optn, and LP Assort Optn.
WP Assort Number of Locations for Core	The number of locations at which an item is marked as core in the working plan assortment. Similar measures in other versions: LY Assort Number of Locations for Core, CP Assort Number of Locations for Core, and LP Assort Number of Locations for Core.
WP Assort Number of Locations for Mandatory	The number of locations at which an item is marked as mandatory in the working plan assortment. Similar measures in other versions: LY Assort Number of Locations for Mandatory, CP Assort Number of Locations for Mandatory, and LP Assort Number of Locations for Mandatory.

**Table 8–52 (Cont.) 1. ASO Assortment by Location View Measures**

<b>Label</b>	<b>Description</b>
WP Assort Number of Locations for Optn	The number of locations at which an item is marked as optional in the working plan assortment. Similar measures in other versions: LY Assort Number of Locations for Optn, CP Assort Number of Locations for Optn, and LP Assort Number of Locations for Optn.
ASO Assort Core	A Boolean flag measure indicating whether an item is a core item in an ASO recommended assortment. Note that the ASO results (recommendations) data is available at the SKU/Store level.
ASO Assort Number of Locations for Core	The number of locations at which an item is marked as core in the ASO recommended assortment.
WP ASO POG Length	The length of the POG in which a SKU is merchandised at the store per the working plan assortment's space optimization by ASO. This measure is an output from ASO. The grouping of stores in the form of space clusters is done on the basis of POG length.
WP AS Combined Assort Core	A combined Boolean flag measure indicating whether an item is a core item in the working plan assortment. It is calculated by taking into consideration core flag measures both at the cluster level (WP Assort Core) and store level (AS WP Assort Core). Similar measures in other versions: LY AS Combined Assort Core, CP AS Combined Assort Core, and LP AS Combined Assort Core.
WP AS Combined Assort Optn	A combined Boolean flag measure indicating whether an item is an optional item in the working plan assortment. It is calculated by taking into consideration optional flag measures both at cluster level (WP Assort Optn) and store level (AS WP Assort Optn). Similar measures in other versions: LY AS Combined Assort Optn, CP AS Combined Assort Optn, and LP AS Combined Assort Optn.
WP AS Combined Mandatory	A combined Boolean flag measure indicating whether an item is a mandatory item in the working plan assortment. It is calculated by taking into consideration mandatory flag measures both at the cluster level (WP Assort Mandatory) and store level (AS WP Assort Mandatory). Similar measures in other versions: LY AS Combined Assort Mandatory, CP AS Combined Assort Mandatory, and LP AS Combined Assort Mandatory.
WP Assort Carried	A Boolean flag measure indicating whether an item is part of the working plan assortment. Core items are part of the assortment. Similar measures in other versions: LY Assort Carried, CP Assort Carried, and LP Assort Carried.
WP AS Combined Assort Carried	A combined Boolean flag measure indicating whether an item is part of the working plan assortment. Core items are part of the assortment. It is calculated by taking into consideration core flag measures both at the cluster level (WP Assort Core) and store level (AS WP Assort Core). Similar measures in other versions: LY Assort Carried, CP Assort Carried, and LP Assort Carried.
AS WP Assort Carried	A Boolean flag measure indicating whether an item is part of the working plan assortment for the store. Core items are part of the assortment. Similar measures in other versions: AS LY Assort Carried, AS CP Assort Carried, and AS LP Assort Carried.
AS WP Assort Core	A Boolean flag measure indicating whether an item is a core item in the working plan's assortment for the store. Similar measures in other versions: AS LY Assort Core, AS CP Assort Core, and AS LP Assort Core.

**Table 8–52 (Cont.) 1. ASO Assortment by Location View Measures**

Label	Description
AS WP Assort Optn	A Boolean flag measure indicating whether an item is an optional item in the working plan's assortment for the store. Similar measures in other versions: AS LY Assort Optn, AS CP Assort Optn, and AS LP Assort Optn.
AS WP Mandatory	A Boolean flag measure used to mark an item as mandatory in a working plan assortment for the store. Similar measures in other versions: AS LY Mandatory, AS CP Mandatory, and AS LP Mandatory.

**Measure Profiles**

The ASO Assortment by Location view is used to review the ASO assortment, location-wise. Combined measure profiles are used to capture the assortment plan information when there are exception store level assortment plans under a cluster level assortment plan.

Combined CP/ASO: This measure profile presents an ASO recommended assortment with the combined current plan assortment for location-wise comparison.

Combined LP/ASO: This measure profile presents an ASO recommended assortment with the combined last plan assortment for a location-wise comparison.

Combined LY/ASO: This measure profile presents an ASO recommended assortment with the combined last year assortment for a location-wise comparison.

Combined WP/ASO: This measure profile presents an ASO recommended assortment with the combined working plan assortment for a location-wise comparison.

WP/ASO: This is the default measure profile. It presents an ASO recommended assortment with the working plan assortment (exported assortment to ASO) for a location-wise comparison.

**2. ASO Assortment by Space View**

Use this view to review the space allocated to an item across different locations under the trading area and cluster in an ASO recommended assortment. It also presents a comparison of space allocated to an item with other versions of the assortment such as, CP, LP, and LY.

This view can be viewed at the space cluster level, which is a subset of store clusters used in assortment planning. Space clusters is a grouping of stores based on the POG used by a SKU across the location hierarchy. Planograms are identified by the POG Length measure. POG Length is presented as a location hierarchy attribute to view the assortment by space clusters.

**Figure 8–64 2. ASO Assortment by Space View**

Product	Location	WP Assort Core	WP Mandatory	WP Assort Optn	WP Assort Number of Locations for Core	WP Assort Number of Locations for Mandatory	WP Assort Number of Locations for Optn	ASO Assort Core	ASO Assort Number of Locations for Core	LY Assort Number of Locations for Core	CP Assort Number of Locations for Core	WP ASO Assort Facings Length	WP ASO Assort # Facings
Coffee	Ground   1234788 - PL 100% Columbian Non-Flavored Regular - Caffeinated 12 oz Can				0	0	0		0	3	0	1,152	0

Table 8–53 lists the measures available in this view.

**Table 8–53 2. ASO Assortment by Space View Measures**

<b>Label</b>	<b>Description</b>
WP Assort Core	A Boolean flag measure indicating whether an item is a core item in the working plan's assortment for the cluster. Similar measures in other versions: LY Assort Core, CP Assort Core, and LP Assort Core.
WP Mandatory	A Boolean flag measure used to mark an item as mandatory in a working plan assortment for the cluster. Similar measures in other versions: LY Mandatory, CP Mandatory, and LP Mandatory.
WP Assort Optn	A Boolean flag measure indicating whether an item is an optional item in the working plan's assortment for the cluster. Similar measures in other versions: LY Assort Optn, CP Assort Optn, and LP Assort Optn.
WP Assort Number of Locations for Core	The number of locations at which an item is marked as core in the working plan assortment. Similar measures in other versions: LY Assort Number of Locations for Core, CP Assort Number of Locations for Core, and LP Assort Number of Locations for Core.
WP Assort Number of Locations for Mandatory	The number of locations at which an item is marked as mandatory in the working plan assortment. Similar measures in other versions: LY Assort Number of Locations for Mandatory, CP Assort Number of Locations for Mandatory, and LP Assort Number of Locations for Mandatory.
WP Assort Number of Locations for Optn	The number of locations at which an item is marked as optional in the working plan assortment. Similar measures in other versions: LY Assort Number of Locations for Optn, CP Assort Number of Locations for Optn, and LP Assort Number of Locations for Optn.
ASO Assort Core	A Boolean flag measure indicating whether an item is a core item in an ASO recommended assortment. Note that the ASO results (recommendations) data is available at the SKU/Store level.
ASO Assort Number of Locations for Core	The number of locations at which an item is marked as core in the ASO recommended assortment.
WP ASO Assort Facings Length	The length of the number of facings allotted to a SKU in the POGs in a store layout after the working plan assortment's space optimization by ASO. This measure is an output from ASO. Similar measure in different versions: LY ASO Assort Facings Length, CP ASO Assort Facings Length, and LP ASO Assort Facings Length.
WP ASO Assort # Facings	The number of facings allotted to a SKU in the POGs in a store layout after the working plan assortment's space optimization by ASO. This measure is an output from ASO. Similar measure in different versions: LY ASO Assort # Facings, CP ASO Assort # Facings, and LP ASO Assort # Facings.
WP ASO POG Length	The length of the POG in which a SKU is merchandised at the store per the working plan assortment's space optimization by ASO. This measure is an output from ASO. The grouping of stores in the form of space clusters is done on the basis of POG length.

**Table 8–53 (Cont.) 2. ASO Assortment by Space View Measures**

<b>Label</b>	<b>Description</b>
WP AS Combined Assort Core	A combined Boolean flag measure indicating whether an item is a core item in the working plan assortment. It is calculated by taking into consideration core flag measures both at the cluster level (WP Assort Core) and store level (AS WP Assort Core). Similar measures in other versions: LY AS Combined Assort Core, CP AS Combined Assort Core, and LP AS Combined Assort Core.
WP AS Combined Assort Optn	A combined Boolean flag measure indicating whether an item is an optional item in the working plan assortment. It is calculated by taking into consideration optional flag measures both at the cluster level (WP Assort Optn) and store level (AS WP Assort Optn). Similar measures in other versions: LY AS Combined Assort Optn, CP AS Combined Assort Optn, and LP AS Combined Assort Optn.
WP AS Combined Mandatory	A combined Boolean flag measure indicating whether an item is a mandatory item in the working plan assortment. It is calculated by taking into consideration mandatory flag measures both at the cluster level (WP Assort Mandatory) and store level (AS WP Assort Mandatory). Similar measures in other versions: LY AS Combined Assort Mandatory, CP AS Combined Assort Mandatory, and LP AS Combined Assort Mandatory.
WP Assort Carried	A Boolean flag measure indicating whether an item is part of the working plan assortment. Core items are part of the assortment. Similar measures in other versions: LY Assort Carried, CP Assort Carried, and LP Assort Carried.
WP AS Combined Assort Carried	A combined Boolean flag measure indicating whether an item is part of the working plan assortment. Core items are part of the assortment. It is calculated by taking into consideration core flag measures both at the cluster level (WP Assort Core) and store level (AS WP Assort Core). Similar measures in other versions: LY Assort Carried, CP Assort Carried, and LP Assort Carried.

### Measure Profiles

The ASO Assortment by Space view is used to review space allocated to items in the ASO recommended assortment. Combined measure profiles are used to capture assortment plan information when there are store level assortment plans under a cluster level assortment plan.

Combined WP/ASO/CP/LY: This measure profile is used to view and compare the space information of the combined working plan assortment, ASO assortment, current plan assortment, and last year's assortment.

WP/ASO/CP/LY: This is the default measure profile. It is used to view and compare space information of the working plan assortment, ASO assortment, current plan assortment, and last year's assortment.

## Accept ASO Results and Approve Assortment Step

Use this step to accept ASO results, review the space optimized assortment, approve it, and finalize it for implementation.

### Prior to starting this step:

The ASO results should have been imported and reviewed in the previous step.

**After completing this step:**

Space optimized assortments are finalized for implementation under this step. If there is a need for store-level assortments under a cluster, prior to approving an assortment under this step, the next step is to go to Assortment Planning @Store.

This step has the following tabs and views:

- [Accept ASO Results and Finalize Assortment Tab:](#)
  1. [Accept ASO Results View](#)
  2. [Review Space Optimized Assortment View](#)
- [Approve Assortment Tab:](#)  
[Approve Assortment View](#)
- [Finalize Assortment for Implementation Tab:](#)  
[Finalize Assortment for Implementation View](#)

## Custom Menu Options

This step has the following custom menu options.

### Accept ASO Results

This custom menu is used to accept ASO results after importing and reviewing them.

### Approve Assortment @Cluster

This custom menu is used to approve an assortment at the cluster level.

### Finalize Assortment to ASO

This custom menu is used to finalize the assortment for space optimization.

## Accept ASO Results and Finalize Assortment Tab

This tab has two views.

### 1. Accept ASO Results View

Use this view to accept ASO results, which have been reviewed in the previous step and been found to be in line with the business requirements. Review the clusters for the ASO results that have been imported. Check the WP Accept flag measure for clusters, where ASO results need to be accepted, choose the required option in WP Accept Type from the drop-down selection, and run the custom menu Accept ASO Results. The two options for accepting ASO results are:

- ASO Assortment and Plan: This option is used to copy the ASO recommended assortment plan, as it is, into the store level measures.
- ASO Assortment only: This option is used to copy only the assortment product-mix from the ASO results. Assortment plan numbers are derived by applying demand transference for the difference between the original working plan exported for space optimization and the ASO recommended assortment.

**Figure 8–65 1. Accept ASO Results View**

Assort Label	Last Exported Ver	Active Export Exists	Exported to ASO	Last Exported Date	ASO Results Imported	ASO Results Imported Date	WP Accept	WP Accept Type	ASO Results Accepted	ASO Results Accepted Date
Coffee - 4th Qtr, FY2014 - 4th Qtr, FY2014	1	<input type="checkbox"/>	<input type="checkbox"/>	02/01/2014	<input type="checkbox"/>	02/01/2014	<input type="checkbox"/>	?	<input type="checkbox"/>	02/01/2014
Mainstream   Large   A (Northwest)	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	02/01/2014	<input checked="" type="checkbox"/>	02/01/2014	<input type="checkbox"/>	ASO Assortment only	<input type="checkbox"/>	02/01/2014
Mainstream   Medium   B (Northwest)	0	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	02/01/2014
Mainstream   Small   C (Northwest)	0	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	02/01/2014
Mainstream   Small   D (Northwest)	0	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	02/01/2014
Mainstream   Small   E (Northwest)	0	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	02/01/2014
Premium   Large   A (Northwest)	0	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	02/01/2014
Premium   Medium   B (Northwest)	0	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	02/01/2014
Premium   Small   C (Northwest)	0	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	02/01/2014
Premium   Small   D (Northwest)	0	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	02/01/2014
Premium   Small   E (Northwest)	0	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	02/01/2014
Value   Large   A (Northwest)	0	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	02/01/2014
Value   Medium   B (Northwest)	0	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	02/01/2014
Value   Small   C (Northwest)	0	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	02/01/2014
Value   Small   E (Northwest)	0	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	02/01/2014

Table 8–54 lists the measures available in this view.

**Table 8–54 1. Accept ASO Results View Measures**

Label	Description
Assort Label	The system-generated label displayed for a working plan assortment which was last exported for assortment space optimization.
Last Exported Ver	Assortment plans exported for space optimization are identified by the assortment set and corresponding version. the assortment set is a sequential system-generated number assigned to an assortment plan exported for a specific product category, trading areas, and quarters. The Assortment Set Version is a sequential system-generated number, representing the number of exports against a specific assortment set. Last Exported version is a system-generated number for an assortment set, used to identify the last assortment plan exported for space optimization.
Last Active Export	A Boolean measure used to indicate if there are any active exports, where the assortment space optimization results are expected.
Exported to ASO	A Boolean measure used to indicate if an assortment has been exported to ASO for space optimization.
Last Exported Date	The date on which an assortment was last exported to ASO.
ASO Results Imported	A Boolean measure used to indicate if ASO results have been imported.
ASO Results Imported Date	The date on which ASO results were imported.
WP Accept	A Boolean flag measure that needs to be marked to run the Accept ASO Results custom menu.
WP Accept Type	A drop-down measure used to enter the accept type before running the Accept ASO Results custom menu. There are two options available: <ul style="list-style-type: none"> <li>ASO Assortment only: Used to accept only the ASO assortment recommendation.</li> <li>ASO Assortment and Plan: Used to accept both the ASO assortment and plan recommendation.</li> </ul>
ASO Results Accepted	A Boolean measure used to indicate if ASO results have been accepted.
ASO Results Accepted Date	The date on which ASO results were accepted.

