nextail

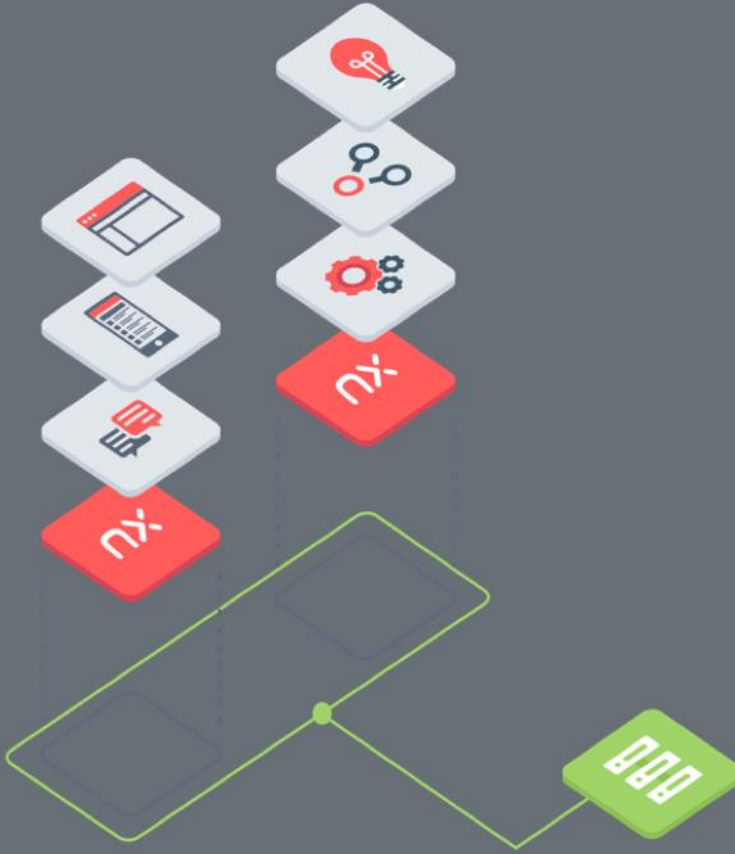## Running an Optimisation & Adding Inputs

November 2020

Private and confidential

At the end of this session we will expect you to

○ Understand how Nextail uses categories to give flexibility on data management by stores & products

○ Be able to run a First Allocation optimisation

○ Review & download results of a First Allocation optimisation

○ Feel comfortable inputting some criteria directly within the platform

○ Feel comfortable uploading criteria into the platform through data files

Content

1   **Category Management**

2   First Allocation optimisation

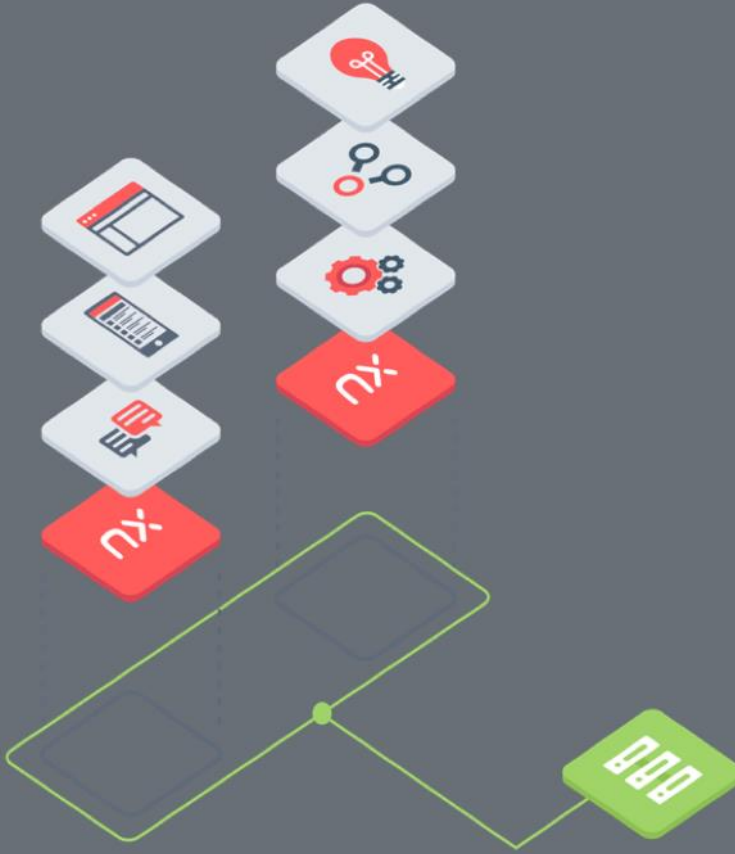**3**   Inputting data into the platform

4   Use cases

5   Next steps

Through Nextail's platform you will have access to *big data* and you
have the power to run dummy *executions at scale.*

In order to help organise the breadth of your products and store
network, we use *categories* to group products together and stores
together

Content

1   **Category Management**

      1   **Type of categories**

      2   Category creation

      3   Category edition

2   First Allocation optimisation

**3**   Inputting data into the platform

4   Use cases

5   Next steps

Grouping products or stores within Categories allows us to take actions and view data at an aggregated level

There are two types of categories within the Nextail platform

- **Automatic categories**: created based on product or store attributes shared

  in the master files

  - Created automatically

  - Updated automatically everyday

- **Manual categories:** created ad-hoc when we need to group a selection of

  stores or products

  - Created by Nextail per customer request

  - Filled and updated by Nextail or by the customer
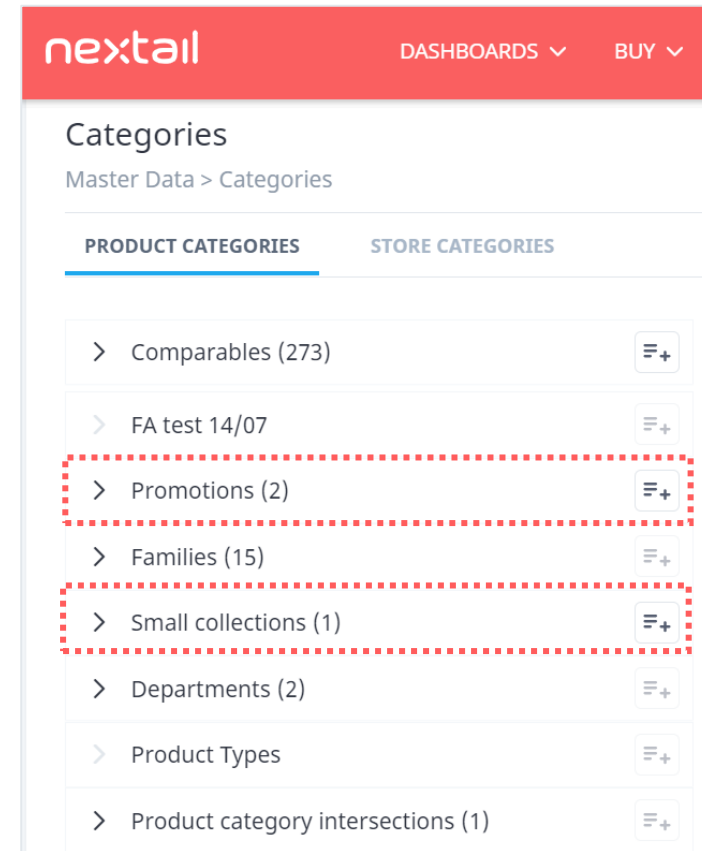
Example of filters in Top Products report:
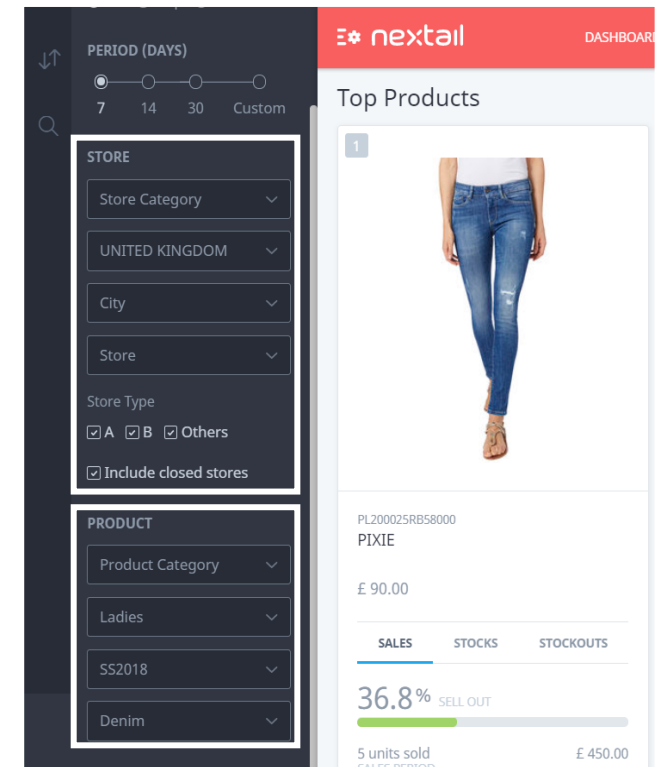
Product categories allow us to see data aggregated by departments, collections or any combination of products