### **Custom Menus**

Use the Accept ASO Results custom menu to accept the ASO results. The ASO results can be accepted in two ways:

- **ASO Assortment and Plan:** This option is used to copy the ASO recommended assortment plan, as it is, into the store level measures.
- **ASO Assortment only:** This option is used to copy only the assortment product-mix from the ASO results. The assortment plan numbers are derived by applying demand transference for the difference between the original working plan exported for space optimization and the ASO recommended assortment.

## **2. Review Space Optimized Assortment View**

Use this view to review the space-optimized assortment and its space productivity information, after accepting the ASO results, and compare it with different versions of the assortment plans such as, LY, CP, and LP.

The ASO results are available at the SKU/Store level and, on acceptance, are stored in the store level measures (AS WP), which is referred to as the space optimized assortment. Space productivity information is also updated to the working plan measures as part of acceptance.

Combined measures are used to present the assortment plan information at the cluster level by capturing assortment plan information in the store level measures.

This view can be viewed at the space cluster level, which is a subset of store clusters used in assortment planning. Space clusters is the grouping of stores based on the POG used by a SKU across the location hierarchy. Planograms are identified by the POG Length measure. POG Length is presented as a location hierarchy attribute to view the assortment by space clusters.

**Figure 8–66 2. Review Space Optimized Assortment View**

	Ground	Instant	Single Serve	Whole
AS WP Assort Carried	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
AS WP Mandatory	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AS WP Mandatory Count	0	0	0	0
AS WP Assort Core	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
AS WP Assort Core Count	20	10	4	5
AS WP Assort Sales U	300,812	153,599	32,849	103,413
AS WP Assort Sales R	2,569.2 K	1,270.4 K	225.7 K	947.7 K
AS WP Assort Gross Profit R	1,012.3 K	437.0 K	69.0 K	456.9 K
AS WP Assort Gross Profit %	39.4 %	34.4 %	30.6 %	48.2 %
WP ASO Assort Facings Length	104,832	52,992	9,216	17,280
WP ASO Assort # Facings	288	150	60	63
WP ASO Assort Avg Service Level	11.03	12.82	13.73	18.59
AS LY Assort Carried	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
AS LY Mandatory	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AS LY Mandatory Count	0	0	0	0
AS LY Assort Core	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
AS LY Assort Core Count	61	30	6	10
AS LY Assort Sales U	1,155,112	499,339	166,528	220,151
AS LY Assort Sales R	13,106.6 K	6,220.6 K	1,144.1 K	2,378.3 K
AS LY Assort Gross Profit R	5,517.9 K	2,639.1 K	346.4 K	1,142.6 K
AS LY Assort Gross Profit %	42.1 %	42.4 %	30.3 %	48.0 %
LY ASO Assort Facings Length	0	0	0	0
LY ASO Assort # Facings	0	0	0	0
LY ASO Assort Avg Service Level	0.00	0.00	0.00	0.00
AS LY Assort Sales R per Linear Unit	0.00	0.00	0.00	0.00
AS LY Assort Sales R per facing	0.00	0.00	0.00	0.00
AS LY Assort Gross Profit R per Linear Unit	0.00	0.00	0.00	0.00
AS LY Assort Gross Profit R per facing	0.00	0.00	0.00	0.00

Table 8–55 lists the measures available in this view.

**Table 8–55 2. Review Space Optimized Assortment View Measures**

Label	Description
AS WP Assort Carried	A Boolean flag measure indicating whether an item is part of the working plan assortment for the store. Core items are part of the assortment. Similar measures in other versions: AS LY Assort Carried, AS CP Assort Carried, and AS LP Assort Carried.
AS WP Mandatory	A Boolean flag measure used to mark an item as mandatory in a working plan assortment for the store. Similar measures in other versions: AS LY Mandatory, AS CP Mandatory, and AS LP Mandatory.
AS WP Mandatory Count	The number of mandatory items in a working plan assortment for the store. Similar measures in other versions: AS LY Mandatory Count, AS CP Mandatory Count, and AS LP Mandatory Count.
AS WP Assort Core	A Boolean flag measure indicating whether an item is a core item in the working plan's assortment for the store. Similar measures in other versions: AS LY Assort Core, AS CP Assort Core, and AS LP Assort Core.
AS WP Assort Core Count	The number of core items in a working plan assortment for the store. Similar measures in other versions: AS WP Assort Core Count, AS WP Assort Core Count, and AS WP Assort Core Count.
AS WP Assort Optn	A Boolean flag measure indicating whether an item is an optional item in the working plan's assortment for the store. Similar measures in other versions: AS LY Assort Optn, AS CP Assort Optn, and AS LP Assort Optn.

**Table 8–55 (Cont.) 2. Review Space Optimized Assortment View Measures**

<b>Label</b>	<b>Description</b>
AS WP Assort Optn Count	The number of optional items in a working plan assortment at the store level. Similar measures in other versions: AS LY Assort Optn Count, AS CP Assort Optn Count, and AS LP Assort Optn Count
AS WP Assort Sales U	The sales units in the working plan's assortment for the store. Similar measures in other versions: AS LY Assort Sales U and AS CP Assort Sales U.
AS WP Assort Sales R	The sales retail value in the working plan's assortment for the store. Similar measures in other versions: AS LY Assort Sales R and AS CP Assort Sales R.
AS WP Assort Gross Profit R	The gross profit retail value in a working plan's assortment for the store. Gross Profit Retail is the difference between Sales Retail and Cost of Goods Sold. Similar measures in other versions: AS LY Assort Gross Profit R and AS CP Assort Gross Profit R.
AS WP Assort Gross Profit %	The gross profit percentage in a working plan's assortment for the store. Similar measures in other versions: AS LY Assort Gross Profit % and AS CP Assort Gross Profit %.
ASO Assort Store Core Count	The number of core items in a store in an ASO recommended assortment. Note that the ASO results (recommendations) data is available at the SKU/Store level.
WP ASO Assort Facings Length	The length of the number of facings allotted to a SKU in the POGs in a store layout after the working plan assortment's space optimization by ASO. This measure is an output from ASO. Similar measures in different versions: LY ASO Assort Facings Length, CP ASO Assort Facings Length, and LP ASO Assort Facings Length.
WP ASO Assort # Facings	The number of facings allotted to a SKU in the POGs in a store layout after the working plan assortment's space optimization by ASO. This measure is an output from ASO. Similar measures in different versions: LY ASO Assort # Facings, CP ASO Assort # Facings, and LP ASO Assort # Facings.
WP ASO Assort Min Service Level	The minimum of the average service level values among all the stores under the cluster in the working plan assortment. Average service level data is supplied by ASO. Similar measures in different versions: LY ASO Assort Min Service Level, CP ASO Assort Min Service Level, and LP ASO Assort Min Service Level.
WP ASO Assort Avg Service Level	The average service level that represents the probability an item's availability at a store in the working plan assortment. This measure is an output from ASO. Similar measures in different versions: LY ASO Assort Avg Service Level, CP ASO Assort Avg Service Level, and LP ASO Assort Avg Service Level.
ASO Assort Sales R per Linear Unit	The sales retail value return per linear unit of facings length in the ASO recommended assortment.
ASO Assort Sales R per facing	The sales retail value return per facing in the ASO recommended assortment.
ASO Assort Gross Profit R per Linear Unit	The gross profit retail value return per linear unit in the ASO recommended assortment.
ASO Assort Gross Profit R per facing	The gross profit retail value return per facing in the ASO recommended assortment.
ASO Assort Sales U	The sales units in an ASO recommended assortment. Note that the ASO results (recommendations) data is available at the SKU/Store level.

**Table 8–55 (Cont.) 2. Review Space Optimized Assortment View Measures**

<b>Label</b>	<b>Description</b>
ASO Assort Sales R	The sales retail value in an ASO recommended assortment. Note that the ASO results (recommendations) data is available at the SKU/Store level.
ASO Assort Gross Profit R	The gross profit retail value in an ASO recommended assortment. Note that the ASO results (recommendations) data is available at the SKU/Store level.
ASO Assort Gross Profit %	The gross profit retail percentage in an ASO recommended assortment. Note that the ASO results (recommendations) data is available at the SKU/Store level.
AS LY Assort Sales R per Linear Unit	The sales retail return per linear unit of facings length in last year's assortment at the store level. It is calculated by dividing AS LY Assort Sales R by LY ASO Assort Facings Length. Similar measures in other versions: AS WP Assort Sales R per Linear Unit, and AS CP Assort Sales R per Linear Unit.
AS LY Assort Sales R per facing	The sales retail return per facing in last year's assortment at the store level. It is calculated by dividing AS LY Assort Sales R by LY ASO Assort # Facings. Similar measures in other versions: AS WP Assort Sales R per facing, CP AS Assort Sales R per facing.
AS LY Assort Gross Profit R per Linear Unit	The gross profit retail return per linear unit of facings length in last year's assortment at the store level. It is calculated by dividing AS LY Gross Profit R by LY ASO Assort Facings Length. Similar measures in other versions: AS WP Assort Gross Profit R per Linear Unit and AS CP Assort Gross Profit R per Linear Unit.
AS LY Assort Gross Profit R per facing	The gross profit retail return per facing in last year's assortment at the store level. It is calculated by dividing AS LY Assort Gross Profit R by LY ASO Assort # Facings. Similar measures in other versions: AS WP Assort Gross R per Facing and CP AS Assort Gross Profit R per Facing.
WP AS Combined Assort Core	A combined Boolean flag measure indicating whether an item is a core item in the working plan assortment. It is calculated by taking into consideration the core flag measures both at the cluster level (WP Assort Core) and store level (AS WP Assort Core). Similar measures in other versions: LY AS Combined Assort Core, CP AS Combined Assort Core, and LP AS Combined Assort Core.
WP AS Combined Assort Core Distinct Count	The combined number of unique or distinct core items in the working plan assortment at the cluster level, taking into consideration both store level (ASWP) and cluster level (ACWP) measures. Similar measures in other versions: LY AS Combined Assort Core Distinct Count, CP AS Combined Assort Core Distinct Count, and LP AS Combined Assort Core Distinct Count.
WP AS Combined Assort Core Max Count	The maximum number of core items in a store under a cluster/trading area in the working plan assortment, taking into consideration both store level (ASWP) and cluster level (ACWP) measures. Similar measures in other versions: LY AS Combined Assort Core Max Count, CP AS Combined Assort Core Max Count, LP AS Combined Assort Core Max Count.
WP AS Combined Assort Core Max Count	The maximum number of core items in a store under a cluster/trading area in the working plan assortment, taking into consideration both store level (ASWP) and cluster level (ACWP) measures. Similar measures in other versions: LY AS Combined Assort Core Max Count, CP AS Combined Assort Core Max Count, and LP AS Combined Assort Core Max Count.

**Table 8–55 (Cont.) 2. Review Space Optimized Assortment View Measures**

<b>Label</b>	<b>Description</b>
WP AS Combined Assort Core Min Count	The minimum number of core items in a store under a cluster/trading area in the working plan assortment, taking into consideration both store level (ASWP) and cluster level (ACWP) measures. Similar measures in other versions: LY AS Combined Assort Core Min Count, CP AS Combined Assort Core Min Count, and LP AS Combined Assort Core Min Count.
WP AS Combined Assort Sales U	The combined sales units in the working plan assortment at the cluster level, taking into consideration both store level (ASWP) and cluster level (ACWP) measures. Similar measures in other versions: LY AS Combined Assort Sales U and CP AS Combined Assort Sales U.
WP AS Combined Assort Sales R	The combined sales retail value in the working plan assortment at the cluster level, taking into consideration both store level (ASWP) and cluster level (ACWP) measures. Similar measures in other versions: LY AS Combined Assort Sales R and CP AS Combined Assort Sales R.
WP AS Combined Assort Gross Profit R	The combined gross profit retail value in the working plan assortment at the cluster level, taking into consideration both store level (ASWP) and cluster level (ACWP) measures. Similar measures in other versions: LY AS Combined Assort Gross Profit R and CP AS Combined Assort Gross Profit R.
WP AS Combined Assort Gross Profit %	The combined gross profit retail percentage in the working plan assortment at the cluster level, taking into consideration both store level (ASWP) and cluster level (ACWP) measures. Similar measures in other versions: LY AS Combined Assort Gross Profit % and CP AS Combined Assort Gross Profit %.
WP AS Combined Assort Sales R per Linear Unit	The combined sales retail value return per linear unit of facings length in the working plan assortment at the cluster level. It is calculated by dividing WP AS Combined Assort Sales R by WP ASO Assort Facings Length. Similar measures in other versions: LY AS Combined Assort Sales R per Linear Unit and CP AS Combined Assort Sales R per Linear Unit.
WP AS Combined Assort Sales R per facing	The combined sales retail value return per facing in the working plan assortment at the cluster level. It is calculated by dividing WP AS Combined Assort Sales R by WP ASO Assort # Facings. Similar measures in other versions: LY AS Combined Assort Sales R per facing and CP AS Combined Assort Sales R per facing.
WP AS Combined Assort Gross Profit R per Linear Unit	The combined gross profit retail value return per linear unit of facings length in the working plan assortment at the cluster level. It is calculated by dividing WP AS Combined Assort Gross Profit R by WP ASO Assort Facings Length. Similar measures in other versions: LY AS Combined Assort Gross Profit R per Linear Unit and CP AS Combined Assort Gross Profit R per Linear Unit.
LY AS Combined Assort Gross Profit R per facing	The combined gross profit retail value return per facing in the working plan assortment at the cluster level. It is calculated by dividing WP AS Combined Assort Gross Profit R by WP ASO Assort # Facings. Similar measures in other versions: LY AS Combined Assort Gross Profit R per facing and CP AS Combined Assort Gross Profit R per facing.
WP ASO Assort Avg Days of Supply	The inventory or stock cover measured as the average number of days of inventory supply present at the store at any given time during the planning period. This measure is an output from ASO. Similar measure in different versions: LY ASO Assort Avg Days of Supply, CP ASO Assort Avg Days of Supply, and LP ASO Assort Avg Days of Supply.

**Table 8–55 (Cont.) 2. Review Space Optimized Assortment View Measures**

<b>Label</b>	<b>Description</b>
WP ASO POG Length	The length of the POG in which a SKU is merchandised at the store per the working plan assortment's space optimization by ASO. This measure is an output from ASO. The grouping of stores in the form of space clusters is done on the basis of POG length.
WP Mandatory Count	The number of mandatory items in a working plan assortment for the cluster. Similar measures in other versions: LY Mandatory Count, CP Mandatory Count, and LP Mandatory Count.
AC WP Mandatory	Reference Boolean measure used in the store level views to view the items marked as mandatory in the working plan assortment at the cluster level. Similar measures in other versions: AC LY Mandatory, AC CP Mandatory, and AC LP Mandatory.
AC WP Mandatory Count	Reference measure used in the store level views to view the number of items marked as mandatory in the working plan assortment at the cluster level. Similar version in other measures: AC LY Mandatory, AC CP Mandatory, and AC LP Mandatory.

### Measure Profiles

Cluster - Combined WP/Combined CP: This measure profile is applicable when you look at the view at the cluster level on the location hierarchy. It presents a comparison of the combined working plan for the space optimized assortment with the combined current plan assortment.

Cluster - Combined WP/Combined LP: This measure profile is applicable when you look at the view at the cluster level on the location hierarchy. It presents a comparison of the combined working plan of the space optimized assortment with the combined last plan assortment.

Store - WP/CP: This measure profile is applicable when you look at the view at the store level on the location hierarchy. It presents a comparison of the working plan for the space optimized assortment with the current plan assortment.

Store - WP/LP: This measure profile is applicable when you look at the view at the store level on the location hierarchy. It presents a comparison of the working plan for the space optimized assortment with the last plan assortment.

Store - WP/LY: This measure profile is applicable when you look at the view at the store level on the location hierarchy. It presents a comparison of the working plan for the space optimized assortment with the last year assortment.

WP/LY: This measure profile is useful to compare a cluster level assortment without any store exceptions with the space-optimized assortment.