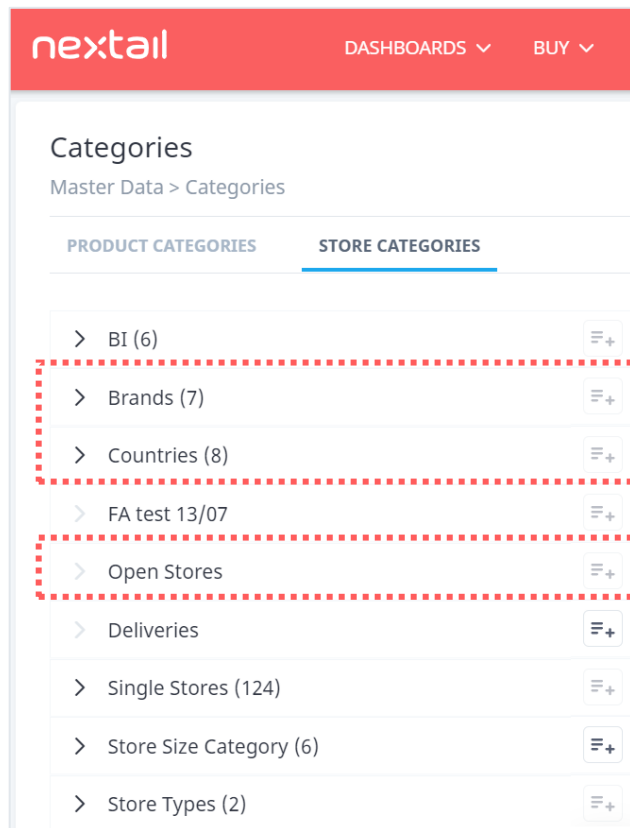- Automatic categories: Families, Departments, Product types
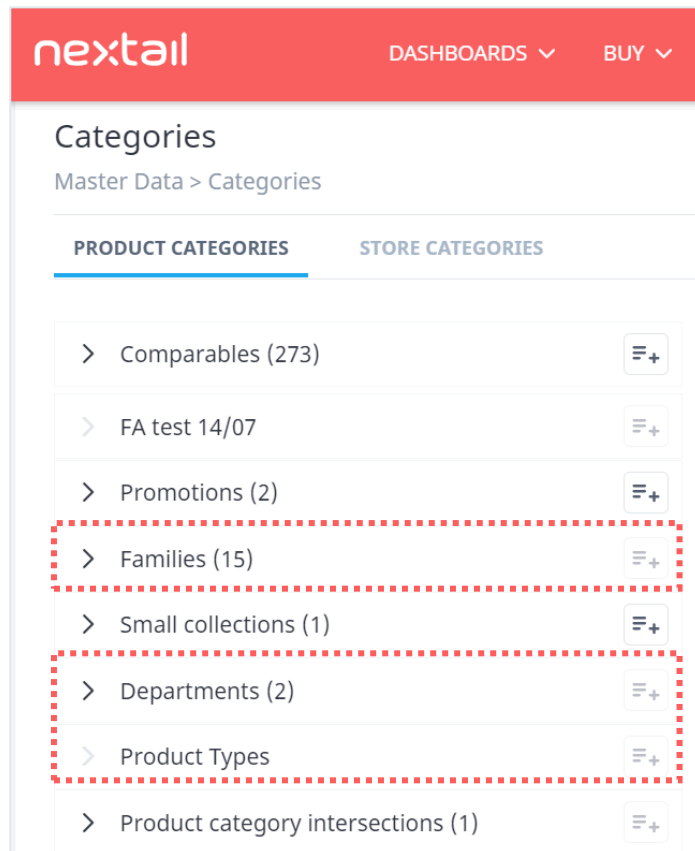
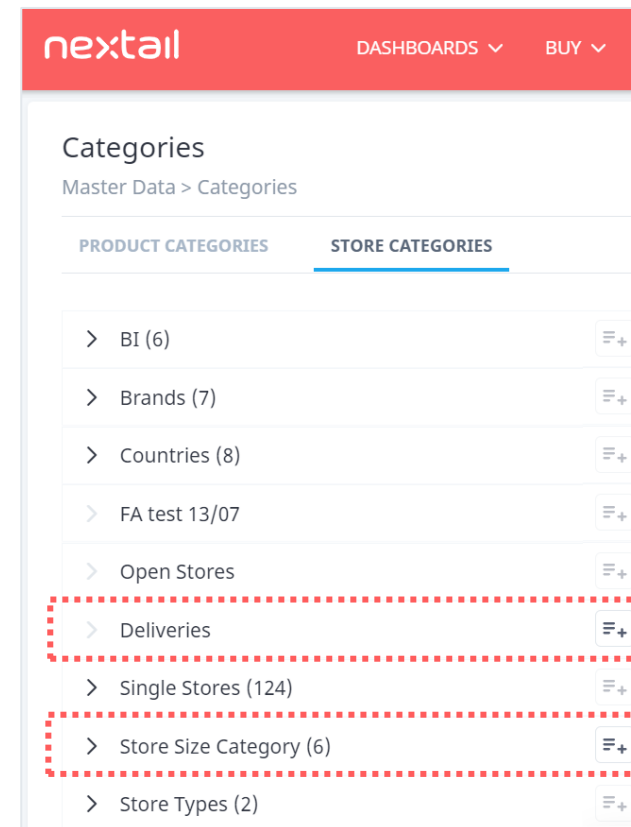- Manual categories: promotions, small collections

Store categories allow us to see data aggregated by countries, store sizes or any combination of stores

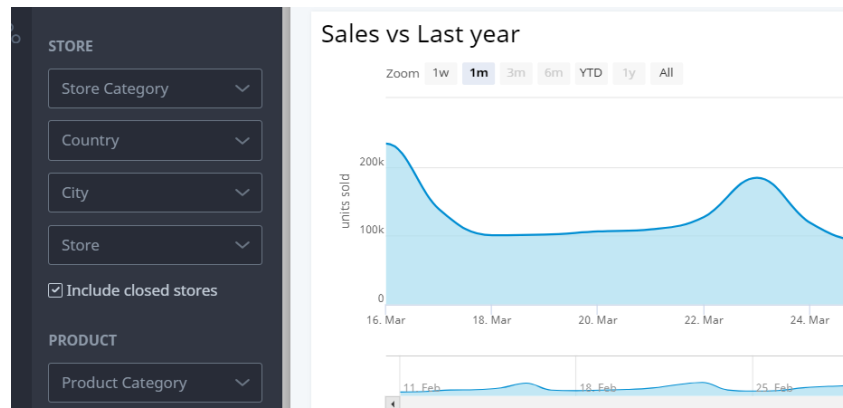- Automatic categories: brands, countries, open stores
- Manual categories: deliveries, store size category

Having relevant product & store categories will help give context throughout the platform

Viewing data within the dashboard

Running dummy scenarios

Downloading relevant data from the platform

Creating promotions

Content

1   **Category Management**

2   First Allocation optimisation

3   Inputting data into the platform

4   Use cases

5   Next steps

Manual categories can be created on your own on the platform

- In **Master Data > Categories page ,** you will be able to create a child category to fill with products or stores afterwards.
- Categories tree are divided into two main sections: Product categories and Store categories. Click on the **"Create category"** button to the right side of the category name.
- Write the name of the new category and click **"Create"**

To take into consideration

- The creation of root categories is not allowed
- Under categories with an arrow and additional icon in black you can create children categories. The grey icons refer to automatic or read-only categories.
- Alphanumeric characters are permitted in the name and a max. length of 100 characters.
- New categories with same name of an existing one will be created with a suffix: (1), (2), etc.

A group of new categories can be created in bulk through Data upload page

- Go to Daily Data > Data Upload, select the option **"Category creation"** and choose the file to be uploaded.
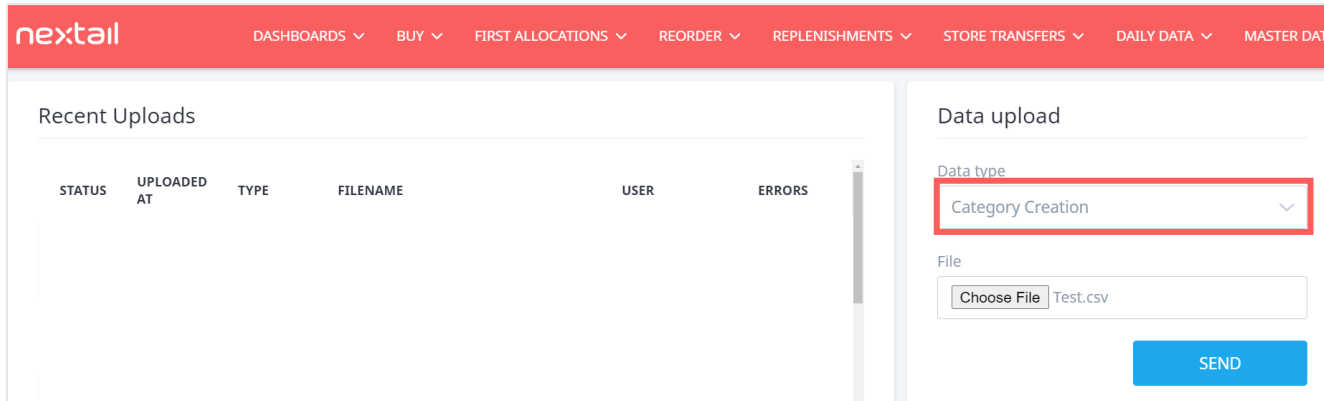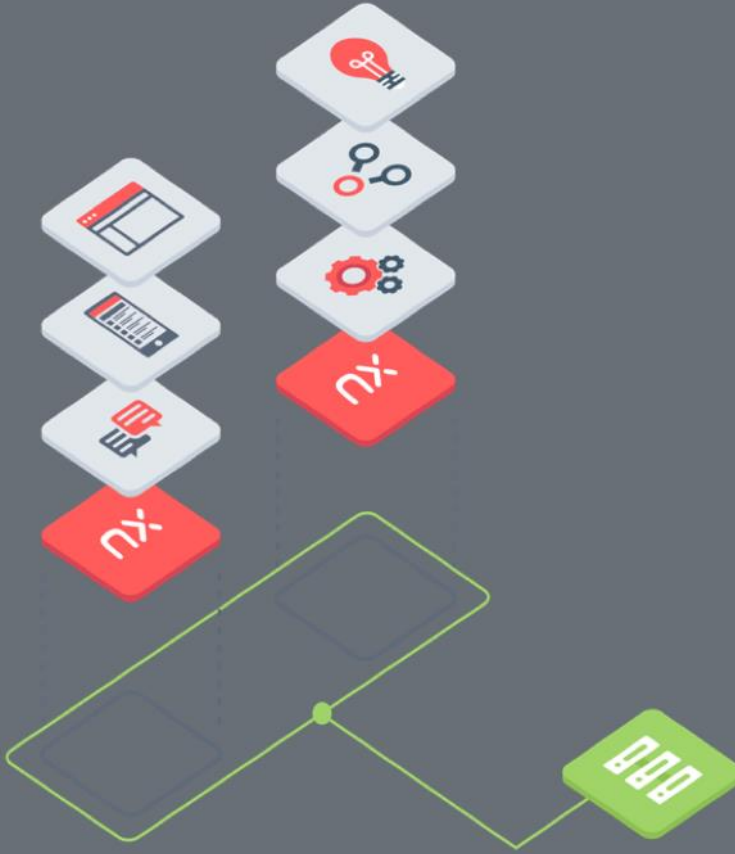

- The file must contain the following columns:

	A	B	C
1	ParentCategoryName	CategoryName	Type
2	Small Collections	Be cool - Women	Product
3	Small Collections	Be cool - Men	Product
4	Small Collections	Be cool - Kids	Product

- **ParentCategoryName:** name of the manual category which will be the parent of the new category
- **CategoryName** : name of the category to be included
- **Type (optional):** specify if this new category is meant to the Product or Store tree

Important considerations:
- All created categories must have the first letter in uppercase
- This function does not allow to create a category with same name and different letter case than an existing one
- The creation of root categories is not allowed

Content

1   **Category Management**

     1   Type of categories

     2   Category creation

     3   **Category edition**

2   First Allocation optimisation

3   Inputting data into the platform

4   Use cases

5   Next steps

Filling up your own product or store categories is simple

- Go to menu "Master Data > Products"
- After clicking on "Bulk Category Assign" on the next screen, introduce the Product Category or Store Category, and paste the list of product references or store codes that will be part of that category

1| Click on "Bulk Category Assign"

2| Introduce the desired Product category from the drop down menu and then all the product references separated by commas or in different lines. Once finished, click "Submit" button.

Also make editions by adding or removing within the category on the category items page
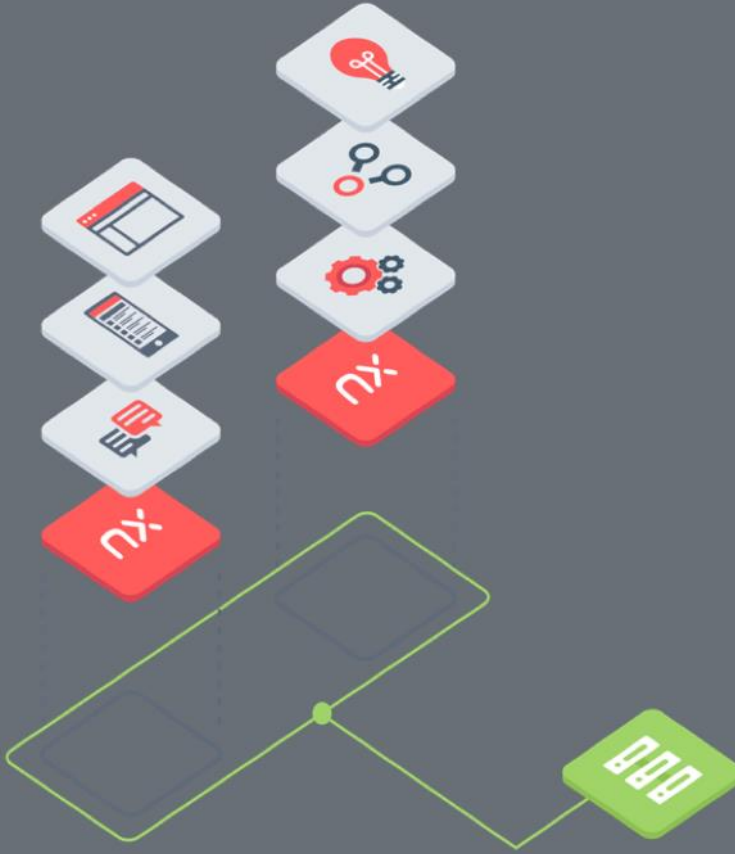
- In Master Data column, select **Product/Store category items** option
- Select an editable category (manual category)
- Use the filters to list the products you want to add and/or click on the checkbox to remove a product.
- As you select, the list of products will appear on the right-side panel to "Save" the changes once you are done.

Content

1 Category Management

2 **First Allocation optimisation**

   1 Run an optimisation

   2 Review and execute optimisation results

   3 Calendar plan

3 Inputting data into the platform

4 Use cases

5 Next steps

A First Allocation optimisation is a process that you run through Nextail's platform

We call it an optimisation because it adds the strength of our algorithms to your current decisions
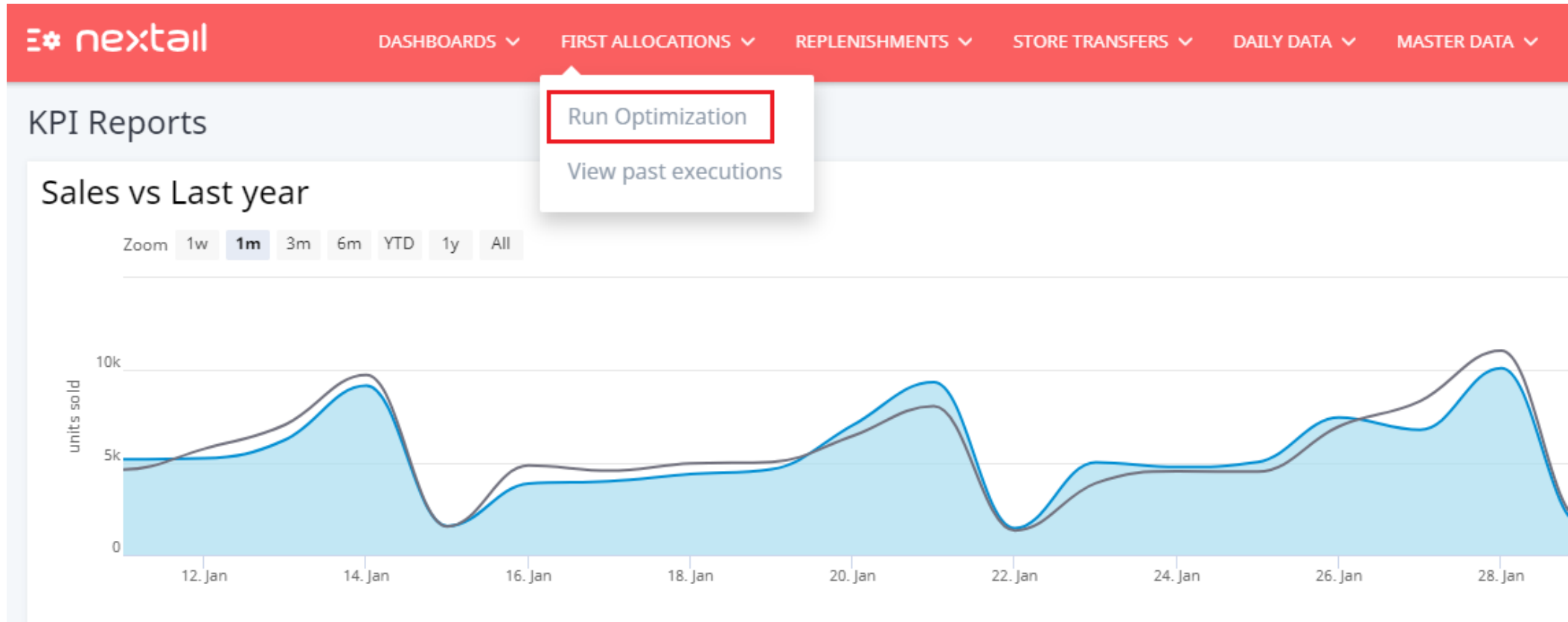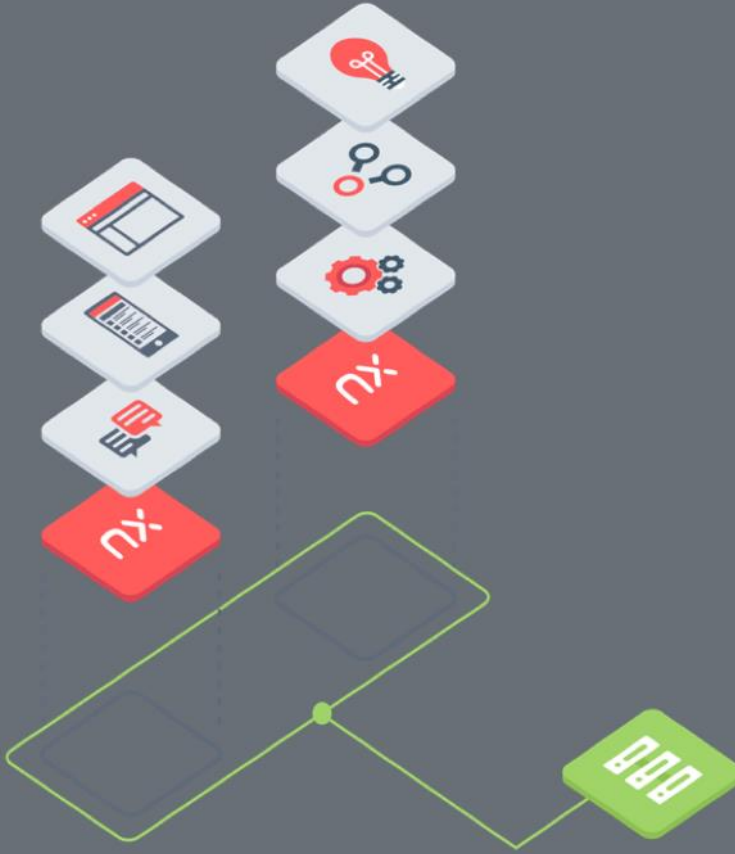
Content

1 Category Management

2 **First Allocation optimisation**

 1 **Run an optimisation**

 2 Review and execute optimisation results

 3 Calendar plan

3 Inputting data into the platform

4 Use cases

5 Next steps

You can run an optimisation by going to the "First Allocations" tab on the platform

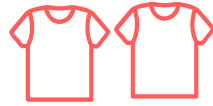# Only four steps divide you from launching your First Allocation scenario

1

Products selection

Work with a previously defined product category or create a new group of products to allocate (one by one)

2

Comparable products

Choose the products considered as similar (sold in past seasons) in order to calculate a forecast.