## Approve Assortment Tab

This tab has one view.

### Approve Assortment View

Use this view to approve the assortment by checking the WP Approve to CP measure in two ways:

- The Space Optimized Assortment can be approved by checking the Use ASO Results Boolean flag measure. Space Optimized Assortment is the ASO

recommended assortment which is stored in store-level measures (AS WP type measures).

- The cluster level assortment which was originally exported for space optimization to ASO can be approved by un-checking the Use ASO Results flag measure.

Prior to approving the assortment, the placeholder items, which are part of the assortment, need to be formalized. For information on formalization, see [Chapter 3](#).

**Figure 8–67 Approve Assortment View**

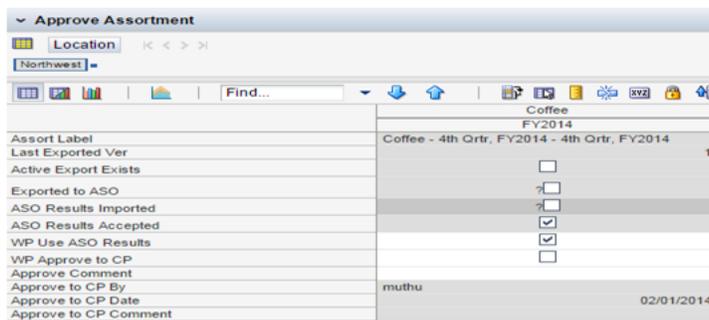


Table 8–56 lists the measures available in this view.

**Table 8–56 Approve Assortment View Measures**

Label	Description
Assort Label	The system-generated label displayed for a working plan assortment which was last exported for assortment space optimization.
Last Exported Ver	Assortment plans exported for space optimization are identified by the assortment set and corresponding version. Assortment set is a sequential system-generated number assigned to an assortment plan exported for a specific product category, trading areas, and quarters. Assortment Set Version is a sequential system-generated number, representing the number of exports against a specific assortment set. Last Exported version is a system-generated number for an assortment set, used to identify the last assortment plan exported for space optimization.
Last Active Export	A Boolean measure used to indicate if there are any active exports, where the assortment space optimization results are expected.
Exported to ASO	This system-generated Boolean/flag measure is used to indicate the successful export of assortment plans for space optimization. It is not reset on successful import of optimization results.
ASO Results Imported	This Boolean flag measure is used to indicate the import of assortment space optimization results for a specific cluster and product category at least once. This measure remains checked if the imports have happened at least once.
ASO Results Accepted	This system-generated Boolean flag measure is used to indicate if the assortment space optimization results have been accepted at least once for a cluster and a product category.
WP Use ASO Results	This Boolean flag measure provides an option to choose accepted ASO results while approving an assortment. If this Boolean flag measure is checked, the accepted ASO results (in Store level - AS WP measures) are approved, otherwise, the assortment plan which was exported (in Cluster level - ACWP measures) is approved.

### Custom Menu

Use the Approve Assortment @Cluster custom menu in this view to approve the assortment. It runs the approval process in two ways:

- Approve the space optimized assortment: If the WP Use ASO Results measure is checked, it approves the assortment in the store level measures, where the space optimized assortment details are populated.
- Approve the originally exported assortment for space optimization: If the WP Use ASO Results measure is not checked, it approves the assortment at the cluster level measures.

## Finalize Assortment for Implementation Tab

This tab has one view.

### Finalize Assortment for Implementation View

Use this view to finalize the assortment for implementation. All clusters and stores, in the case of store level assortment plans, need to be approved for the assortment to be finalized for implementation. On finalization, formalization information is exported to ASO and a signal is sent to ASO to go ahead with the implementation at the stores through a space management system.

**Figure 8–68 Finalize Assortment for Implementation View**

	all [Location]	Northwest
Assort Label	Coffee - 4th Qtr, FY2014 - 4th Qtr, FY2014	Coffee - 4th Qtr, FY2014 - 4th Qtr, FY2014
Assort Set	1	1
Approved to CP	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
WP Assort Finalize	<input type="checkbox"/>	<input type="checkbox"/>
Assort Finalized	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Finalized ASO Assort Set	1	1

Table 8–57 lists the measures available in this view.

**Table 8–57 Finalize Assortment for Implementation View Measures**

Label	Description
Assort Label	The system-generated label displayed for a working plan assortment which was last exported for assortment space optimization.
Assort Finalized	Assort Set Assortment plans exported for space optimization are identified by the assortment set and corresponding version. Assortment set is a sequential system-generated number assigned to an assortment plan exported for a specific category, trading areas, and quarters. On the assortment finalization for implementation, the assortment set number is incremented by 1 for the clusters under the same trading areas.
Approved to CP	A Boolean flag measure used to indicate if an assortment has been approved.
WP Assort Finalize	A Boolean flag measure which needs to be checked before running the custom menu to finalize the assortment.

**Table 8–57 (Cont.) Finalize Assortment for Implementation View Measures**

<b>Label</b>	<b>Description</b>
Assort Finalized	A Boolean flag measure used to indicate if the assortment has been finalized.
Finalized ASO Assort Set	The assortment set number which has been finalized in ASO.
Finalized Assort Set	The assortment set which was last finalized.

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**Note:** The Finalized ASO Assort Set measure confirms finalization of the assortment in ASO. This data is made visible in the workbook by refreshing the workbook or rebuilding the workbook after the batch process has been completed in RCM and ASO.

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### **Custom Menus**

Use the Finalize Assort to ASO custom menu to finalize the assortment for implementation. Formalization information for the placeholder items, in the form of formalized items to placeholder items mapping information is sent to ASO as part of the finalization process. It also signals ASO to go ahead with the implementation of the assortment at the stores through a space management system.

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## 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 address store-specific assortment requirements. It can be helpful to plan assortments for stores which are different from the rest of the cluster in terms of business and consumer profiles, for example, Flagship stores of a retail chain.

This task also facilitates space optimization of assortment plans at the store level through integration with the Assortment and Space Optimization (ASO) solution.

This task has the following steps:

- [Assortment Setup Step](#)
- [Manage IPI Assortment Step](#)
- [Finalize Assortment for Space Optimization Step](#)
- [Import and Review ASO Results Step](#)
- [Accept ASO Results and Approve Assortment Step](#)

### Assortment Planning Analysis Workbook

This task uses the Assortment Planning Analysis workbook. For information on creating the workbook, see [Create the Assortment Planning Analysis Workbook](#) in [Chapter 7](#).

### Assortment Setup Step

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

This step has the following tabs and views:

- [Set IPI Weights Tab](#):
  1. [Review Focus Area Weights View](#)
  2. [Review Metric Weights View](#)
  3. [Review Attribute Weights View](#)
  4. [Review Attribute Value Weights View](#)
  5. [Review Consumer Segment Weights View](#)
- [Review IPI Scores Tab](#):
  1. [Review Focus Area Score View](#)

2. Review Consumer Segment Score View
3. Review IPI Score View
- Set Assortment Constraints Tab:
  1. Select Eligible and Mandatory Items View
  2. Set IPI Constraints View

## Custom Menu Options

The following custom menu options are available:

- Calc Store IPI Score
 

This custom menu option is used to calculate the IPI scores for the items at the store level based on the user-defined weights. Weights should be defined per the business requirements in the Set IPI Weights tab before running this custom menu option. The IPI scores are shown in the Review IPI Scores tab.
- Create IPI Assortment @ Store
 

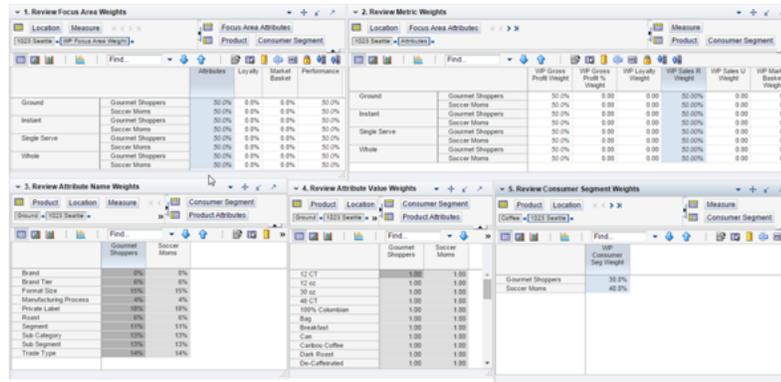
This custom menu option is used to create an IPI Assortment based on the IPI scores generated by the Calc Store IPI Score custom menu option and IPI thresholds set by the user in the Set Assortment Constraints tab.

## Set IPI Weights Tab

This tab contains views used to set the IPI weights for IPI score calculations at the store level. Once all the required IPI weights have been set, run the Calc Store IPI Score custom menu to calculate the IPI score shown in the next tab.

The following figure shows the views for this tab.

**Figure 9–1 Set IPI Weights Tab Views**



### 1. 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 9–2 1. Review Focus Area Weights View**

		Attributes	Loyalty	Market Basket	Performance
Ground	Gourmet Shoppers	50.0%	0.0%	0.0%	50.0%
	Soccer Moms	50.0%	0.0%	0.0%	50.0%
Instant	Gourmet Shoppers	50.0%	0.0%	0.0%	50.0%
	Soccer Moms	50.0%	0.0%	0.0%	50.0%
Single Serve	Gourmet Shoppers	50.0%	0.0%	0.0%	50.0%
	Soccer Moms	50.0%	0.0%	0.0%	50.0%
Whole	Gourmet Shoppers	50.0%	0.0%	0.0%	50.0%
	Soccer Moms	50.0%	0.0%	0.0%	50.0%

Table 9–1 lists the measure available in this view.

**Table 9–1 1. Review Focus Area Weights Measure**

Label	Definition
WP Focus Area Weight	The user-defined percentage weight for the focus area used in generating a system-recommended IPI assortment at the store level.

## 2. Review Metric Weights View

Use this view to review the metric weights and groupings.

**Figure 9–3 2. Review Metric Weights View**

		WP Gross Profit Weight	WP Gross Profit % Weight	WP Loyalty Weight	WP Sales R Weight	WP Sales U Weight	WP Market Basket Weight
Ground	Gourmet Shoppers	50.0%	0.00	0.00	50.00%	0.00	0.00
	Soccer Moms	50.0%	0.00	0.00	50.00%	0.00	0.00
Instant	Gourmet Shoppers	50.0%	0.00	0.00	50.00%	0.00	0.00
	Soccer Moms	50.0%	0.00	0.00	50.00%	0.00	0.00
Single Serve	Gourmet Shoppers	50.0%	0.00	0.00	50.00%	0.00	0.00
	Soccer Moms	50.0%	0.00	0.00	50.00%	0.00	0.00
Whole	Gourmet Shoppers	50.0%	0.00	0.00	50.00%	0.00	0.00
	Soccer Moms	50.0%	0.00	0.00	50.00%	0.00	0.00

Table 9–2 lists the measure available in this view.

**Table 9–2 2. Review Metric Weights Measures**

Label	Definition
WP Gross Profit Weight	The user-defined percentage weight to the WP Gross Profit R metric for the given focus area. It is used in generating an IPI score and a system-recommended IPI assortment. It is expected to be set to a non-zero value only for the Performance and/or Attributes focus area, per the default metric weights shown in Table 8–10.
WP Gross Profit % Weight	The user-defined percentage weight to the WP Gross Profit % metric for the given focus area. It is used in generating an IPI score and a system-recommended IPI assortment. It is expected to be set to a non-zero value only for the Performance and/or Attributes focus area, per the default metric weights shown in Table 8–10.

**Table 9–2 (Cont.) 2. Review Metric Weights Measures**

Label	Definition
WP Loyalty Weight	The user-defined percentage weight to loyalty metric (loyalty index) for the given focus area. It is used in generating an IPI score and a system-recommended IPI assortment. It is expected to be set to a non-zero value only for the Loyalty focus area. The Loyalty index is an externally sourced measure that represents the importance of an item, relative to other items, to the loyal customers.
WP Sales R Weight	The user-defined percentage weight given to the WP Sales R metric for the given focus area. It is used in generating an IPI score and a system-recommended IPI assortment. It is expected to be set to a non-zero value only for the Performance and/or Attributes focus area, per the default metric weights shown in <a href="#">Table 8–10</a> .
WP Sales U Weight	The user-defined percentage weight given to the WP Sales U metric for the given focus area. It is used in generating an IPI score and a system-recommended IPI assortment. It is expected to be set to a non-zero value only for the Performance and/or Attributes focus area, per the default metric weights shown in <a href="#">Table 8–10</a> .
WP Market Basket Weight	The user-defined percentage weight assigned to the Market Basket index measure for the given focus area. It is expected to be set to a non-zero value only for the Market Basket focus area. The Market Basket index is an externally sourced measure that represents the importance of an item, relative to other items, in terms of its ability to drive baskets.

### 3. Review Attribute Weights View

Use this view to review the attribute weights and groupings.

**Figure 9–4 3. Review Attribute Name Weights View**

	Gourmet Shoppers	Soccer Moms
Brand	0%	0%
Brand Tier	6%	6%
Format Size	15%	15%
Manufacturing Process	4%	4%
Private Label	18%	18%
Roast	6%	6%
Segment	11%	11%
Sub Category	13%	13%
Sub Segment	13%	13%
Trade Type	14%	14%

[Table 9–3](#) lists the measure available in this view.

**Table 9–3 3. Review Attribute Name Weights Measure**

Label	Definition
WP Attribute Name Weight	This is a user-defined numeric weight assigned to the attribute name to be used for IPI score calculations in the context of working plan assortment for the store. This helps the user to put emphasis on a particular attribute name in generating a system-recommended IPI assortment.

#### 4. Review Attribute Value Weights View

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

**Figure 9–5 4. Review Attribute Value Weights View**

	Gourmet Shoppers	Soccer Moms
12 CT	1.00	1.00
12 oz	1.00	1.00
30 oz	1.00	1.00
48 CT	1.00	1.00
100% Columbian	1.00	1.00
Bag	1.00	1.00
Breakfast	1.00	1.00
Can	1.00	1.00
Caribou Coffee	1.00	1.00
Dark Roast	1.00	1.00
De-Caffeinated	1.00	1.00
Donut House	1.00	1.00
Dunkin' Donuts	1.00	1.00
Eight O'Clock	1.00	1.00
Folgers	1.00	1.00
Free Trade	1.00	1.00
French Roast	1.00	1.00
Gevalia	1.00	1.00
Ground	1.00	1.00
Instant	1.00	1.00

Table 9–4 lists the measure available in this view.

**Table 9–4 4. Review Attribute Value Weights Measure**

Label	Definition
WP Attribute Value Weight	This is a user-defined numeric weight assigned to the attribute value to be used for IPI score calculations in the context of working plan assortment for the store. This helps the user to emphasize a particular attribute value name in generating a system-recommended IPI assortment. The default value of 1 indicates all attribute values are equally important.

#### 5. Review Consumer Segment Weights View

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

**Figure 9–6 5. Review Consumer Segment Weights View**

	WP Consumer Seg Weight
Gourmet Shoppers	30.0%
Soccer Moms	40.0%

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

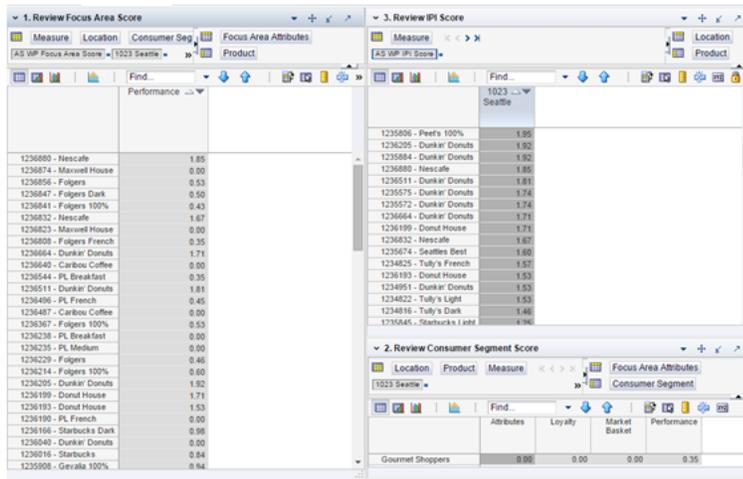
**Table 9–5 5. Review Consumer Segment Weights Measures**

Label	Definition
WP Consumer Seg Weight	The user-defined percentage weight to a consumer segment within a store. It is used to put emphasis on the target consumer segment while generating a system-recommended IPI assortment, as well as, generating Demand Transference. It can be different from WP Consumer Seg Distribution and should represent the retailer's target consumer segment distribution.
WP Consumer Seg Distribution	The distribution of different consumer segments representing sales within the store.