3

Stores scope

Define the stores that will be involved in the first allocation scenario.

4

Applying parameters

The parameters optimise the first allocation scenario.

There are three alternatives of selecting products for a First Allocation scenario

1. Pre-created category

Select products

Select the set of products for a first allocation to stores

× DRESSES

☐ Let me edit the set before the next step

Continue

*

+ CREATE NEW SET OF PRODUCTS

2. References or barcodes

Create a new set of products from barcodes/references and use it as selection

Parent category

× DRESSES

Product set name

Summer Dresses|

Create from codes/refs

3. Choosing products

Create a new set of products from scratch and use it as selection

Parent category

× DRESSES

Product set name

Summer dresses|

Create from scratch

1| Select a pre-created product category. Is the most common alternative to select products
2| Create a new product category by introducing references or barcodes manually
3| Create a new product category by choosing products one by one

*Important: Click on "Create new set of products" to show the option 2 and 3. Then, select a parent category for new products to be attached to and a name for the new product set.

Pre-created product categories can be easily reviewed, and their contents edited

1| Tick this box to look at these products in the next screen
2| Selected products (with tick mark) will appear in the box on the right
3| Check which products you're adding / removing from the selection before clicking "save"
4| Click on "continue" once finished

Nextail's FA module will suggest a group of comparable products for each item you want to introduce to the stores

Define comparable products

Select the categories that define the products which are comparable to the ones you have selected for: **FA**

	PRODUCT	PRICE	FAMILY	COMPARABLE PRODUCT CATEGORY	
☐	A-02503021 DEMO DRESS 01	399.90 €	DRESSES	✕ Similars to A-02503021 - DEMO DRESS ⌄	✎
☐	A-03102011 DEMO DRESS 03	369.90 €	DRESSES	✕ Similars to A-03102011 - DEMO DRESS ⌄	
☐	A-03103021 DEMO DRESS 05	459.90 €	DRESSES	✕ Similars to A-03103021 - DEMO DRESS ⌄	

✎ Edit the indicated category of comparable products

- The categories tagged as 'comparable' are available in the category's selector. Each product category contains the products with the highest comparability coefficient.
- You can always edit the default group of comparable products and apply different filters.

Our team can adjust the criteria using specific categories as product features provided in the Product Master and recalculate it again.

To edit non-default comparable product categories you can use the filter menu on the side
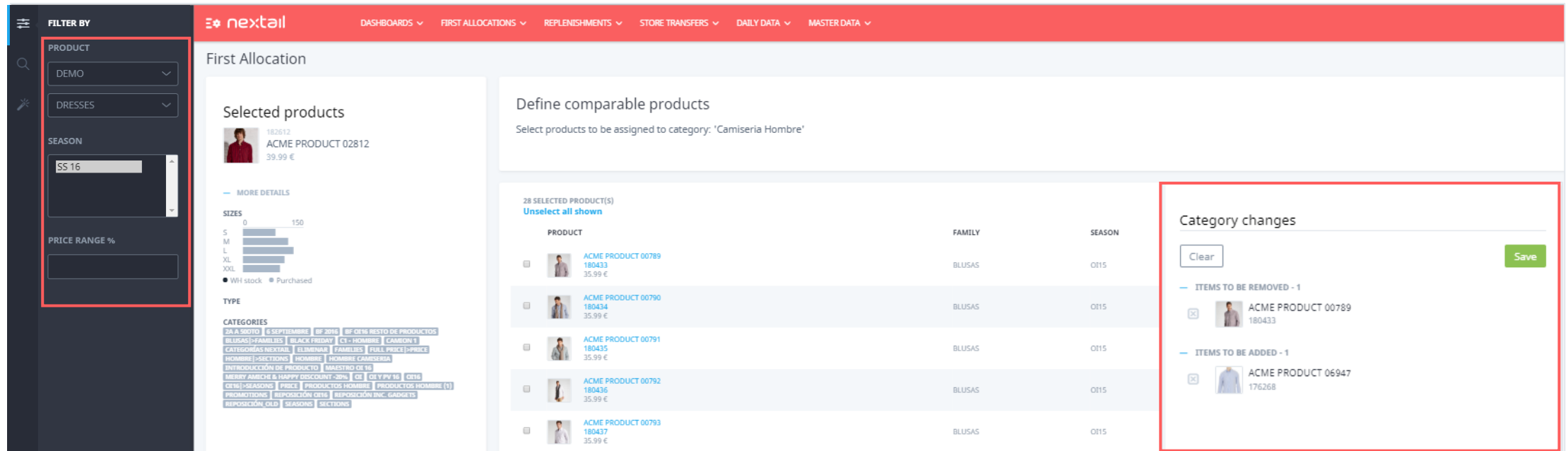
- Narrow down the product search with product filters
- After removing or adding units, save the changes before continuing

Once the comparable products has been selected, we can also select a different group of stores for each product to be first allocated

1| Select a desired store category for each product, automatically unblocking it for first allocation(*)

2| Assign the stores to multiple products at the same time by applying filters (tick boxes of desired products first)

Or provide to Nextail a list of the products and corresponding stores and we will get it uploaded for you

(*) The selection of the stores is associated with the status of blocks/unblocks for First Allocation. At first, all the stores are "BLOCKED" for First Allocation for all the products, and only when a store is "UNBLOCKED", it will be able to receive units.

The launch screen allows you to input several parameters that define the scenario perimeter and how the forecast is calculated

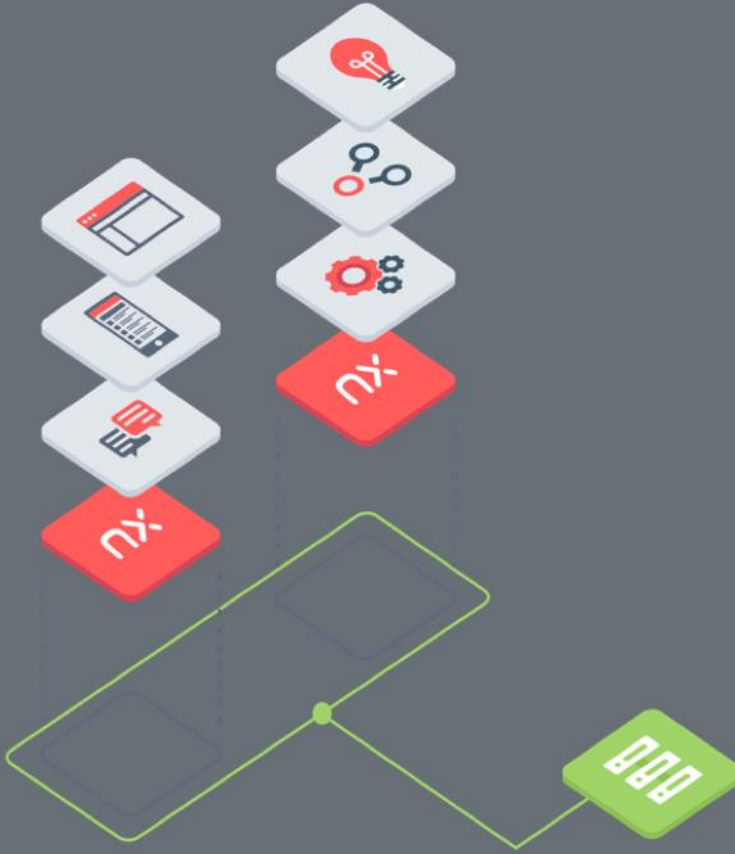**1|** Define the scope of your first allocation scenario:

- Brand
- Warehouse
- Store category: can be left empty as you will have selected the stores in the previous step. Fill it only if all the products in the scenario need to be sent to the same stores.
- Calendar plan: a calendar plan must be selected to be able to process the order

2| Select the parameters that will influence the demand forecast calculation:

- Planning horizon (days)
- Forecast weeks and weight for each week (%)
- 3 best sales weeks instead of first weeks of sales

3| The option "Enable multi sales threshold" calculates for 1 scenario 10 different FA proposals changing the sales threshold, with a default selected in the bar. The other values are 0, 3, 5, 7, 10, 13,15, 20, 25, 30.
If the option is unchecked, each product has its own threshold configured in the products page.

**4|** Start the first allocation calculation process

Content

1   Category Management

2   **First Allocation optimisation**

      1   Run an optimisation

      2   **Review and execute optimisation results**

      3   Calendar plan

3   Inputting data into the platform

4   Use cases

5   Next steps

Optimisation results can be reviewed in the "View past executions" option within the "First Allocations" menu

1| Select "View past executions" from the "First Allocations" menu:
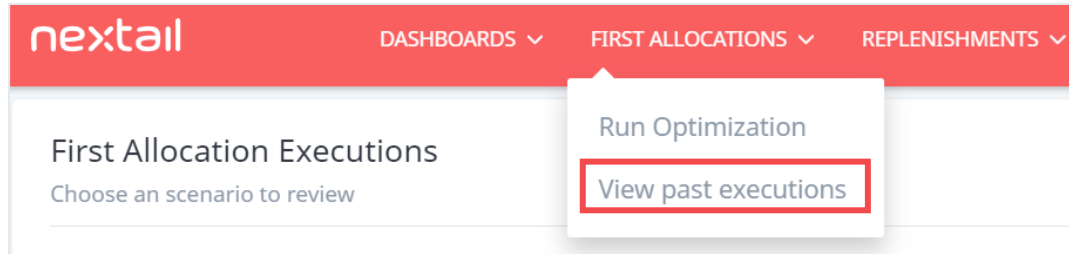
2| Select the desired execution from the list :