## Review IPI Scores Tab

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

**Figure 9–7 Review IPI Scores Tab View**



### 1. Review Focus Area Score View

Use this view to see the IPI focus area scores at the store level:

- 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.

**Figure 9–8 1. Review Focus Area Score View**

Product	Score
1236880 - Nescafe	1.85
1236874 - Maxwell House	0.00
1236856 - Folgers	0.53
1236847 - Folgers Dark	0.50
1236841 - Folgers 100%	0.43
1236832 - Nescafe	1.67
1236823 - Maxwell House	0.00
1236808 - Folgers French	0.35
1236664 - Dunkin' Donuts	1.71
1236640 - Caribou Coffee	0.00
1236544 - PL Breakfast	0.35
1236511 - Dunkin' Donuts	1.81
1236496 - PL French	0.45
1236487 - Caribou Coffee	0.00
1236367 - Folgers 100%	0.53
1236238 - PL Breakfast	0.00
1236235 - PL Medium	0.00
1236229 - Folgers	0.46

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

**Table 9–6 1. Review Focus Area IPI Scores Measure**

Label	Definition
AS WP Focus Area Score	An item's IPI score at the store level for a specific focus area.

## 2. Review Consumer Segment Score View

Use this view to see the consumer segment IPI scores at the store level. Each consumer segment score is computed per the consumer segment/trading area based on the weights of the focus areas.

**Figure 9–9 2. Review Consumer Segment Score View**

Segment	Attributes	Loyalty	Market Basket	Performance
Gourmet Shoppers	0.00	0.00	0.00	0.35

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

**Table 9–7 2. Review Consumer Segment Score Measure**

Label	Definition
AS WP Consumer Segment Score	An item's consumer segment level IPI score at the store level.

## 3. Review IPI Score View

Use this view to see the IPI scores at the store level.

**Figure 9–10 3. Review IPI Score View**

	AS WP IPI Score	AS WP IPI Rank
1235806 - Peet's 100%	1.95	1
1236205 - Dunkin' Donuts	1.92	2
1235884 - Dunkin' Donuts	1.92	2
1236880 - Nescafe	1.85	4
1236511 - Dunkin' Donuts	1.81	5
1235575 - Dunkin' Donuts	1.74	6
1235572 - Dunkin' Donuts	1.74	6
1236664 - Dunkin' Donuts	1.71	8
1236199 - Donut House	1.71	8
1236832 - Nescafe	1.67	10
1235674 - Seattles Best	1.60	11
1234825 - Tully's French	1.57	12
1236193 - Donut House	1.53	13
1234951 - Dunkin' Donuts	1.53	13
1234822 - Tully's Light	1.53	13

Table 9–8 lists the measures available in this view.

**Table 9–8 3. Review IPI Score Measures**

Label	Definition
AS WP IPI Score	An item's final IPI score in the working plan store assortment.
AS WP IPI Rank	An ordinal (sequential) rank assigned to an item in the working plan store assortment on the basis of its IPI score at the store level.

## Set Assortment Constraints Tab

Use the views under this tab:

- To select the eligible, mandatory items for the assortment at the store level.
- To set the constraints for system-recommended IPI assortments.

### 1. Select Eligible and Mandatory Items View

Use this view to set the assortment eligibility for items and select the mandatory items for assortment generation at the store level.

The Assortment Eligibility flag measure is used to define the set of items which should participate in the assortment generation process. Effectively, it is used to select the items that are eligible to be part of the assortment. The WP Mandatory flag is used to define which items must be part of the assortment.

**Figure 9–11 1. Select Eligible and Mandatory Items View**

	LY Retailer Sales @ Store R	LY Retailer Sales Rank @ Store	WP Mandatory	WP Assortment Eligibility	Assortment Eligibility Error
1234562 - Folgers Breakfast Roast Non-Flavored De-Caffeinated 12 oz Can	25369.06	57	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
1234600 - Maxwell House 100% Columbian Non-Flavored De-Caffeinated 12 oz Can	0.00	62	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
1234615 - Maxwell House Breakfast Roast Non-Flavored De-Caffeinated 12 oz Can	0.00	62	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
1234747 - Folgers 100% Columbian Non-Flavored Regular - Caffeinated 12 oz Can	38053.50	43	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
1234753 - Folgers Dark Roast Non-Flavored Regular - Caffeinated 12 oz Can	43127.28	40	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
1234759 - Folgers Medium Roast Non-Flavored Regular - Caffeinated 12 oz Can	32979.75	51	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
1234762 - Folgers Breakfast Roast Non-Flavored Regular - Caffeinated 12 oz Can	38053.50	43	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

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

**Table 9–9 1. Select Eligible and Mandatory Items Measures**

Label	Definition
LY Retailer Sales @ Store R	Last year's sales for the retailer at the store level.
LY Retailer Sales Rank	An ordinal rank assigned on the basis of the LY Retailer Sales R of an item within a product category.
WP Mandatory	A Boolean flag measure used to mark an item as mandatory in a working plan assortment.
WP Assortment Eligibility	A Boolean flag measure indicating whether an item is eligible to be part of the assortment for the retailer to stock and sell.
Assortment Eligibility Error	This read-only measure is used to present the error in case mandatory items are selected without checking their assortment eligibility flag.

## 2. Set IPI Constraints View

Use this view to define the constraints for IPI assortment generation at the store level. These are applied at the category level except IPI Thresholds which can be applied at the sub-category level. Following are the four available constraint types available:

- **SKU Count:** Use this option to create an IPI assortment for the store by defining the assortment range in the form of the WP Core SKU Count and WP Core + Optn SKU Count measures in line with the available space for the category.
- **IPI Thresholds:** Use this option to create an IPI assortment for the store by setting the IPI Cutoff Index for Core and Optional Items measure.
- **MFP Target:** Use this option to create an IPI assortment for the store, using MFP targets.
- **CP Target:** Use this option to create an IPI assortment for the store, using CP targets.

**Figure 9–12 2. Set IPI Constraints View**

	AS IPI Create IPI Assortment	AS IPI Constraint Type	AS WP Core SKU Count	AS WP Core + Optn SKU Count	WP IPI Assort Core Cutoff Index	WP IPI Assort Optn Cutoff Index	AS IPI Target Alignment	AS % of IPI Target for Optn Items	AS IPI Assort DT	AS IPI DT K/AD Input
Coffee	<input checked="" type="checkbox"/>	SKU Count	50.00	60.00	1.20	0.90	Closest	0.20	<input checked="" type="checkbox"/>	WPLY
Ground					1.20	0.90				
Instant					1.20	0.90				
Single Serve					1.20	0.90				
Whole					1.20	0.90				

Table 9–10 lists the measures available in this view.

**Table 9–10 2. Set IPI Constraints Measures**

<b>Label</b>	<b>Definition</b>
AS WP Create IPI Assortment	A Boolean measure which is required to be selected to generate a system-recommended IPI assortment towards a working plan assortment for the store.
AS IPI Constraint Type	A drop-down measure used to select the constraint type to be used to generate an IPI assortment at the store level. The drop-down options consist of SKU Count, IPI Thresholds, MFP Target, and CP Target.
AS WP Core SKU Count	The number of core items desired in an IPI assortment for the store when using the SKU Count constraint type.
AS WP Core + Optn SKU Count	The sum of the core and optional items desired in an IPI assortment for the store when using the SKU Count constraint type.
AS WP IPI Assort Core Cutoff Index	The IPI score for an eligible item to be classified as a core item in generating an IPI assortment at the store level using the IPI Thresholds constraint type.
AS WP IPI Assort Optn Cutoff Index	The IPI score for an eligible item to be classified as an optional item in generating an IPI assortment at the store level using the IPI Thresholds constraint type.
AS IPI Target Alignment	A drop-down measure used to set the alignment to the target plan measure when using the constraint types, MFP Target and CP Target, at the store level. The options in the drop-down are Over, Under, and Closest.
AS % of IPI Target for Optn Items	A percentage value defined to set the total sales retail value for the optional items over the assortment plan's sales retail value, when using the constraint types, MFP Target and CP Target, to derive the IPI assortment at the store level. This measure facilitates the creation of optional items when using the target-constrained methods of IPI assortment generation.
AS IPI Apply DT	A Boolean flag measure required to be checked if demand transference needs to be applied dynamically to calculate the assortment plan sales retail value while generating the IPI assortment at the store level. Demand Transference is applied simultaneously at every step, when items are added, one at a time, to reach the targeted assortment plan.
AS IPI DT K/A/D Input	A drop-down measure used to provide a reference assortment input for demand transference calculations in the IPI assortment generation at the store level. The drop-down options are: WP/LY (last year assortment) and WP/CP (current plan assortment).

## Manage IPI Assortment Step

Use this step to review the store-level IPI assortments and apply demand transference for further fine-tuning.

This step has the following tabs and views:

- [Review Assortment Recommendation Tab:](#)
  - 1a. [Review Assortment Recommendation @ Store View](#)
  - 1b. [Review DT Details @ Store View](#)
  3. [IPI Assortment Dashboard @ Store View](#)

## Custom Menu Options

The following custom menu options are available:

- **Apply DT to Store Assortment**

This custom menu option is used to apply demand transference to the final assortment for the store to see how sales and gross profit measures vary with changes to the assortment in the form of Add/Keep/Drop decisions. Assortment changes can be done manually by marking or unmarking the core and optional item flags. Before running this custom menu option, the user needs to select a reference assortment which the system uses to calculate the Keep/Add/Drop decisions. This reference assortment is selected in the AS DT Assort K/A/D measure which has two options in the list, WP/LY and WP/CP assortments.

- **Seed AC Core /Optional**

This custom menu option is used to seed the core and optional items in the final assortment for the store using one of the two options, IPI Store Assortment or Final Cluster Assortment. The user needs to select the respective assortment options from a drop-down selection in the AS WP Seed AC Core/Optn measure before running this custom menu. This measure contains a drop-down list of values representing the different methods of seeding a working plan store assortment with the core and optional items. The list of values has two options: IPI and final cluster level assortment. Once the drop-down selection is made, the user needs to run the Seed AC Core/Optional Recommendation custom menu. This measure is available at the sub-category level and above.

## Review Assortment Recommendation Tab

This tab has three views.

### **1a. Review Assortment Recommendation @ Store 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 9–13 1a. Review Assortment Recommendation @ Store View 1**

	1234822 - Tully's Light Roast Non-Flavored Regular - Caffeinated 12 oz Can	1234825 - Tully's French Roast Non-Flavored Regular - Caffeinated 12 oz Can	1234828 - Yuban Medium Roast Non-Flavored Regular - Caffeinated 12 oz Can	1234831 - Yuban French Roast Non-Flavored Regular - Caffeinated 12 oz Can
AS WP IPI Score	0.00	0.00	0.00	0.00
AS WP IPI Rank	1	1	1	1
AS WP Mandatory	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AS WP IPI Assort Core	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AS WP IPI Assort Optn	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AS WP IPI Assort Core Count	0.00	0.00	0.00	0.00
AS WP IPI Assort Optn Count	0.00	0.00	0.00	0.00
AS WP Assort Core	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AS WP Assort Optn	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AS Assort Core/Optn Error	1	1	0	0
AS WP Assort Core Count	0	0	0	0
AS WP Assort Optn Count	0	0	0	0
AS WP % Contribution of Category Items	0.01	0.01	0.00	0.00
AC WP Assort Core	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AC WP Assort Optn	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AC WP Assort Core Count	1	1	0	0
AC WP Assort Optn Count	0	0	0	0
AS WP Final Assort Compare to LY	Keep	Keep		
AS WP Final Assort Compare to CP	Add	Add		
AS DT Assort K/A/D Input				

Table 9–11 lists the measures available in this view.

**Table 9–11 1a. Review Assortment Recommendation @ Store View 1 Measures**

Label	Definition
AS WP IPI Score	An item's final IPI score in the working plan store assortment.
AS WP IPI Rank	An ordinal (sequential) rank assigned to an item in the working plan store assortment on the basis of its IPI score at the store level.
AS WP Mandatory for Assortment	A Boolean flag measure to be used to mark an item as mandatory in a working plan assortment for the store.
AS WP IPI Assort Core	A read-only Boolean measure indicating whether an item is a core item per the IPI calculations (in a system-recommended IPI assortment) in the working plan's assortment for the store. This measure is calculated by the system on the basis of IPI scores of items and IPI thresholds set by the user.
AS WP IPI Assort Optn	A read-only Boolean measure indicating whether an item is an optional item per the IPI calculations (in an IPI system-recommended assortment) in the working plan's assortment for the store. This measure is calculated by the system on the basis of IPI scores of items and IPI thresholds set by the user.
AS WP IPI Assort Core Count	The number of system-recommended core items per the IPI calculations (in a system-recommended IPI assortment) in the working plan's assortment for the store.
AS WP IPI Assort Optn Count	The number of system-recommended optional items per the IPI calculations (in a system-recommended IPI assortment) in the working plan's assortment for the store.
AS WP Assort Core	A Boolean flag measure indicating whether an item is a core item in the working plan assortment for the store.
AS WP Assort Optn	A Boolean flag measure indicating whether an item is an optional item in the working plan assortment for the store.

**Table 9–11 (Cont.) 1a. Review Assortment Recommendation @ Store View 1 Measures**

Label	Definition
AS Assort Core/Optn Error	Assortment Planning @ Store default 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 items in a working plan assortment for the store.
AS WP Assort Optn Count	The number of optional items in a working plan assortment for the store.
AS WP % Contribution of Category Items	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.
AC WP Assort Core	Assortment Planning @ Store Working Plan Final Assortment Core Boolean.
AC WP Assort Optn	A Boolean flag measure indicating whether an item is an optional item in the working plan’s assortment for the cluster.
AC WP Assort Core Count	The number of core items in a working plan’s assortment for the cluster.
AC WP Assort Optn Count	The number of optional items in a working plan’s assortment for the cluster.
AS WP Final Assort Compare to LY	Keep, Add, or Drop decision on comparing a store assortment with the LY store assortment.
AS WP Final Assort Compare to CP	Keep, Add, or Drop decision on comparing a store assortment with the Current Plan store assortment.

**Figure 9–14 1a. Review Assortment Recommendation @ Store View 2**

The screenshot shows a software interface titled "1a. Review Assortment Recommendation @ Store". It displays a table with four columns representing different coffee SKUs and multiple rows of performance measures. The SKUs are: 1234822 - Tully's Light Roast Non-Flavored Regular - Caffeinated 12 oz Can; 1234825 - Tully's French Roast Non-Flavored Regular - Caffeinated 12 oz Can; 1234828 - Yuban Medium Roast Non-Flavored Regular - Caffeinated 12 oz Can; and 1234831 - Yuban French Roast Non-Flavored Regular - Caffeinated 12 oz Can. The measures include assortment counts, final assortment decisions (Keep/Add), and sales/profit data for both current and previous periods.

	1234822 - Tully's Light Roast Non-Flavored Regular - Caffeinated 12 oz Can	1234825 - Tully's French Roast Non-Flavored Regular - Caffeinated 12 oz Can	1234828 - Yuban Medium Roast Non-Flavored Regular - Caffeinated 12 oz Can	1234831 - Yuban French Roast Non-Flavored Regular - Caffeinated 12 oz Can
AC WP Assort Optn	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AC WP Assort Core Count	1	1	0	0
AC WP Assort Optn Count	0	0	0	0
AS WP Final Assort Compare to LY	Keep	Keep		
AS WP Final Assort Compare to CP	Add	Add		
AS DT Assort K/A/D Input				
AS WP Use DT Sales				
AS WP Assort Sales U	18475.33	18895.24	0.00	0.00
AS WP Assort Sales R	187243.00	191498.57	0.00	0.00
AS WP DT Assort Sales U	21734.11	22268.71	0.00	0.00
AS WP DT Assort Sales R	220269.99	225687.90	0.00	0.00
AS DT No of Significant Substitute SKUs	1	1	0	0
AS WP DT Assort Substitutable Demand Sales U	5719.38	5707.06	0.00	0.00
AS WP DT Assort Substitutable Demand Sales R	57964.52	57839.62	0.00	0.00
AS WP Assort Demand Transferred %	0.26	0.26	0.00	0.00
AS WP DT Assort Incremental Demand Sales U	16014.73	16561.66	0.00	0.00
AS WP DT Assort Incremental Demand Sales R	162305.46	167848.28	0.00	0.00
AS WP Assort Gross Profit %	0.00	0.00	0.00	0.00
AS WP Assort Gross Profit R	0.00	0.00	0.00	0.00
AS WP DT Assort Gross Profit %	0.00	0.00	0.00	0.00
AS WP DT Assort Gross Profit R	0.00	0.00	0.00	0.00

Table 9–12 lists the measures available in this view.

**Table 9–12 1a. Review Assortment Recommendation @ Store View 2 Measures**

<b>Label</b>	<b>Definition</b>
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 working plan store assortment.
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	The sales retail value in the working plan's assortment for the cluster.
AS WP DT Assort Sales U	Updated (or DT affected) Demand Sales Units specifically for the working plan store assortment.
AS WP DT Assort Sales R	Updated (or DT affected) Demand Sales Retail specifically for the working plan store assortment.
AS DT No of Significant Substitute SKUs	Refers to the count of SKUs which can absorb the significant chunk of substitutable demand of a SKU in a working plan store assortment.
AS WP DT Assort Substitutable Demand Sales U	Refers to the replaceable sales units of a SKU, in case it is dropped from a working plan assortment for the store. In other words, substitutable demand sales units get transferred to the substitute SKUs in the working plan assortment for the store.
AS WP DT Assort Substitutable Demand Sales R	Refers to the respective replaceable sales retail for the substitutable sales units for a SKU in a store assortment.
AS WP Assort 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 among the substitute SKUs.
AS WP DT Assort Incremental Demand Sales U	Represents the demand units of the SKU that will be lost or not transferred to other SKUs in the planned assortment if this SKU is dropped from the assortment. It represents the true incremental sales of the SKU to the assortment.
AS WP DT Assort Incremental Demand Sales R	Represents the demand retail of the SKU that will be lost or not transferred to other SKUs in the planned assortment if this SKU is dropped from the assortment. It represents the true incremental sales of the SKU to the assortment.
AS WP Assort Gross Profit %	The gross profit percentage in a working plan assortment for the store.
AS WP Assort Gross Profit R	The gross profit retail value in a working plan assortment for the store. Gross Profit Retail is the difference between Sales Retail and Cost of Goods Sold.
AS WP DT Assort Gross Profit %	The updated (or DT Affected) demand's gross profit retail percentage value specifically for the working plan store assortment.
AS WP DT Assort Gross Profit R	The updated (or DT Affected) demand's gross profit retail percentage value specifically for the working plan store assortment.

### 1b. 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 9–15 1b. Review DT Details @ Store View**

	AS DT Assort Demand Sales Received %	AS WP DT Assort Demand Received Sales U	AS WP DT Assort Demand Received Sales R	AS WP DT Assort Sales U	AS WP DT Assort Sales R
1236205 - Dunkin' Donuts	13.55%	967.67	34897.68		
1235575 - Dunkin' Donuts	2.51%	178.95	6453.46		
1235674 - Seattles Best	1.19%	84.95	3063.73		
1234951 - Dunkin' Donuts	1.00%	71.53	2579.72		
1235884 - Dunkin' Donuts	0.86%	61.19	2206.59		
1235572 - Dunkin' Donuts	0.77%	54.85	1978.11		

Table 9–13 lists the measures available in this view.

**Table 9–13 1b. Review DT Details@ Store Measures**

Label	Definition
AS DT Assort Demand Sales Received %	Refers to the percentage of transferred sales units from the SKU dropped to the substitute SKUs in a store assortment.
AS WP DT Assort Demand Received Sales U	Refers to the sales units received by substitute SKU, from another SKU which is dropped from the store assortment. The sum of AS WP DT Assort Demand Received Sales U for substitute SKUs is equal to the demand transferred from the dropped SKU. Substitute SKUs are presented in the RHS product hierarchy.
AS WP DT Assort Demand Received Sales R	Refers to the sales retail value received by substitute SKU, from another SKU which is dropped from the store assortment. Substitute SKUs are presented in the RHS product hierarchy.
AS WP DT Assort Sales U	The demand transference affected sales units of a SKU, which is used as a reference in calculating the demand received sales figures for its substitute SKUs in a store assortment.
AS WP DT Assort Sales R	The demand transference affected sales retail value of a SKU, which is used as a reference in calculating the demand received sales figures for its substitute SKUs in a store assortment.

### 3. IPI Assortment Dashboard @ Store View

Use this view to review and compare the alignment of IPI assortment plan numbers at the store level to the set targets in the form of MFP targets and CP targets at the sub-category level and above:

- Assortment Plan numbers consist of measures presenting the Sales Retail, Sales Units, Gross Profit Retail, and Gross Profit %.
- Targets consist of MFP Sales R, MFP Sales U, MFP Gross Profit, and MFP Gross Profit %.

**Figure 9–16 3. IPI Assortment Dashboard @ Store View**

	Ground	Instant	Single Serve	Whole
MFP Gross Profit %	26%	13%	34%	24%
MFP Sales R	1622387.07	304182.08	621735.66	866891.69
AS WP Assort Gross Profit %	0%	0%	0%	0%
AS WP Assort Sales R	0.00	0.00	0.00	0.00
AS WP Assort Core Count	0	0	0	0
AS WP Mandatory Count	0.00	0.00	0.00	0.00
CP Target Gross Profit %	57%	48%	49%	51%
CP Target Sales R	2942833.11	476178.97	1089935.69	1476771.94
LY Gross Profit %	42%	30%	48%	41%
LY Sales R	2073519.47	381367.91	792775.97	1121212.44
AS LY Assort Core Count	30	6	10	15
AS WP Assort Count var to LY	-1.00	-1.00	-1.00	-1.00
AS WP Assort Gross Profit var to LY R	-1.00	-1.00	-1.00	-1.00
AS WP Assort Gross Profit var to Tgt R	-1.00	-1.00	-1.00	-1.00
AS WP Assort Gross Profit var to MFP R	-1.00	-1.00	-1.00	-1.00
AS WP Assort Sales var to LY R	-1.00	-1.00	-1.00	-1.00
AS WP Assort Sales var to Tgt R	-1.00	-1.00	-1.00	-1.00
AS WP Assort Sales var to MFP R	-1.00	-1.00	-1.00	-1.00

Table 9–14 lists the measures available in this view.

**Table 9–14 3. IPI Assortment Dashboard @ Store View Measures**

Label	Description
MFP Gross Profit %	Merchandise Financial Plan's Gross Profit percentage.
MFP Sales R	Merchandise Financial Plan's Sales Retail value.
AS WP Assort Gross Profit %	IPI Assortment's base gross profit percentage for the store.
AS WP Assort Sales R	The IPI assortment's base sales retail value for the store.
AS WP Assort Core Count	The number of core items in an IPI assortment for the store.
AS WP Mandatory Count	The number of items marked as mandatory for the store.
CP Target Gross Profit %	Approve Category Plan's Gross Profit percentage.
CP Target Sales R	Approve Category Plan's Sales Retail value.
LY Gross Profit %	Last Year's Gross Profit percentage. Similar measures in other versions include: WP Gross Profit % and CP Gross Profit %.
LY Sales R	Last Year's Sales Retail value. Similar measures in other versions include: WP Sales R and CP Sales R.
AS LY Assort Core Count	The number of core items in last year's assortment for the store. Similar measures in other versions include: CP Assort Core Count, WP Assort Core Count, and LP Assort Core Count.
AS WP Assort Count var to LY	The variance in the assortment count between the IPI assortment and last year assortment at the store level.
AS WP Assort Gross Profit var to LY R	The variance in gross profit retail between the IPI assortment and last year assortment at the store level. Similar measures available with comparison to other planning measures include: AS WP IPI Assort Gross Profit var to CP R, AS WP IPI Assort Gross Profit var to MFP R, and AS WP IPI Assort Gross Profit var to Tgt R.
AS WP IPI Assort Sales var to LY R	The variance in sales retail value between the IPI assortment and last year assortment at the store level. Similar measures available with variance to other planning measures include: AS WP IPI Assort Sales var to CP R, AS WP IPI Assort Sales var to MFP R, and AS WP IPI Assort Sales var to Tgt R.

**Table 9–14 (Cont.) 3. IPI Assortment Dashboard @ Store View Measures**

<b>Label</b>	<b>Description</b>
AS WP IPI Assort Sales var to LY U	The variance in sales units between the IPI assortment and last year assortment. Similar measures available with variance to other planning measures include: WP IPI Assort Sales var to CP U, WP IPI Assort Sales var to MFP U, and WP IPI Assort Sales var to Tgt U.
AS WP IPI DT Assort Sales var to LY U	The variance between the IPI assortment's demand transference affected sales units and last year assortment's sales units at the store level. Similar measures available with variation to other plan measures include: AS WP IPI DT Assort Sales var to CP U, AS WP IPI DT Assort Sales var to MFP U, and AS WP IPI DT Assort Sales var to Tgt U.
AS WP IPI DT Assort Gross Profit var to LY R	The variance between the IPI assortment's demand transference affected gross profit value and last year assortment's gross profit retail value at the store level. Similar measures available with variation to other plan measures include: WP IPI DT Assort Gross Profit var to CP R, WP IPI DT Assort Gross Profit var to MFP R, and WP IPI DT Assort Gross Profit var to Tgt R.
AS WP IPI DT Assort Private Label Sales var to LY U	The variance between the private label item's demand transference affected sales units in the IPI assortment and last year assortment at the store level. Similar measures available with variance to other planning measures include: AS WP IPI Assort Private Label Sales var to CP U and AS WP IPI Assort Private Label Sales var to Tgt U.
AS WP IPI DT Assort Private Label Sales var to LY R	The variance between the private label item's demand transference affected sales retail value in the IPI assortment and last year assortment at the store level. Similar measures available with variance to other planning measures include: WP IPI Assort Private Label Sales var to CP R and WP IPI Assort Private Label Sales var to Tgt R.
AS WP IPI DT Assort Private Label Gross Profit var to LY R	The variance between the private label item's demand transference affected gross profit retail values in the IPI assortment and last year assortment at the store level. Similar measures available with variance to other planning measures include: AS WP IPI Assort Private Label Gross Profit var to CP R and AS WP IPI Assort Private Label Gross Profit var to Tgt R.

## Finalize Assortment for Space Optimization 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](#)
  - [Final Assortment Dashboard @ Store View](#)
- [Export to ASO Tab:](#)
  - [1. Role Model & Assort Label View](#)
  - [2. Export to ASO @Store View](#)

## Custom Menu Options

This step has two custom menu options:

- [Export to ASO @ Store](#)

This custom menu option is used to export assortment plan details of the store to ORASE. There are two types of export options available for this custom menu option. One is to export the assortment plan details for the store with a space optimization request to ORASE. The second option is to export the assortment plan details for the store to ORASE to update it for the approved assortment for eventual implementation. See the [Review IPI Scores Tab](#).

- Export Updated Plans to ASO

This custom menu is used to export updated assortment plan numbers to ASO for an already exported assortment plan and corresponding category plan data.

- Cancel ASO Export

This custom menu can only be used to cancel exports to ASO, if the data previously exported has not been consumed by ASO from the HSA RDM due to interface issues or the assortment being in the queue for consumption. This custom menu only deletes the exported data from the RDM.

## Assortment Quantification Summary Tab

This view has two views.

### 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 such as plan measures for Sales Units, Sales R, Gross Profit, Gross Profit %, and so on.

**Figure 9–17 Assortment Quantification Summary WP/CP Measure Profile View**

	1234816 - Tully's Dark Roast Non-Flavored Regular - Caffeinated 12 oz Can	1234822 - Tully's Light Roast Non-Flavored Regular - Caffeinated 12 oz Can	1234825 - French Roast Non-Flavored Regular - Caffeinated 12 oz Can	1234828 - Yuban Medium Roast Non-Flavored Regular - Caffeinated 12 oz Can
AS CP Assort Sales R	0.00	0.00	0.00	0.00
AS CP Assort Sales U	0.00	0.00	0.00	0.00
AS CP Assort Sales AUR	0.00	0.00	0.00	0.00
AS CP Assort Gross Profit R	0.00	0.00	0.00	0.00
AS CP Assort Gross Profit %	0.00	0.00	0.00	0.00
AS WP Assort Sales R	2719278.94	1421345.96	0.00	187243.00
AS WP Assort Sales U	245035.03	107671.67	0.00	18475.33
AS WP Assort Sales AUR	11.10	13.20	0.00	10.13
AS WP Assort Gross Profit R	542360.90	292040.48	0.00	41720.07
AS WP Assort Gross Profit	0.20	0.21	0.00	0.22
AS WP Assort Sales var to	0.00	0.00	0.00	0.00
AS WP Assort Sales var to	0.00	0.00	0.00	0.00
AS WP Assort Gross Profit	0.00	0.00	0.00	0.00

Table 9–15 lists the measures available in this view.

**Table 9–15 Assortment Quantification Summary WP/CP Measure Profile Measures**

Label	Definition
AS CP Assort Sales R	The sales retail value in the current plan assortment for the store.
AS CP Assort Sales U	The sales units in the current plan assortment for the store.
AS CP Assort Sales AUR	The average unit retail value of a SKU in a current plan assortment for the store. It reflects the average selling price of a SKU at a specific product hierarchy level.
AS CP Assort Gross Profit R	The gross profit retail value in the current plan assortment for the store.
AS CP Assort Gross Profit %	The gross profit percentage in the current plan assortment for the store.

**Table 9–15 (Cont.) Assortment Quantification Summary WP/CP Measure Profile**

Label	Definition
AS WP Assort Sales R	The sales retail value in the working plan assortment for the store.
AS WP Assort Sales U	The sales units in the working plan assortment for the store.
AS WP Assort Sales AUR	The average unit retail value of a SKU in a working plan assortment for the store. It reflects the average selling price of a SKU at a specific product hierarchy level.
AS WP Assort Gross Profit R	The gross profit retail value in a working plan's assortment for the store. Gross Profit Retail is the difference between Sales Retail and Cost of Goods Sold.
AS WP Assort Gross Profit %	The gross profit percentage in a working plan's assortment for the store.
AS WP Assort Sales var to CP R	The working plan store assortment's sales retail value's variance to the same in the current plan store assortment.
AS WP Assort Sales var to CP U	The working plan store assortment's sales units variance to the same in the current plan store assortment.
AS WP Assort Gross Profit var to CP R	The working plan store assortment's gross profit value's variance to the same in the current plan store assortment.

**Figure 9–18 Assortment Quantification Summary WP/LY Measure Profile View**

Table 9–16 lists the measures available in this view.