Status	Scenario ID	Date	User	Product category	Stores	Products	Units
●	1598	19 Mar, 11:46:13 (UTC)	carmen@nextail.co	Demo	80	2	704
●	2977	11 Mar, 15:35:31 (UTC)	carmen@nextail.co	Demo	9	2	123
●	2966	5 Mar, 16:57:21 (UTC)	carmen@nextail.co	Demo	10	2	116
●	2955	26 Feb, 12:10:55 (UTC)	carmen@nextail.co	Demo	12	2	108

The scenario overview presents aggregated results information and allows you to execute basic actions like getting more details or downloading the order file

1 | Summary: total # of stores, products, SKUs and units sent

2 | Product / Store tab: select view for details

3 | Click on each product for more detail

4 | Update WH stocks*: warehouse stock has changed since the scenario was launched

5 | Click here for detailed results at product level

6 | Download and regenerate the Order file to review in Excel

(*) The product-store allocations are not recalculated with the new available warehouse stock

The product and store tab contains information as Sales Threshold used in the execution and units by family to be sent to each store

PRODUCTS   STORES

	AGGRESSIVITY	UNITS	Sent / WH Stock	STORES	Sent / Selected
	1.			• Sent • Selected	
183316 ACME PRODUCT 03465	15%	34%	175 out of 511	100%	31 out of 31
183317 ACME PRODUCT 03466	15%	**2.** 35%	174 out of 491	100%	31 out of 31
183322 ACME PRODUCT 03471	15%	42%	175 out of 416	**3.** 100%	31 out of 31

	1. In store			2. Sent in FA		3. Total	
STORE	PRODUCTS	UNITS	COV (W)	PRODUCTS	UNITS	PRODUCTS	UNITS
- 401 - ACME STORE 084		0	0.00	5	24	5	24
BLUSAS	0	0	0.00	3	14	3	14
PASMINAS Y PAÑUELOS	0	0	0.00	2	10	2	10
+ 452 - ACME STORE 125		0	0.00	5	24	5	24

+ Expand the results to see a disaggregated summary by family

401 - ACME STORE Click on the store code/name to browse to the main store screen

1| Aggressivity refers to the Sales Threshold used during the execution (term not yet updated in this screen)
2| % and quantities allocated out of the total bought / available in the warehouse
3| % and # of stores that receive product out of the selected in the previous step for that product

1| Current Store stock: # of products, units and coverage in weeks
2| # of products and units to be sent if scenario is executed
3| Situation after execution: "In Store" + "Sent in FA"

In the product details screen of the scenario you can easily change the allocation and see the high-level impact on units sent, stores reached and warehouse stock left
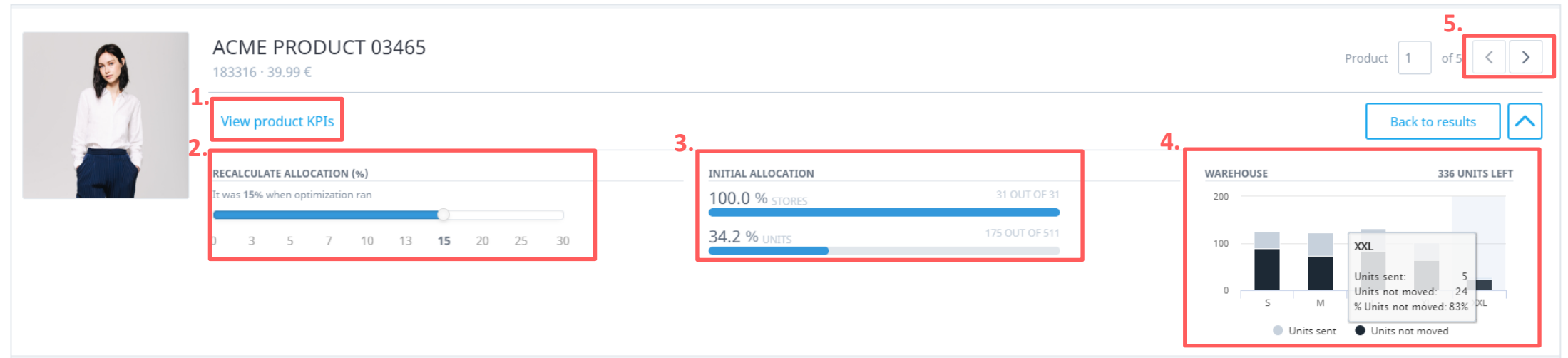

1| Navigate to KPI dashboard with stock and sales history for this product
2| Sales Threshold (%): move the bar to see the impact in the allocation scenario
3| Stores:# and % stores allocated out of selected.
    Units: # and % units allocated out of total bought.
4| Warehouse stock by size (bought, allocated and remaining)
5| Navigate to previous or next product in the scenario

You can quickly edit the allocation for a given product by using the Sales Threshold bar, and see the impact recalculated on the fly
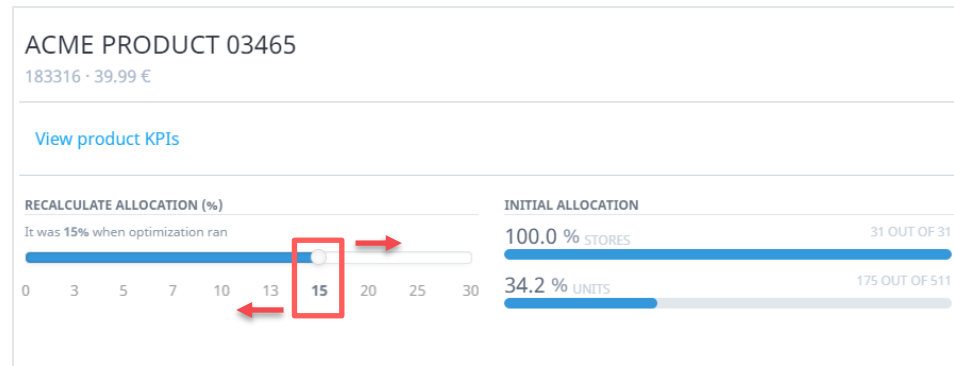
1. ⬆ Sales threshold
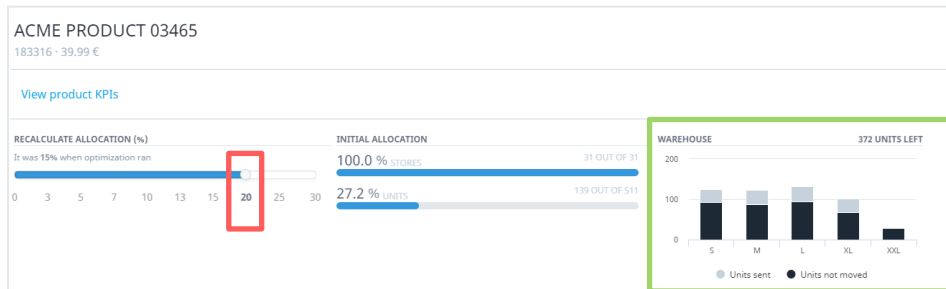
2. ⬇ Sales threshold
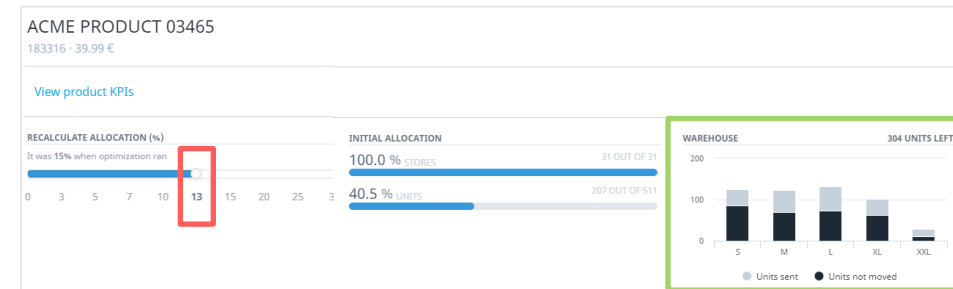
Move the bar to modify the Sales Threshold and the amount of product proposed to send will vary

1| Less units sent to stores, more kept in warehouse

2| More units sent to stores, less kept in warehouse

In the details section of the screen, you can see the results of the allocation for each store and easily modify it

1|Use these options to manage the store selection and **edit** the allocation

2|Stores in white are those that were included last time scenario was executed/modified.

Stores in grey are those which were excluded for the next optimisation.

3|See/hide panel with summary of scenario results for that product.

Switch between card and list view

Hover to see details on the store stock situation

Select / unselect store (for edition)

Stores in grey: Select it back to be included in the next optimisation

The allocation for a particular store or group of stores can also be easily edited through the action menu

Tick all the stores for which you want to edit the allocation or click **"Select all"**.

1| **Clear selection** to unselect all selected stores

2| **Dismiss selection**: set the allocation to 0 for all sizes

3| **Edit single units allocation:** Manually input the allocation by size.

4| **Allocate full size set:** Allocate at least 1 unit per size (if scenario result was higher, leave as is)

5| **Exclude in next optimisation:** Block store from receiving allocation for this product in a future scenario execution

Once done, click on [Back to results] to return to the scenario summary screen

> **This options easily change the allocation for those stores, overriding the calculations of Nextail's optimisation engine**

When edits are complete, you should regenerate files and send the waybills to the warehouse for execution

1 | Regenerate files: if you made changes, click here to regenerate the files before downloading them
   Download: you can download a detailed Results file with all calculations in Excel, as well as the waybills, for review.
2 | Click **Send waybills** when you're done reviewing so that your warehouse can process the order. . If the scenario is submitted, the waybills are automatically regenerated.
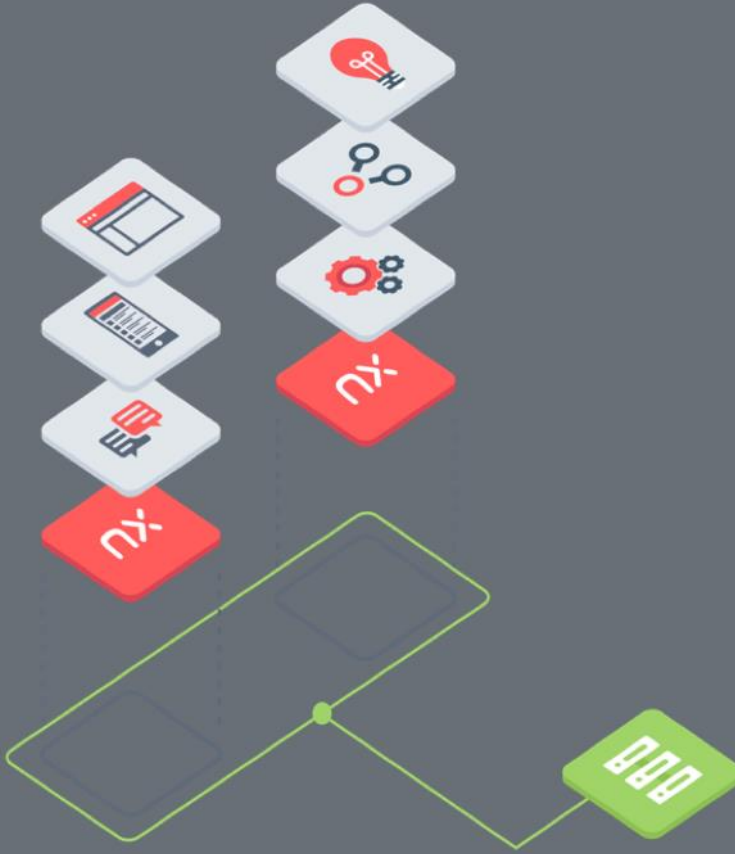
Content

1   Category Management

2   **First Allocation optimisation**

    1   Run an optimisation

    2   Review and execute optimisation results

    3   **Calendar plan**

3   Inputting data into the platform

4   Use cases

5   Next steps

The calendar plans allow you to pre-set the stores that will be on the first allocation execution and the days when the shipments will take place

- Click on "Calendar plans" option in Master Data
- Select the desired calendar plan from the filters visible on the right side of the screen.
- When you create a new calendar plan from the three-dots menu, the current one will be duplicated, and you will be able to edit it directly on the page
- As you assign days by store in the calendar, the page will automatically create groups with the same assigned days

Calendar plans applies to both : "First Allocation" and "Replenishment" modules

A calendar plan can also be edited from an excel file

1.

2.

3.

1|Download the calendar to edit the days from the three-dots menu to update the calendar plan

2|Make desired **edits to the file** (i.e. from false to true) on those days that the warehouse will collect the units

3|Upload the modified .xslx file by clicking on "Upload CSV"
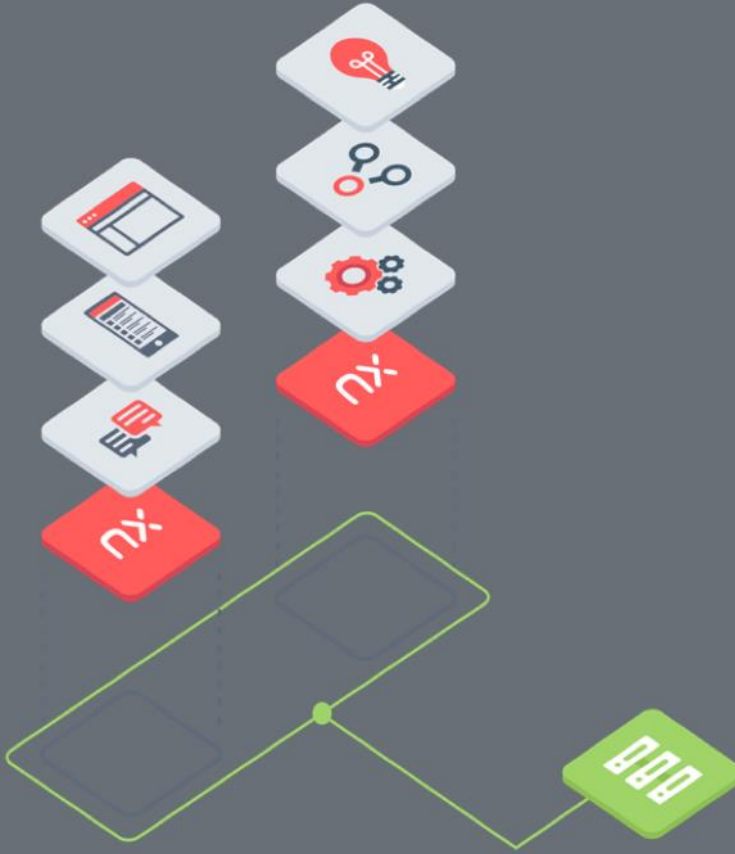
Content

As we reviewed in our last session, there are many parameters customizable in Nextail that affect First Allocation scenarios

Inputs you can influence for Demand Forecasting

- Comparable products *
- First week of sales *
- Weight of weeks *
- Planning horizon *
- Calendars
- Promotions

Inputs you can influence in the Global Optimisation

- Sales product threshold
- Visual rules
- Minimum displays
- Prepacks
- Stores assortment *
- Other conditions

* This parameter can be modified while launching the scenario

There are several ways to upload your input besides the parametrization page (Step 4)

Inputs you can influence for Demand Forecasting

- Comparable products
- First week of sales
- Weight of weeks
- Planning horizon
- Calendars
- Promotions

Inputs you can influence in the Global Optimisation

- Sales product threshold
- Visual rules
- Minimum displays
- Prepacks
- Stores assortment
- Other conditions

Directly in the platform
Can be done for individual products or at store/ product category level

Data Uploads
Via uploading an Excel file

Through your Nextail Services team
Currently, there are some inputs that can only be uploaded by Nextail

There are several ways to upload your input within the platform

Inputs you can influence for Demand Forecasting	Directly within the platform	Data uploads	Through your Services team
Comparable products	✔		✔
Previous weeks sales	✔		
Weight of weeks	✔		
Planning horizon	✔		
Calendars	✔		
Promotions	✔	✔	

Inputs you can influence in the Global Optimisation	Directly within the platform	Data uploads	Through your Services team
Sales product threshold	✔		
Visual rules	✔	✔	
Minimum Displays	✔	✔	
Prepacks			✔
Stores assorment	✔		
Other conditions			✔

Demand Forecasting:

- **Previous weeks sales & weights of each week**
- **Planning Horizons**
- Calendars
- Promotions

Global Optimisations:

- Sales Thresholds
- Visual rules
- Minimum Displays

Using weighted past sales to cover processing days are key in building Demand Forecasting

1| **Forecast weeks sales -** Number of first weeks sales (comparable products) used for the forecast. We look for sales on the first "n" weeks, or the best 3 best sales week

Using weighted sales to cover processing days are key in building Demand Forecasting

2| **Weight of weeks -** % of weight assigned to each of the previous weeks

Planning horizon lets you plan to have enough stock to sell

3| **Planning horizon -** Number of future sales days to be covered with forecast calculation after lead time.

Planning horizon in Nextail is **set at an execution level and it applies to all stores.**

Directly in the platform

Demand Forecasting:
- Previous weeks sales & weights of each week
- Planning Horizons
- **Calendars**
- Promotions

Global Optimisations:
- Sales Thresholds
- Visual rules
- Minimum Displays

Calendars let the customer decide the exact days the orders should be sent to stores despite being calculated daily for all stores

Calendars - It guarantees the stores receive the stock that they deserve calculating the need daily even if there is no warehouse order

Calendar Plans
Filter to select the Calendar Plan you want to edit

		☑ Monday	☐ Tuesday	☐ Wednesday	☑ Thursday	☑ Friday	☐ Saturday	☐ Sunday
Code	**Name**							
A0002	ACME STORE 0002	☑	●	🟥	☐	☐	☐	☐
A0003	ACME STORE 0003	☑	●	🟥	☐	☐	☐	☐
A0007	ACME STORE 0007	☐	☑	●	🟥	☐	☐	☐
A0008	ACME STORE 0008	☐	☑	●	🟥	☐	☐	☐

- Group 1 · **77 stores**

● **Warehouse dispatch**   🟥 **Arrival in store**

Directly in the platform

Demand Forecasting:
- Previous weeks sales & weights of each week
- Planning Horizons
- Calendars
- **Promotions**

Global Optimisations:
- Sales Thresholds
- Visual rules
- Minimum Displays

nextail

At Nextail, we define Promotions to be any POS discounts

However, within our platform you can use the Promotions functionality to capture the activity around non-recurring or movable events

Promotions can be configured in the system to capture the effect of non-recurring events of demand

ONGOING   FUTURE   **FINISHED**

Black Friday 2018 - Stores A
Period from 20 Nov to 24 Nov, 2018

🏬 29 stores   🏷 327 products

2.45
ACTUAL COEFF.

Black Friday 2018 - Stores B
Period from 20 Nov to 24 Nov, 2018

🏬 21 stores   🏷 327 products

2.68
ACTUAL COEFF.

Mid Season Sales
Period from 15 Oct to 07 Nov, 2018

🏬 150 stores   🏷 327 products

1.88
ACTUAL COEFF.

Flash Sales Week 48
Period from 12 Nov to 18 Nov, 2018

🏬 21 stores   🏷 91 products

1.46
ACTUAL COEFF.

Summer Sales - Stores A
Period from 01 Jul to 30 Jul, 2018

🏬 300 stores   🏷 467 products

1.29
ACTUAL COEFF.

Web Summer Special
Period from 01 Jul to 15 Jul, 2018

🏬 1 stores   🏷 224 products

1.33
ACTUAL COEFF.

Sales increase expected due the promotion will be considered when calculating the demand forecast

Promotions can be manually created for an established promotion period

1| Go to the menu "Master Data > Promotions"
2| Press "New promotion" button to create a new one
3| Configure the new promotion with the inputs required

3   Create a new promotion   ✕

MASTER DATA ⌄

2

Products

Overview of the promotions

New Promotion

Promotion name *

Stores

Select the promotions available for your network of stores and products

Promotion name

Categories

Store Category *

Affecting any date between [   ] and [   ]

Search 🔍 by name

Store Category ⌄

1 Promotions

ONGOING   FUTURE   **FINISHED**

Product Category *

Master Sections

Product Category ⌄

Product category items

| Sales in Barcelona | 👁 🗑 | Black Friday 50% | 👁 🗑 | Mid season sales may2019 | 👁 🗑 |
| Period from 26 Mar to 15 Apr, 2020 | | Period from 28 Nov to 30 Nov, 2019 | | Period from 15 May to 31 May, 2019 | |

From *   To *

yyyy-mm-dd   yyyy-mm-dd

Store category items

🏬 91 stores 🏷 11 products

🏬 91 stores 🏷 11 products

🏬 91 stores 🏷 7 products

Similar Promotion

Calendar plans

Similar Promotion ⌄

Visual Merchandiser

ACTUAL COEFF.