**Table 9–16 Assortment Quantification Summary WP/LY Measure Profile Measures**

Label	Definition
AS LY Assort Sales R	Sales retail value in last year's store assortment.
AS LY Assort Sales U	Sales units in last year's store assortment.
AS LY Assort Sales AUR	Last year's actuals' average unit retail value in a store assortment. It reflects the average selling price of a SKU at a specific hierarchy level based on last year's actual assortment's sales at a store.
AS LY Assort Gross Profit R	Gross profit retail value in last year's store assortment.
AS LY Assort Gross Profit %	Gross profit percentage in last year's store assortment.

**Table 9–16 (Cont.) Assortment Quantification Summary WP/LY Measure Profile**

<b>Label</b>	<b>Definition</b>
AS WP Assort Sales R	The sales retail value in the working plan assortment for the store.
AS WP Assort Sales U	The sales units in the working plan assortment for the store.
AS WP Assort Sales AUR	The average unit retail value of a SKU in a working plan assortment at the cluster level. It reflects the average selling price of a SKU at a specific product hierarchy level.
AS WP Assort Gross Profit R	The gross profit retail value in a working plan's assortment for the cluster. Gross Profit Retail is the difference between Sales Retail and Cost of Goods Sold.
AS WP Assort Gross Profit %	The gross profit percentage in a working plan assortment for the store.
AS WP Assort Sales var to LY R	The working plan store assortment's sales retail value's variance to the same in last year's store assortment's actuals.
AS WP Assort Sales var to LY U	The working plan store assortment's sales units variance to the same in last year's store assortment's actuals.
AS WP Assort Gross Profit var to LY R	The working plan store assortment's gross profit value's variance to the same in last year's store assortment's actuals.

### Measure Profiles

This view has two measure profiles:

- WP/CP: This measure profile is used to view the working assortment at the store level in comparison to the current plan assortment.
- WP/LY: This measure profile is used to view the working assortment at the store level in comparison to the last year assortment.

### Final Assortment Dashboard @ Store View

Use this view to review and compare the alignment of the final assortment plan numbers at the store level to the set targets in the form of MFP targets and CP targets at the sub-category level and above:

- Assortment Plan numbers consist of measures presenting Sales Retail, Sales Units, Gross Profit Retail, and Gross Profit %.
- Targets consist of MFP Sales R, MFP Sales U, MFP Gross Profit, and MFP Gross Profit %.

**Figure 9–19 Final Assortment Dashboard @ Store View**

	Ground	Instant	Single Serve	Whole
MFP Gross Profit %	26%	13%	34%	24%
MFP Sales R	1622387.07	304182.08	621735.66	866891.69
AS WP Assort Gross Profit %	0%	0%	0%	0%
AS WP Assort Sales R	1421345.06	429808.11	1059625.19	238309.32
AS WP Assort Core Count	7	2	5	1
AS WP Mandatory Count	0.00	0.00	0.00	0.00
CP Target Gross Profit %	57%	48%	49%	51%
CP Target Sales R	2942833.11	476178.97	1089935.69	1476771.94
LY Gross Profit %	42%	30%	48%	41%
LY Sales R	2073519.47	381367.91	792775.97	1121212.44
AS LY Assort Core Count	30	6	10	15
AS WP Assort Count var to LY R	-0.77	-0.67	-0.50	-0.93
AS WP Assort Gross Profit var to LY R	-1.00	-1.00	-1.00	-1.00
AS WP Assort Gross Profit var to CP R	-1.00	-1.00	-1.00	-1.00
AS WP Assort Gross Profit var to MFP R	-1.00	-1.00	-1.00	-1.00
AS WP Assort Sales var to LY R	-0.31	0.13	0.34	-0.79
AS WP Assort Sales var to CP R	-0.52	-0.10	-0.03	-0.84
AS WP Assort Sales var to Tgt R	-0.12	0.41	0.70	-0.73

Table 9–17 lists the measures available in this view.

**Table 9–17 Final Assortment Dashboard @ Store View Measures**

Label	Description
MFP Gross Profit %	Merchandise Financial Plan's Gross Profit percentage.
MFP Sales R	Merchandise Financial Plan's Sales Retail value.
AS WP Assort Gross Profit %	The working plan assortment's gross profit percentage for the store.
AS WP Assort Sales R	The working plan assortment's sales retail value.
AS WP Assort Core Count	The number of core items in the working plan assortment for the store.
AS WP Mandatory Count	The number of items marked as mandatory for the store.
CP Target Gross Profit %	Approve Category Plan's Gross Profit percentage.
CP Target Sales R	Approve Category Plan's Sales Retail value.
LY Gross Profit %	Last Year's Gross Profit percentage. Similar measures in other versions include: WP Gross Profit % and CP Gross Profit %.
LY Sales R	Last Year's Sales Retail value. Similar measures in other versions include: WP Sales R and CP Sales R.
AS LY Assort Core Count	The number of core items in last year's assortment for the store. Similar measures in other versions include: AS CP Assort Core Count, AS WP Assort Core Count, and AS LP Assort Core Count.
AS WP Assort Count var to LY R	The variances in assortment count between the working plan assortment and last year assortment at the store level.
AS WP Assort Gross Profit var to LY R	The variance in gross profit retail between the working plan assortment and last year assortment at the store level. Similar measures available with comparison to other planning measures: AS WP Assort Gross Profit var to CP R, AS WP Assort Gross Profit var to MFP R, and AS WP Assort Gross Profit var to Tgt R.
AS WP Assort Sales var to LY R	The variances in sales retail value between the working plan assortment and last year assortment. Similar measures available with variance to other planning measures: WP Assort Sales var to CP R, WP Assort Sales var to MFP R, and WP Assort Sales var to Tgt R.

**Table 9–17 (Cont.) Final Assortment Dashboard @ Store View Measures**

Label	Description
AS WP Assort Sales var to LY U	The variance in sales units between the working plan assortment and last year assortment at the store level. Similar measures available with variance to other planning measures: AS WP Assort Sales var to CP U, AS WP Assort Sales var to MFP U, and AS WP Assort Sales var to Tgt U.
WP DT Assort Sales var to LY U	The variance between the store level working plan assortment's demand transference affected sales units and store level last year assortment's sales units. Similar measures available with variation to other plan measures: AS WP DT Assort Sales var to CP U, AS WP DT Assort Sales var to MFP U, and AS WP DT Assort Sales var to Tgt U.
WP DT Assort Sales var to LY R	The variance between the store level working plan assortment's demand transference affected sales retail value and store level last year assortment's sales retail value. Similar measures available with variation to other plan measures: AS WP DT Assort Sales var to CP R, AS WP DT Assort Sales var to MFP R, and AS WP DT Assort Sales var to Tgt R.
WP DT Assort Gross Profit var to LY R	The variance between the IPI assortment's demand transference affected sales retail value and last year assortment's sales retail value. Similar measures available with variation to other plan measures: WP IPI DT Assort Gross Profit var to CP R, WP IPI DT Assort Gross Profit var to MFP R, and WP IPI DT Assort Gross Profit var to Tgt R.

## Export to ASO Tab

This view has two views used to fulfill the requirements of exporting assortment plan and category plan data to ASO at the store level.

Exported assortment plans are optimized in ASO to the available space and recommendations are sent back to RCM.

HSA is used to provide a near real-time round-trip integration between RCM and ASO. The Oracle database schema, RDM, is used to store data being exchanged between RCM and ASO.

Import from ASO into RCM is done in the next step, Import and Review ASO Results.

### 1. Role Model & Assort Label View

Use this view to select the role assignment model to the categories that needs to be exported to ASO at the store level.

**Figure 9–20 1. Role Model & Assort Label View**

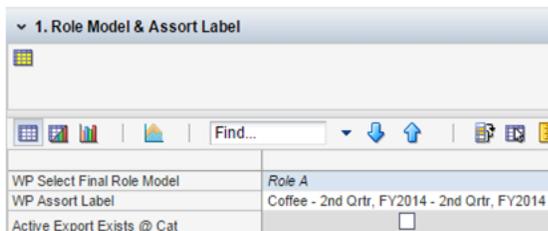


Table 9–18 lists the measures available in this view.

**Table 9–18 1. Role Model & Assort Label Measures**

Label	Definition
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, Model A and Model B.
WP Assort Label	The label displayed for an assortment based on things such as trading area, category, or consumer segment.
Active Export Exists @Cat	This read-only Boolean measure indicates if there are any active exports present for the category, where the ASO results are expected back. ASO can only accept one export for a category at a time.

## 2. Export to ASO @Store View

Use this view to select the stores for which the assortment plan and category plan data needs to be exported to ASO for space optimization. Check the AS WP Export to ASO flag measure for the stores and run the Export to ASO @Store custom menu.

**Figure 9–21 2. Export to ASO @Store View**

	AS WP Export to ASO	AS ASO Export Status	AS Last Exported Ver	AS Active Export Exists	AS Last Exported Date	AS WP Export Updated Plan	AS ASO Results Imported	AS ASO Results Accepted
1023 Seattle	<input type="checkbox"/>		0	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>
1024 Portland	<input type="checkbox"/>		0	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>
1025 Boise	<input checked="" type="checkbox"/>		0	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>
1026 Billings	<input type="checkbox"/>		0	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>
1027 Denver	<input type="checkbox"/>		0	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>
1028 Salt Lake City	<input type="checkbox"/>		0	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>
1029 Eugene	<input type="checkbox"/>		0	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>
1030 Salem	<input type="checkbox"/>		0	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>

Table 9–19 lists the measures available in this view.

**Table 9–19 2. Export to ASO @Store Measures**

Label	Definition
AS WP Export to ASO	A Boolean flag measure at the store level which needs to be checked before running the Export to ASO @Store custom menu.
AS ASO Export Status	This read-only measure is used at the store level to display the status of exports to ASO.
AS Last Exported Ver	Assortment plans exported for space optimization are identified by the assortment set and corresponding version. Assortment set is a sequential system-generated number assigned to an assortment plan exported for a specific product category, trading areas, and quarters. Assortment Set Version is a sequential system-generated number, representing the number of exports against a specific assortment set. The AS Last Exported version is a system-generated number for an assortment set, used to identify the last assortment plan exported for space optimization at the store level.

**Table 9–19 (Cont.) 2. Export to ASO @Store Measures**

<b>Label</b>	<b>Definition</b>
AS Active Exports Exists	This system-generated Boolean flag measure is used at the store level to identify the presence of any active exports for assortment space optimization for a product category, clusters, and stores under trading areas for which the optimization results are yet to be imported.
AS Last Exported Date	The date on which an assortment plan at the store level was exported for assortment space optimization for the given trading areas, quarters, and product category.
AS WP Export Updated Plan	This Boolean flag measure needs to be checked to export updated or changed assortment plan numbers for an already exported assortment plan for space optimization at the store. The Export Updated Plan custom menu is used to do this export after checking this flag measure.
AS ASO Results Imported	This Boolean flag measure is used to indicate the import of assortment space optimization results for a specific store and product category at least once. This measure remains checked if the import has happened at least once.
AS ASO Results Accepted	This system-generated Boolean flag measure is used to indicate if the assortment space optimization results have been accepted at least once for a store and product category.
Assort Set	Assortment plans exported for space optimization are identified by the assortment set and corresponding version. Assortment set is a sequential system-generated number assigned to an assortment plan exported for a specific category, trading areas, and quarters. On the assortment finalization for implementation, the assortment set number is incremented by 1 for the stores under the same trading areas.
AS Exported to ASO	This system-generated Boolean flag measure is used to indicate the successful export of assortment plans for space optimization for a store. It is not reset on the successful import of optimization results.
AS WP Cancel ASO Export	This flag measure needs to be checked to delete the previous exports stored in RDM tables at the store level by running the Cancel ASO Export custom menu.
AS Assort Label	The system-generated label displayed for a working plan assortment which was last exported for assortment space optimization at the store level.
Assort ID	The system-generated assortment ID for the exported assortment plan for space optimization at the store level. It is a concatenation of the internal product category ID, quarter, and year for identifying an assortment set.
AS Last Exported ID	The system-generated assortment ID for the last exported assortment plan for space optimization at the store level. It is a concatenation of the internal product category ID, quarter, and year for identifying an assortment set.

## Import and Review ASO Results Step

The process of space optimization of an assortment at the store level is similar to that at the cluster level and consists of the following actions:

1. Export the store level assortment with a space optimization request.
2. Import the ASO results at the store level after assortment space optimization in ASO.

3. Review and compare the ASO results with the exported assortment and other versions of the assortment such as, LY, CP and LP.
4. Accept the ASO results and review the space optimized assortment.
5. Formalize the placeholder items in the assortment.
6. Approve the space optimized assortment and finalize it for implementation.

Use this step to review and import ASO results, location-wise or space-wise, and compare them against the exported assortment plan and other versions of the assortment plan.

The previously exported assortment plan is space optimized in ASO and then the ASO recommended assortment, assortment plan, and space productivity information are exported back to RCM. Once the exports are available from ASO, a custom menu is run to import the available ASO results.

Space productivity information is comprised of parameters such as, average service levels, stock cover in number of days, allocated space (number of facings, facings length), and so on.

**Prior to starting this step:**

- The assortment plan should have been exported to ASO with a space optimization request.
- Space optimization for the exported assortment plan should be complete in ASO and the ASO results should have been exported back to RCM.

**After completing this step:**

If ASO results are meeting the expectations then proceed to the next step - Accept and Approve ASO Results.

This step has the following tabs and views:

- [Import and Review ASO Results Tab](#):
  1. [Import ASO Results @ Store View](#)
  2. [ASO Assortment @ Store Summary View](#)
  3. [ASO Assortment Details and Space Productivity @ Store View](#)

## Custom Menu Option

This step has one custom menu option.

### Import ASO Results

This custom menu is used to import the ASO results consisting of the recommended assortment, assortment plan, and space productivity information.

## Import and Review ASO Results Tab

This tab has three views.

### 1. Import ASO Results @ Store View

Use this view to import the assortment space optimization results from ASO. Check the AS WP ASO Import flag measure at the all locations level and run the Import ASO Results custom menu. This imports all the available and relevant space optimization results from ASO. Relevant optimization results are for the stores where active exports

for assortment space optimization exist. The AS WP ASO Import flag measure is reset once the imports are completed successfully and the corresponding positions for the AS ASO Import Status flag measure are updated.

**Figure 9–22 1. Import ASO Results @ Store View**

	AS Assort Label	AS Last Exported Ver	AS Active Export Exists	AS Last Exported Date	AS WP ASO Import	AS ASO Import Status
1023 Seattle		0	<input type="checkbox"/>			ASO Data Imported
1024 Portland		0	<input type="checkbox"/>			ASO Data Imported
1025 Boise		0	<input type="checkbox"/>			ASO Data Imported
1026 Billings		0	<input type="checkbox"/>			
1027 Denver		0	<input type="checkbox"/>			
1028 Salt Lake City		0	<input type="checkbox"/>			
1029 Eugene		0	<input type="checkbox"/>			
1030 Salem		0	<input type="checkbox"/>			

Table 9–20 lists the measures available in this view.

**Table 9–20 1. Import ASO Results @ Store View Measures**

Label	Description
AS Assort Label	The system-generated label displayed for a working plan assortment which was last exported for assortment space optimization at the store level.
AS Last Exported Ver	Assortment plans exported for space optimization are identified by the assortment set and the corresponding version. Assortment set is a sequential system-generated number assigned to an assortment plan exported for a specific product category, trading areas, and quarters. Assortment Set Version is a sequential system-generated number, representing the number of exports against a specific assortment set. The AS Last Exported version is a system-generated number for an assortment set, used to identify the last assortment plan exported for space optimization at the store level.
AS Active Export Exists	This system-generated Boolean flag measure is used at the store level to identify the presence of any active exports for assortment space optimization for a product category, clusters, and stores under trading areas, for which the optimization results are yet to be imported.
AS Last Exported Date	The date on which an assortment plan at the store level was last exported for assortment space optimization for the given trading areas, quarters, and product category.
AS WP ASO Import	This user-entered Boolean flag measure is used to trigger the import of assortment space optimization results at the store level. This measure can be checked at the all locations level to import all the relevant (where active exports exist) and available optimization results for the workbook. Once the import is completed, this flag measure is reset.
AS ASO Import Status	This system-generated measure is used to indicate the successful import of assortment space optimization results for a specific store and product category. It is also used to present a warning message in the case of removal of a mandatory item in the space optimization results.

**Table 9–20 (Cont.) 1. Import ASO Results @ Store View Measures**

<b>Label</b>	<b>Description</b>
AS ASO Results Imported	This Boolean flag measure is used to indicate the import of assortment space optimization results for a specific store and product category at least once. This measure remains checked, if the import have happened at least once.
AS ASO Results Imported Date	The date on which the assortment space optimization results were imported for a store under a trading area.
AS ASO Results Accepted	This system-generated Boolean flag measure is used to indicate if the assortment space optimization results have been accepted at least once for a store and product category.
AS Exported to ASO	This system-generated Boolean flag measure is used to indicate the successful export of assortment plans for space optimization for a store. It is not reset on successful import of optimization results.
Assort Set	Assortment plans exported for space optimization are identified by the assortment set and corresponding version. Assortment set is a sequential system-generated number assigned to an assortment plan exported for a specific category, trading areas, and quarters. On the assortment finalization for implementation, the assortment set number is incremented by 1 for the clusters under the same trading areas.
AS ASO Results Accepted By	The user who accepted the assortment space optimization results for the store.
AS ASO Results Accepted Date	The date on which the assortment space optimization results were accepted for the store.
AS Last Exported By	The user who last exported an assortment plan for space optimization for the store.
AS Last Exported ID	System-generated assortment ID for the last exported assortment plan for space optimization at the store level. It is a concatenation of the internal product category ID, quarter, and year for identifying an assortment set.
AS ASO Results Imported By	The user who last imported the assortment space optimization results at the store level.

### **Custom Menu**

Use the Import ASO Results custom menu in this view to import the space optimization results from ASO comprised of the ASO recommended assortment, assortment plan, and space productivity information. The ASO results are available at the SKU/Store level. The AS WP ASO Import measure needs to be checked at the all locations level to run this custom menu.

### **2. ASO Assortment @ Store Summary View**

Use this view to review and compare the summary of ASO recommended results with the exported working plan assortment plan (WP) for space optimization, current plan, and last year assortment plan at the store level.

The ASO recommended assortment plan is available only at the SKU/Store level.

**Figure 9–23 2. ASO Assortment @ Store Summary View**

	Ground	Instant	Single Serve	Whole
AS WP Mandatory Count	0.00	0.00	0.00	0.00
AS WP Assort Core Count	10	3	2	4
AS WP Assort Optn Count	0	0	0	0
AS WP Assort Sales U	52429.57	15002.09	5475.28	28302.47
AS WP Assort Sales R	493499.67	154691.23	37617.18	259371.85
AS WP Assort Gross Profit R	212287.11	59272.10	11504.40	125039.72
AS WP Assort Gross Profit %	0.43	0.38	0.31	0.48
ASO Assort Store Core Count	10	3	2	4
ASO Assort Sales U	52,430	15,002	5,475	28,302
ASO Assort Sales R	493.5 K	154.7 K	37.6 K	259.4 K
ASO Assort Gross Profit R	212.3 K	59.3 K	11.5 K	125.0 K
ASO Assort Gross Profit %	43.0 %	38.3 %	30.6 %	48.2 %
AS LY Mandatory Count	0.00	0.00	0.00	0.00
AS LY Assort Core Count	61	30	6	10
AS LY Assort Optn Count	0	0	0	0
AS LY Assort Sales U	224333.67	96773.32	31976.12	43147.64
AS LY Assort Sales R	2549889.66	1206083.38	219687.03	467818.97
AS LY Assort Gross Profit R	1074892.52	512187.93	66521.39	224834.01
AS LY Assort Gross Profit %	0.42	0.42	0.30	0.48

Table 9–21 lists the measures available in this view.

**Table 9–21 2. ASO Assortment @ Store Summary View Measures**

Label	Description
AS WP Mandatory Count	The number of mandatory items in a working plan assortment for the store. Similar measures in other versions include: AS LY Mandatory Count, AS CP Mandatory Count, and AS LP Mandatory Count.
AS WP Assort Core Count	The number of core items in a working plan assortment for the store. Similar measures in other versions include: AS LY Assort Core Count, AS CP Assort Core Count, and AS LP Assort Core Count.
AS WP Assort Optn Count	The number of optional items in a working plan assortment at the store. Similar measures in other versions include: AS LY Assort Optn Count, AS CP Assort Optn Count, and AS LP Assort Optn Count.
AS WP Assort Sales U	The sales units in the working plan assortment for the store. Similar measures in other versions include: AS LY Assort Sales U and AS CP Assort Sales U.
AS WP Assort Sales R	The sales retail value in the working plan assortment for the store. Similar measure in other versions: AS LY Assort Sales R and AS CP Assort Sales R.
AS WP Assort Gross Profit R	The gross profit retail value in a working plan assortment for the store. Gross Profit Retail is the difference between Sales Retail and Cost of Goods Sold. Similar measures in other versions include: AS LY Assort Gross Profit R and AS CP Assort Gross Profit R
AS WP Assort Gross Profit %	The gross profit percentage in a working plan assortment for the store. Similar measures in other versions include: AS LY Assort Gross Profit % and AS CP Assort Gross Profit %.
ASO Assort Store Core Count	The number of core items in a store in an ASO recommended assortment. Note that the ASO results (recommendations) data is available at the SKU/Store level.
ASO Assort Sales U	The sales units in an ASO recommended assortment. Note that the ASO results (recommendations) data is available at the SKU/Store level.

**Table 9–21 (Cont.) 2. ASO Assortment @ Store Summary View Measures**

<b>Label</b>	<b>Description</b>
ASO Assort Sales R	The sales retail value in an ASO recommended assortment. Note that the ASO results (recommendations) data is available at the SKU/Store level.
ASO Assort Gross Profit R	The gross profit retail value in an ASO recommended assortment. Note that the ASO results (recommendations) data is available at the SKU/Store level.
ASO Assort Gross Profit %	The gross profit retail percentage in an ASO recommended assortment. Note that the ASO results (recommendations) data is available at the SKU/Store level.
AS WP Assort Carried	A Boolean flag measure indicating whether an item is part of the working plan assortment for the store. Core items are part of the assortment. Similar measures in other versions include: AS LY Assort Carried, AS CP Assort Carried, and AS LP Assort Carried.
AS WP Assort Core	A Boolean flag measure indicating whether an item is a core item in the working plan assortment for the store. Similar measures in other versions include: AS LY Assort Core, AS CP Assort Core, and AS LP Assort Core.
AS WP Mandatory	A Boolean flag measure used to mark an item as mandatory in a working plan assortment for the store.

### Measure Profiles

ASO Assortment Summary @Store view is used to review and compare the ASO results in relation to the exported assortment in particular and other version assortments at the store level.

WP/CP: This profile is used to compare the ASO results summary in relation to the exported working plan assortment and current plan assortment at the store level.

WP/LP: This profile is used to compare the ASO results summary in relation to the exported working plan assortment and last plan assortment at the store level.

WP/LY: This profile presents a comparison of the ASO results summary in relation to the exported working plan assortment and last year's assortment plan at the store level.

### 3. ASO Assortment Details and Space Productivity @ Store View

Use this view to review and compare the details of the ASO results comprised of the ASO recommended assortment, plan and space productivity information, with the exported working plan assortment, and other versions (LY, LP, and CP) at the store level, along with their space productivity information. This view is viewed at the store level.

**Figure 9–24 3. ASO Assortment @ Store Details and Space Productivity View**

	Coffee	Ground	Instant	Single Serve	Whole
AS WP Assort Carried	<input checked="" type="checkbox"/>				
AS WP Mandatory	<input type="checkbox"/>				
AS WP Mandatory Count	0.00	0.00	0.00	0.00	0.00
AS WP Assort Core	<input checked="" type="checkbox"/>				
AS WP Assort Core Count	10	3	2	4	1
AS WP Assort Optn	<input type="checkbox"/>				
AS WP Assort Optn Count	0	0	0	0	0
AS WP Assort Sales U	52429.57	15002.09	5475.28	28302.47	3649.74
AS WP Assort Sales R	493499.67	154691.23	37617.18	259371.85	41819.41
AS WP Assort Gross Profit R	212287.11	59272.10	11504.40	125039.72	16470.90
AS WP Assort Gross Profit %	0.43	0.38	0.31	0.48	0.39
ASO Assort Store Core Count	10	3	2	4	1
WP ASO Assort Facings Length	34,944	17,664	3,072	5,760	8,448
WP ASO Assort # Facings	46	15	10	16	5
WP ASO Assort Avg Service Level	6.71	3.85	6.26	23.10	1.69
ASO Assort Sales R per Linear Unit	14.12	8.76	12.25	45.03	4.95
ASO Assort Sales R per facing	10,728.25	10,312.75	3,761.72	16,210.74	8,363.88
ASO Assort Gross Profit R per Linear Unit	6.08	3.36	3.74	21.71	1.95
ASO Assort Gross Profit R per facing	4,614.94	3,951.47	1,150.44	7,814.98	3,294.18
ASO Assort Sales U	52,430	15,002	5,475	28,302	3,650
ASO Assort Sales R	493.5 K	154.7 K	37.6 K	259.4 K	41.8 K
ASO Assort Gross Profit R	212.3 K	59.3 K	11.5 K	125.0 K	16.5 K
ASO Assort Gross Profit %	43.0 %	38.3 %	30.6 %	48.2 %	39.4 %
AS LY Assort Carried	<input checked="" type="checkbox"/>				
AS LY Mandatory	<input type="checkbox"/>				
AS LY Mandatory Count	0.00	0.00	0.00	0.00	0.00
AS LY Assort Core	<input checked="" type="checkbox"/>				
AS LY Assort Core Count	61	30	6	10	15

Table 9–22 lists the measures available in this view.

**Table 9–22 3. ASO Assortment @ Store Details and Space Productivity View Measures**

Label	Description
AS WP Assort Carried	A Boolean flag measure indicating whether an item is part of the working plan assortment for the store. Core items are part of the assortment. Similar measures in other versions include: AS LY Assort Carried, AS CP Assort Carried, and AS LP Assort Carried.
AS WP Mandatory	A Boolean flag measure used to mark an item as mandatory in a working plan assortment for the store.
AS WP Mandatory Count	The number of mandatory items in a working plan assortment for the store. Similar measures in other versions include: AS LY Mandatory Count, AS CP Mandatory Count, and AS LP Mandatory Count.
AS WP Assort Core	A Boolean flag measure indicating whether an item is a core item in the working plan assortment for the store. Similar measures in other versions include: AS LY Assort Core, AS CP Assort Core, and AS LP Assort Core.
AS WP Assort Core Count	The number of core items in a working plan assortment for the store. Similar measures in other versions include: AS LY Assort Core Count, AS CP Assort Core Count, AS LP Assort Core Count.
AS WP Assort Optn	A Boolean flag measure indicating whether an item is an optional item in the working plan's assortment for the store. Similar measures in other versions include: AS LY Assort Optn, AS CP Assort Optn, and AS LP Assort Optn.
AS WP Assort Optn Count	The number of optional items in a working plan assortment at the store. Similar measures in other versions include: AS LY Assort Optn Count, AS CP Assort Optn Count, and AS LP Assort Optn Count.
AS WP Assort Sales U	The sales units in the working plan assortment for the store. Similar measures in other versions include: AS LY Assort Sales U and AS CP Assort Sales U.

**Table 9–22 (Cont.) 3. ASO Assortment @ Store Details and Space Productivity View**

<b>Label</b>	<b>Description</b>
AS WP Assort Sales R	The sales retail value in the working plan assortment for the store. Similar measure in other versions include: AS LY Assort Sales R and AS CP Assort Sales R.
AS WP Assort Gross Profit R	The gross profit retail value in a working plan assortment for the store. Gross Profit Retail is the difference between Sales Retail and Cost of Goods Sold. Similar measures in other versions include: AS LY Assort Gross Profit R and AS CP Assort Gross Profit R.
AS WP Assort Gross Profit %	The gross profit percentage in a working plan assortment for the store. Similar measures in other versions include: AS LY Assort Gross Profit % and AS CP Assort Gross Profit %.
ASO Assort Store Core Count	The number of core items in a store in an ASO recommended assortment. Note that the ASO results (recommendations) data is available at the SKU/Store level.
WP ASO Assort Facings Length	The length of the number of facings allotted to a SKU in the POGs in a store layout after the working plan assortment's space optimization by ASO. This measure is an output from ASO at the SKU/Store level. Similar measures in different versions include: LY ASO Assort Facings Length, CP ASO Assort Facings Length, and LP ASO Assort Facings Length.
WP ASO Assort # Facings	The number of facings allotted to a SKU in the POGs in a store layout after the working plan assortment's space optimization by ASO. This measure is an output from ASO at the SKU/Store level. Similar measures in different versions include: LY ASO Assort # Facings, CP ASO Assort # Facings, and LP ASO Assort # Facings.
WP ASO Assort Avg Service Level	The average service level that represents the probability of an item's availability at a store in the working plan assortment. This measure is an output from ASO at the SKU/Store level. Similar measure in different versions include: LY ASO Assort Avg Service Level, CP ASO Assort Avg Service Level, and LP ASO Assort Avg Service Level.
WP ASO Assort Avg Days of Supply	The inventory or stock cover measured as the average number of days of inventory supply present at the store at any given time during the planning period. This measure is an output from ASO at the SKU/Store level. Similar measure in different versions include: LY ASO Assort Avg Days of Supply, CP ASO Assort Avg Days of Supply, and LP ASO Assort Avg Days of Supply.
ASO Assort Sales R per Linear Unit	The sales retail value return per linear unit of facings length in the ASO recommended assortment.
ASO Assort Sales R per facing	The sales retail value return per facing in the ASO recommended assortment.
ASO Assort Gross Profit R per Linear Unit	The gross profit retail value return per linear unit in the ASO recommended assortment.
ASO Assort Gross Profit R per facing	The gross profit retail value return per facing in the ASO recommended assortment.
ASO Assort Sales U	The sales units in an ASO recommended assortment. Note that the ASO results (recommendations) data is available at the SKU/Store level.
ASO Assort Sales R	The sales retail value in an ASO recommended assortment. Note that the ASO results (recommendations) data is available at the SKU/Store level.

**Table 9–22 (Cont.) 3. ASO Assortment @ Store Details and Space Productivity View**

<b>Label</b>	<b>Description</b>
ASO Assort Gross Profit R	The gross profit retail value in an ASO recommended assortment. Note that the ASO results (recommendations) data is available at the SKU/Store level.
ASO Assort Gross Profit %	The gross profit retail percentage in an ASO recommended assortment. Note that the ASO results (recommendations) data is available at the SKU/Store level.

**Measure Profiles**

The ASO Assortment @Store Details and Space Productivity view is used to review the details of the ASO results in the form of assortment plan and space productivity information at the store level.

WP/CP: This measure profile presents a comparison of the ASO assortment plan details and space productivity information in relation to the exported working plan assortment and current plan assortment at the store level.

WP/LP: This measure profile presents a comparison of the ASO assortment plan details and space productivity information in relation to the exported working plan assortment and last plan assortment at the store level.

WP/LY: This measure profile presents a comparison of the ASO assortment plan details and space productivity information in relation to the working plan assortment and last year's assortment plan at the store level.

**Accept ASO Results and Approve Assortment Step**

Use this step to accept the ASO results, review the space optimized assortment, approve it, and finalize it for implementation.

**Prior to starting this step:**

The ASO results should have been imported and reviewed in the previous step.

**After completing this step:**

The space-optimized assortments are finalized for implementation under this step.