ACTUAL COEFF.

ACTUAL COEFF.

Promotion coefficient * ⓘ

Promotion coefficient

Promotion features

Promotion features

CANCEL   **CREATE**

Configuring promotions prompts several inputs

Create a new promotion   ✕

Promotion name *

    Promotion name

Store Category *

    Store Category   ⌄

Product Category *

    Product Category   ⌄

From *   To *

    yyyy-mm-dd   yyyy-mm-dd

Similar Promotion

    Similar Promotion   ⌄

Promotion coefficient * ⓘ

    Promotion coefficient

Promotion features

    Promotion features

        CANCEL   CREATE

- **Promotion name:** Specific name we want to use to store the promotion's data

- **Stores Category:** Selection of stores impacted by the promotion

- **Product Category**: Selection of products impacted by the promotion

- **Period:** Start and end date for the promotion in the stores

- **Similar Promotion**: List of past promotions stored of which we can select the one most similar to the upcoming one.

- **Promotion Coefficient:** Sales increase expected due to the promotion. For example, a coefficient of 1.5 means we are expecting 50% extra demand due to the promotion effect. At the end of each promotion, the actual coefficient is calculated and stored. By default the actual coefficient of the similar past promotion selected is applied, however it can be over-written by one we think is more in-line with the new promotion.

- **Promotion features**: Description of the promotion.

nextail

Future promotions can be easily deleted or modified; however, ongoing promotions can only be deleted

Directly in the platform

Demand Forecasting:
- Previous weeks sales & weights of each week
- Planning Horizons
- Lead times & Calendars
- Promotions

Global Optimisations:
- **Sales Thresholds**
- Visual rules
- Minimum Displays

The sales threshold can be modified from the scenario

1| Go to menu "First Allocation > View past executions"

2| Select the scenario you want to display

3| Move the bar to modify the Sales Threshold and the amount of product proposed to send will vary

- Less units sent to stores, more kept in warehouse
- More units sent to stores, less kept in warehouse

Directly in the platform

Demand Forecasting:
- Previous weeks sales & weights of each week
- Planning Horizons
- Lead times & Calendars
- Promotions

Global Optimisations:
- Sales Thresholds
- **Visual rules**
- Minimum Displays

You can look over to visual rules values by store and product category

1| Go to Master Data -> Visual rules

2| Select the First Allocation tab

3| Download the list in an excel file for manual editing and upload it to the "Data upload" page
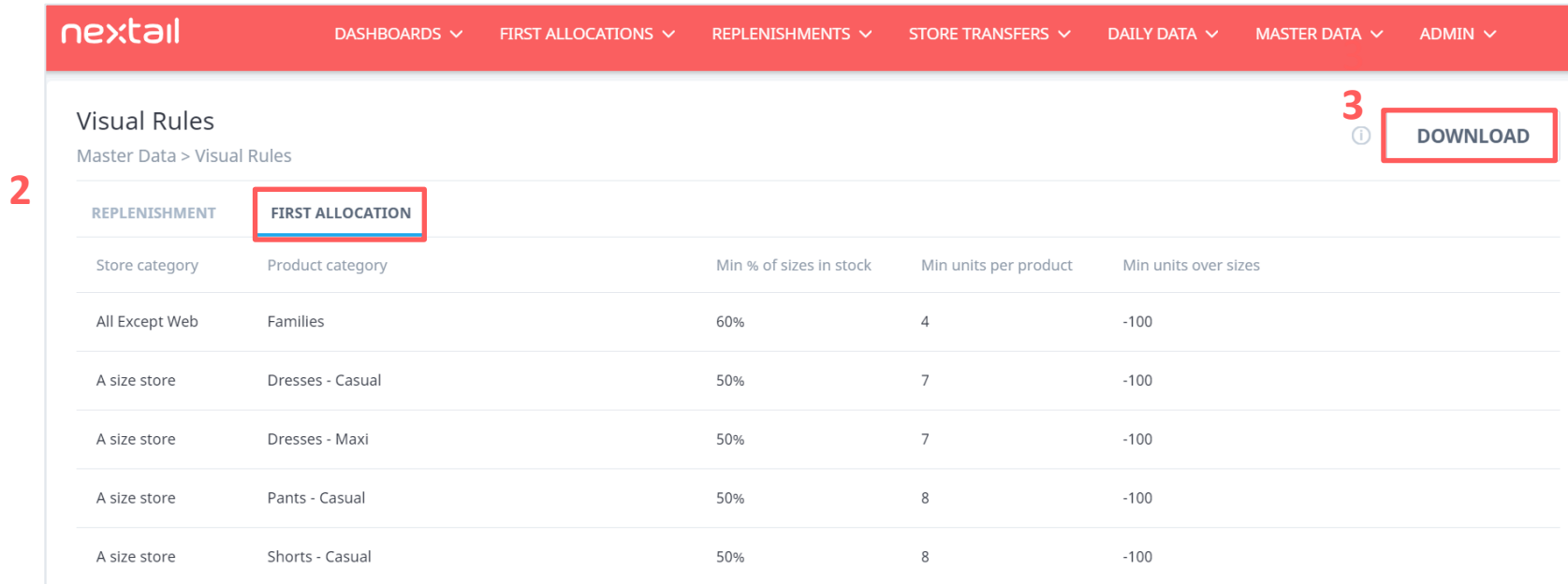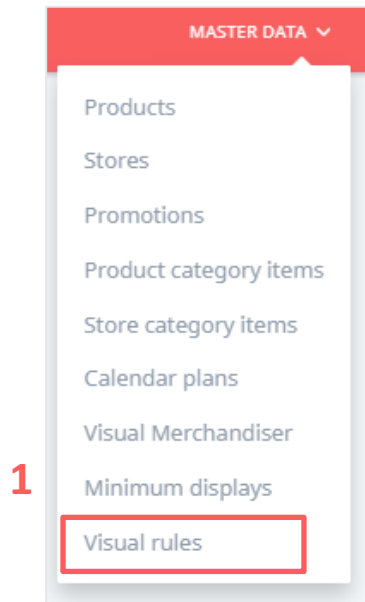
Store category	Product category	Min % of sizes in stock	Min units per product	Min units over sizes
All Except Web	Families	60%	4	-100
A size store	Dresses - Casual	50%	7	-100
A size store	Dresses - Maxi	50%	7	-100
A size store	Pants - Casual	50%	8	-100
A size store	Shorts - Casual	50%	8	-100

Directly in the platform

Demand Forecasting:
- Previous weeks sales & weights of each week
- Planning Horizons
- Lead times & Calendars
- Promotions

Global Optimisations:
- Sales Thresholds
- Visual rules
- **Minimum Displays**

The Minimum displays per store-product and module can be easily listed to verify the setup

1| Go to Master Data -> Minimum Displays, select First Allocation list
2| Apply a product category and/or store category filter to help you narrow the data
3| Download the data in an excel file to edit and upload in "Daily Data -> Data upload" page. Imp. Downloaded files are limited to the first 1,000,000 rows
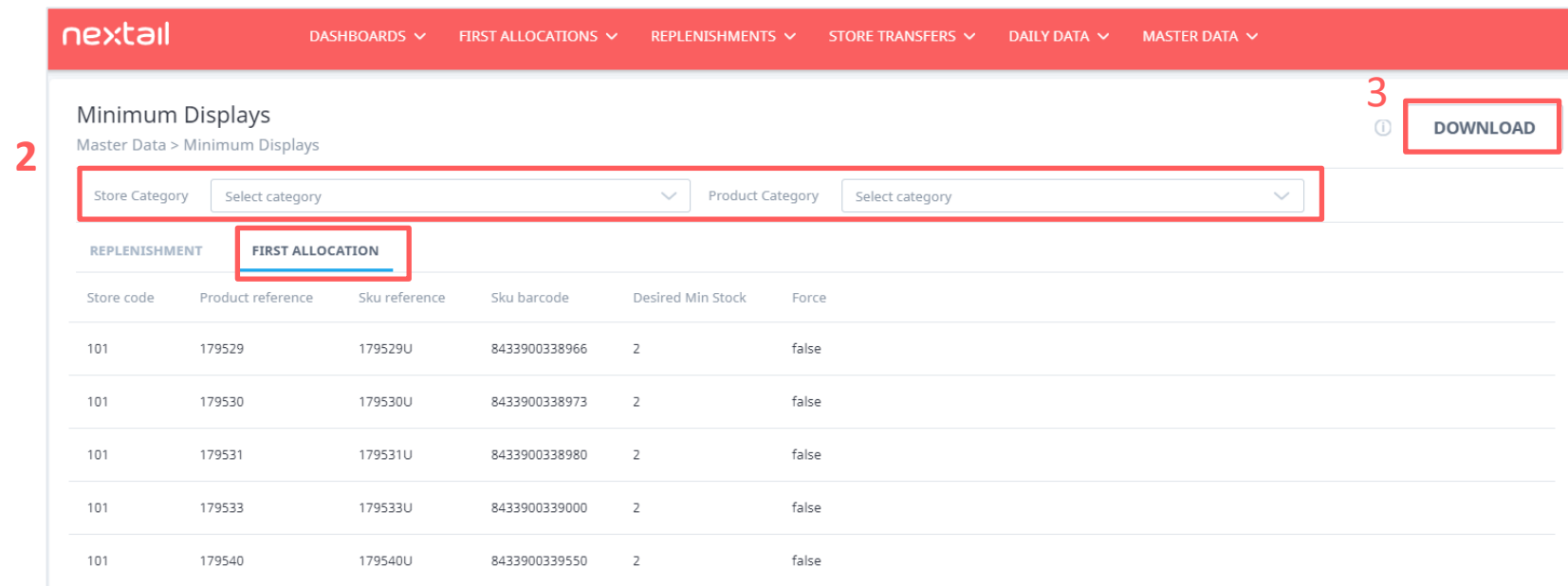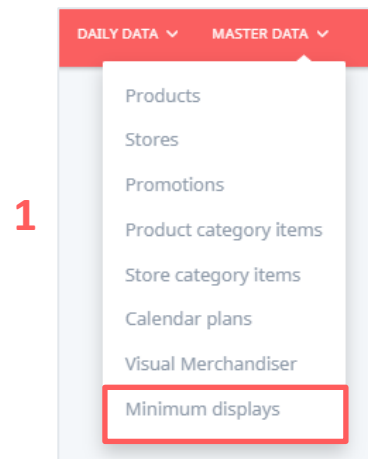
Data Uploads