This step has the following tabs and views:

- [Accept ASO Results and Finalize Assortment Tab:](#)
  1. [Accept ASO Results @ Store View](#)
  2. [Review Space Optimized Assortment @ Store View](#)
- [Approve Assortment Tab:](#)
  - [Approve Assortment @ Store View](#)
- [Finalize Assortment for Implementation Tab:](#)
  - [Finalize Assortment for Implementation View](#)

**Custom Menu Options**

This step has the following custom menu options:

### Accept ASO Results

This custom menu is used to accept the ASO results after importing and reviewing them.

### Approve Assortment @Store

This custom menu is used approve an assortment at the store level.

### Finalize Assort to ASO

This custom menu is used to finalize the assortment for space optimization.

## Accept ASO Results and Finalize Assortment Tab

This tab has two views.

### 1. Accept ASO Results @ Store View

Use this view to accept the ASO results, which have been reviewed in the previous step and been found to be in line with the business requirements. Review the stores for which the ASO results have been imported. Check the AS WP Accept flag measure for stores, where the ASO results need to be accepted, choose the required option in the WP Accept Type measure from the drop-down selection, and run the Accept ASO Results custom menu. The following options are available for accepting ASO results:

- ASO Assortment and Plan: This option is used to copy the ASO recommended assortment plan, as it is, into the store level measures.
- ASO Assortment only: This option is used to copy only the product-mix or assortment from the ASO results. The assortment plan numbers are derived by applying demand transference for the difference between the original working plan exported at the store level for space optimization and the ASO recommended assortment.

**Figure 9–25 1. Accept ASO Results @ Store View**

Table 9–23 lists the measures available in this view.

**Table 9–23 1. Accept ASO Results @ Store View Measures**

Label	Description
AS Assort Label	The system-generated label displayed for a working plan assortment which was last exported for assortment space optimization at the store level.

**Table 9–23 (Cont.) 1. Accept ASO Results @ Store View Measures**

<b>Label</b>	<b>Description</b>
AS Last Exported Ver	Assortment plans exported for space optimization are identified by the assortment set and corresponding version. Assortment set is a sequential system-generated number assigned to an assortment plan exported for a specific product category, trading areas, and quarters. Assortment Set Version is a sequential system-generated number, representing the number of exports against a specific assortment set. AS Last Exported version is a system-generated number for an assortment set, used to identify the last assortment plan exported for space optimization at the store level.
AS Active Export Exists	This system-generated Boolean flag measure is used at the store level to identify the presence of any active exports for assortment space optimization for a product category, clusters, and stores under trading areas, for which the optimization results are yet to be imported.
AS Exported to ASO	This system-generated Boolean flag measure is used to indicate the successful export of assortment plans for space optimization for a store. It is not reset on the successful import of optimization results.
AS Last Exported Date	The date on which an assortment plan at the store level was last exported for assortment space optimization for the given trading areas, quarters, and product category.
AS ASO Results Imported	This Boolean flag measure is used to indicate the import of assortment space optimization results for a specific store and product category, at least once. This measure remains checked if the imports have happened at least once.
AS ASO Results Imported Date	The date on which the assortment space optimization results were imported for a store under a trading area.
AS WP Accept	A Boolean flag measure that needs to be checked for a store to run the Accept ASO Results custom menu.
AS WP Accept Type	A drop-down measure used to enter the accept type before running the Accept ASO Results custom menu at the store level. There are two available options: <ul style="list-style-type: none"> <li>■ ASO Assortment only: Used to accept only the ASO assortment recommendation.</li> <li>■ ASO Assortment and Plan: Used to accept both the ASO assortment and plan recommendations.</li> </ul>
AS ASO Results Accepted	A Boolean measure used to indicate if the ASO results have been accepted for a store.
AS ASO Results Accepted Date	The date on which the ASO results were accepted at the store level.

### Custom Menus

Use the Accept ASO Results custom menu to accept the ASO results. The ASO results can be accepted in two ways by selecting an option from the AS WP Accept Type measure:

- ASO Assortment and Plan: This option is used to copy the ASO recommended assortment plan, as it is, into the store level measures.
- ASO Assortment only: This option is used to copy only the product-mix or assortment from the ASO results. The assortment plan numbers are derived by

applying demand transference for the difference between the original working plan exported for space optimization and the ASO recommended assortment.

## 2. Review Space Optimized Assortment @ Store View

Use this view to review the space-optimized assortment and its space productivity information at the store level after accepting the ASO results. Compare it with different versions of the assortment plans such as, LY, CP, and LP.

The ASO results are available at the SKU/Store level and, on acceptance, are stored in the store level measures (AS WP type measures). The accepted ASO recommended assortment is referred to as the space-optimized assortment. Space productivity information is also updated to the working plan measures as part of the acceptance of the ASO results.

**Figure 9–26 2. Review Space Optimized Assortment @ Store View**

	Coffee	Ground	Instant	Single Serve	Whole
AS WP Assort Carried	<input checked="" type="checkbox"/>				
AS WP Mandatory	<input type="checkbox"/>				
AS WP Mandatory Count	0	0	0	0	0
AS WP Assort Core	<input checked="" type="checkbox"/>				
AS WP Assort Core Count	10	3	2	4	1
AS WP Assort Sales U	52,430	15,002	5,475	28,302	3,650
AS WP Assort Sales R	493.5 K	154.7 K	37.6 K	259.4 K	41.8 K
AS WP Assort Gross Profit R	212.3 K	59.3 K	11.5 K	125.0 K	16.5 K
AS WP Assort Gross Profit %	43.0 %	38.3 %	30.6 %	48.2 %	39.4 %
WP ASO Assort Facings Length	34,944	17,664	3,072	5,760	8,448
WP ASO Assort # Facings	46	15	10	16	5
WP ASO Assort Avg Service Level	6.71	3.85	6.26	23.10	1.69
AS LY Assort Carried	<input checked="" type="checkbox"/>				
AS LY Mandatory	<input type="checkbox"/>				
AS LY Mandatory Count	0	0	0	0	0
AS LY Assort Core	<input checked="" type="checkbox"/>				
AS LY Assort Core Count	61	30	6	10	15
AS LY Assort Sales U	224,334	96,773	31,976	43,148	52,437
AS LY Assort Sales R	2,549.9 K	1,206.1 K	219.7 K	467.8 K	656.3 K
AS LY Assort Gross Profit R	1,074.9 K	512.2 K	66.5 K	224.8 K	271.3 K
AS LY Assort Gross Profit %	42.2 %	42.5 %	30.3 %	48.1 %	41.3 %

Table 9–24 lists the measures available in this view.

**Table 9–24 2. Review Space Optimized Assortment @ Store View Measures**

Label	Description
AS WP Assort Carried	A Boolean flag measure indicating whether an item is part of the working plan assortment for the store. Core items are part of the assortment. Similar measures in other versions include: AS LY Assort Carried, AS CP Assort Carried, and AS LP Assort Carried.
AS WP Mandatory	A Boolean flag measure used to mark an item as mandatory in a working plan assortment for the store. Similar measures in other versions include: AS LY Mandatory, AS CP Mandatory, and AS LP Mandatory.
AS WP Mandatory Count	The number of mandatory items in a working plan assortment for the store. Similar measures in other versions include: AS LY Mandatory Count, AS CP Mandatory Count, and AS LP Mandatory Count.

**Table 9–24 (Cont.) 2. Review Space Optimized Assortment @ Store View Measures**

<b>Label</b>	<b>Description</b>
AS WP Assort Core	A Boolean flag measure indicating whether an item is a core item in the working plan's assortment for the store. Similar measures in other versions include: AS LY Assort Core, AS CP Assort Core, and AS LP Assort Core.
AS WP Assort Core Count	The number of core items in a working plan assortment for the store. Similar measures in other versions include: AS WP Assort Core Count, AS WP Assort Core Count, and AS WP Assort Core Count.
AS WP Assort Sales U	The sales units in the working plan assortment for the store. Similar measures in other versions include: AS LY Assort Sales U and AS CP Assort Sales U.
AS WP Assort Sales R	The sales retail value in the working plan assortment for the store. Similar measures in other versions include: AS LY Assort Sales R and AS CP Assort Sales R.
AS WP Assort Gross Profit R	The gross profit retail value in a working plan assortment for the store. Gross Profit Retail is the difference between Sales Retail and Cost of Goods Sold. Similar measures in other versions include: AS LY Assort Gross Profit R and AS CP Assort Gross Profit R.
AS WP Assort Gross Profit %	The gross profit percentage in a working plan assortment for the store. Similar measures in other versions include: AS LY Assort Gross Profit % and AS CP Assort Gross Profit %.
WP ASO Assort Facings Length	The length of the number of facings allotted to a SKU in the POGs in a store layout after the working plan assortment's space optimization by ASO. This measure is an output from ASO at the SKU/Store level. Similar measure in different versions include: LY ASO Assort Facings Length, CP ASO Assort Facings Length, and LP ASO Assort Facings Length.
WP ASO Assort # Facings	The number of facings allotted to a SKU in the POGs in a store layout after the working plan assortment's space optimization by ASO. This measure is an output from ASO at the SKU/Store level. Similar measure in different versions include: LY ASO Assort # Facings, CP ASO Assort # Facings, and LP ASO Assort # Facings.
WP ASO Assort Avg Service Level	The average service level that represents the probability of an item's availability at a store in the working plan assortment. This measure is an output from ASO at the SKU/Store level. Similar measure in different versions include: LY ASO Assort Avg Service Level, CP ASO Assort Avg Service Level, and LP ASO Assort Avg Service Level.
AS LY Assort Sales R per Linear Unit	The sales retail return per linear unit of facings length in last year's assortment at the store level. It is calculated by dividing AS LY Assort Sales R by LY ASO Assort Facings Length. Similar measures in other versions include: AS WP Assort Sales R per Linear Unit and AS CP Assort Sales R per Linear Unit.
AS LY Assort Sales R per facing	The sales retail return per facing in last year's assortment at the store level. It is calculated by dividing AS LY Assort Sales R by LY ASO Assort # Facings. Similar measures in other versions include: AS WP Assort Sales R per facing and CP AS Assort Sales R per facing.

**Table 9–24 (Cont.) 2. Review Space Optimized Assortment @ Store View Measures**

<b>Label</b>	<b>Description</b>
AS LY Assort Gross Profit R per Linear Unit	The gross profit retail return per linear unit of facings length in last year's assortment at the store level. It is calculated by dividing AS LY Gross Profit R by LY ASO Assort Facings Length. Similar measures in other versions include: AS WP Assort Gross Profit R per Linear Unit and AS CP Assort Gross Profit R per Linear Unit.
AS LY Assort Gross Profit R per facing	The gross profit retail return per facing in last year's assortment at the store level. It is calculated by dividing AS LY Assort Gross Profit R by LY ASO Assort # Facings. Similar measures in other versions include: AS WP Assort Gross R per facing and CP AS Assort Gross Profit R per facing.
WP ASO Assort Avg Days of Supply	The inventory or stock cover measured as the average number of days of inventory supply present at the store at any given time during the planning period. This measure is an output from ASO. Similar measures in different versions include: LY ASO Assort Avg Days of Supply, CP ASO Assort Avg Days of Supply, and CP ASO Assort Avg Days of Supply.
WP ASO POG Length	The length of the POG in which a SKU is merchandised at the store per the working plan assortment's space optimization by ASO. This measure is an output from ASO at the SKU/Store level. The grouping of stores in the form of space clusters is done on the basis of POG length.
AS WP Mandatory Count	The number mandatory items in a working plan assortment for the cluster. Similar measures in other versions include: LY Mandatory Count and CP Mandatory Count, LP Mandatory Count.

### Measure Profiles

WP/CP: This measure profile presents a comparison of the working plan for the space optimized assortment with the current plan assortment at the store level.

WP/LP: This measure profile presents a comparison of the working plan for the space optimized assortment with the last plan assortment at the store level.

WP/LY: This measure profile presents a comparison of the working plan for the space optimized assortment with the last year assortment at the store level.

## Approve Assortment Tab

This tab has one view.

### Approve Assortment @ Store View

Use this view to approve the store level assortment by checking the AS WP Approve to CP for a store measure.

Prior to approving the assortment, the placeholder items, which are part of the assortment, need to be formalized by Category Management Admin after receiving a feed of formalization information from RMS or an MDM system. For more details, see "[Placeholder and Formalized Items Step](#)" in [Chapter 3](#).

**Figure 9–27 Approve Assortment @ Store View**

	AS Assort Label	AS Last Exported Ver	AS Active Export Exists	AS Exported to ASO	AS ASO Results Imported	AS ASO Results Accepted	AS WP Approve to CP	AS Approve Comment	AS Approve to CP By	AS Approve to CP Date	AS Approve to CP Comment
1023 Seattle	FY2014	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
1024 Portland	FY2014	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
1025 Boise	FY2014	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
1026 Billings	FY2014	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
1027 Denver	FY2014	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
1028 Salt Lake City	FY2014	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
1029 Eugene	FY2014	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
1030 Salem	FY2014	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				

Table 9–25 lists the measures available in this view.

**Table 9–25 Approve Assortment @ Store View Measures**

Label	Description
AS Assort Label	The system-generated label displayed for a working plan assortment which was last exported for assortment space optimization at the store level.
AS Last Exported Ver	Assortment plans exported for space optimization are identified by the assortment set and corresponding version. Assortment set is a sequential system-generated number assigned to an assortment plan exported for a specific product category, trading areas, and quarters. Assortment Set Version is a sequential system-generated number, representing the number of exports against a specific assortment set. AS Last Exported version is a system-generated number for an assortment set, used to identify the last assortment plan exported for space optimization at the store level.
AS Active Exports Exist	A Boolean measure used to indicate if there are any active exports for a store where the assortment space optimization results are expected.
AS Exported to ASO	This system-generated Boolean flag measure is used to indicate the successful export of assortment plans for space optimization for a store. It is not reset on successful import of optimization results.
AS ASO Results Imported	This Boolean flag measure is used to indicate the import of assortment space optimization results for a specific store and product category, at least once. This measure remains checked if the imports have happened at least once.
AS ASO Results Accepted	This system-generated Boolean flag measure is used to indicate if the assortment space optimization results have been accepted at least once for a store and product category.
AS WP Approve to CP	A Boolean flag measure that needs to be checked before running the Approve ASO Results @Store custom menu to approve the assortment.

**Custom Menu**

Use the Approve Assortment @Store custom menu in this view to approve the assortment.

**Finalize Assortment for Implementation Tab**

This tab has one view.

## Finalize Assortment for Implementation View

Use this view to finalize the assortment for implementation. On finalization, the formalization information is exported to ASO and a signal is sent to ASO to go ahead with the implementation at the stores through a space management system.

**Figure 9–28** *Finalize Assortment for Implementation View*

	all [Location]	Northwest
Assort Label	Coffee - 2nd Qtr, FY2014 - 2nd Qtr, F...	Coffee - 2nd Qtr, FY2014 - 2nd Qtr, FY2014
Assort Set		1
Approved to CP	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
WP Assort Finalize	<input type="checkbox"/>	<input type="checkbox"/>
Assort Finalized	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Finalized ASO Assort Set		1

Table 9–26 lists the measures available in this view.

**Table 9–26** *Finalize Assortment for Implementation Measures*

Label	Description
Assort Label	The system-generated label displayed for a working plan assortment which was last exported for assortment space optimization.
Assort Set	Assortment plans exported for space optimization are identified by the assortment set and corresponding version. Assortment set is a sequential system-generated number assigned to an assortment plan exported for a specific category, trading areas, and quarters. On assortment finalization for implementation, the assortment set number is incremented by 1 for the clusters under the same trading areas.
Approved to CP	A Boolean flag measure used to indicate if an assortment has been approved.
WP Assort Finalize	A Boolean flag measure which needs to be checked before running the custom menu to finalize the assortment.
Assort Finalized	A Boolean flag measure used to indicate if the assortment has been finalized.
Finalized ASO Assort Set	The Assort Set Number which has been finalized.
Finalized Assort Set	The assortment set which was last finalized.