Demand Forecasting:

- **Promotions**

Global Optimisations:

- Visual rules

- Minimum displays

You can create a batch of promotions by store and product category with an excel file in Data upload

1| Go to Daily Data > Data Upload, select the option "Promotions" and choose the file to be uploaded:
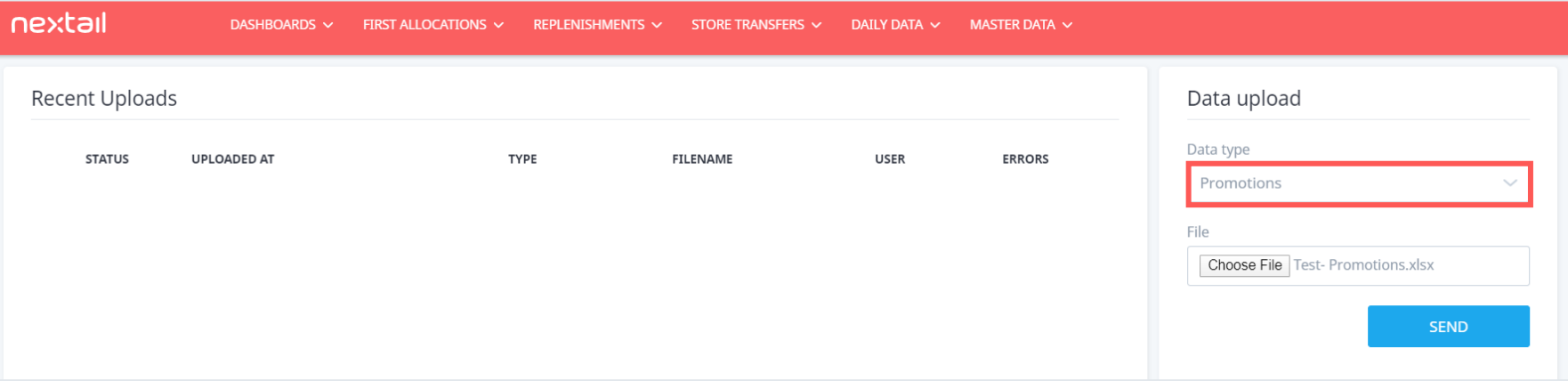
2| The file must contain 8 columns named exactly as in the picture below, so each line allows you to refer to a product-store category combination.

	A	B	C	D	E	F	G	H
	promotion_name	store_category	product_category	start_date	end_date	similar_promotion	coefficient	features
	Sales in Barcelona	Barcelona stores	Dresses	2020-03-26	2020-04-15		1.83	Barcelona
	Sales in Madrid	Madrid stores	Pants	2020-03-26	2020-04-15		1.83	Madrid

- All fields are compulsory except for similar_promotion
- You can specify a similar promotion in the past by their name
- By default, Nextail uses the previous 60 days to calculate the promotion.
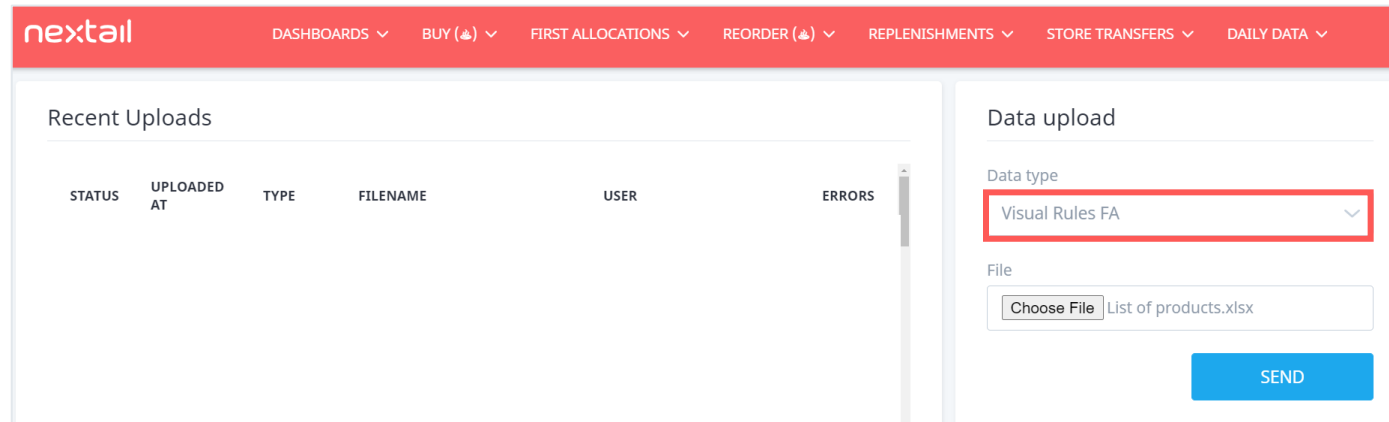
Data Uploads

Demand Forecasting:
- Promotions

Global Optimisations:

- **Visual rules**
- Minimum displays

You can update the conditions of each product to display in the store with the visual rules option

1| Go to Daily Data > Data upload, select the option "Visual rules FA" and choose the file to be uploaded:

2| We recommend using the same file that was downloaded from the Visual rules page in Master data as it will help us avoid errors in the update process:

	A	B	C	D	E
1	StoreCategoryName	ProductCategoryName	MinSizesPercentageInStockFa	MinUnitsPerProductFa	UnitsOverSizeNumberFa
2	All except web	Families	60%	4	-100
3	A size store	Dresses - Casual	50%	7	-100
4	A size store	Dresses - Maxi	50%	8	-100

- **Min. sizes percentage in stock Fa:** minimum percentage of the size curve to display in the store
- **Min units per product Fa:** minimum number of units to display in the store
- **Units over size number Fa:** additional units over the size count. Value used for the calculation of min. units per product
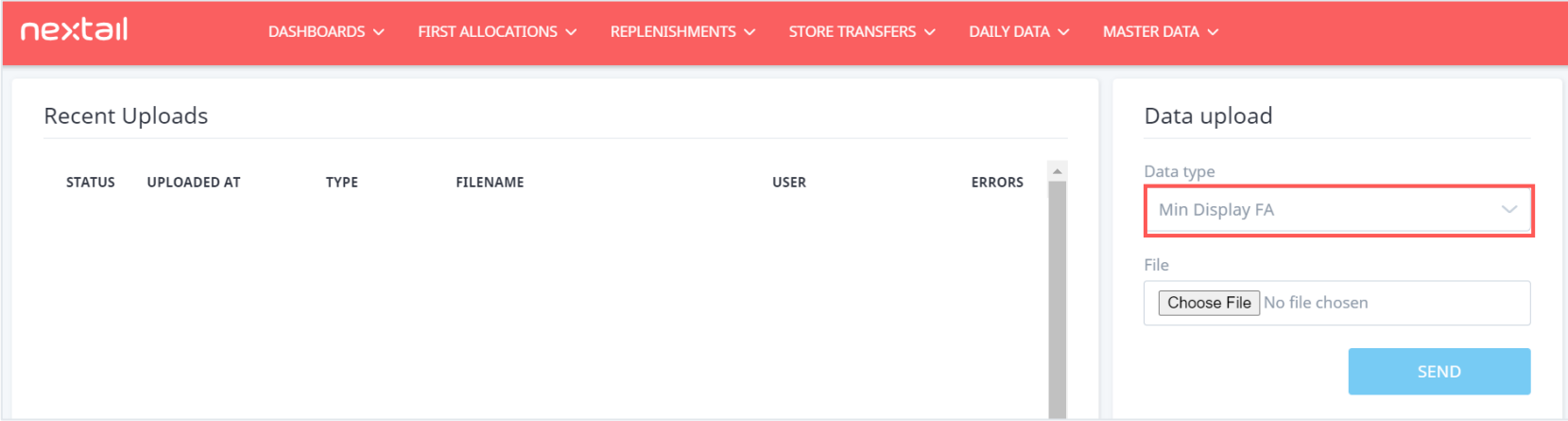
Data Uploads

Demand Forecasting:
- Promotions

Global Optimisations:
- Visual rules
- **Minimum displays**

Data upload is used for setting Minimum Displays which would allow us to apply a minimum for each SKU in each store

1| Go to Daily Data > Data Upload, select the option "Min Display" and choose the file to be uploaded.

2| The file must contain all the columns of the downloadable file from "Minimum displays" page and have data at least in those columns highlighted in yellow as in the picture below, so each line allows you to refer to a sku-store combination:

- • **ProductRef:** Is the product reference
- • **SKURef**: Is the product reference by sku.
- • **SKUBarcode:** Is the barcode number of the sku
- • **StoreCode**: The code of the store.
- • **Desired_min**: Is the minimum number of units per sku-store.
- • **Force**: More restrictive, if this quantity of minimum display cannot be achieved, no units are sent. "1" = True and "0" "False"

Please note that the status for all recent data upload can be seen on the left side of the Data Upload screen

- The list is sorted by date and hour

- Following, the meaning of each status:

  - In progress (**Yellow**): Information sent and charging is in process. At the end of the load, the status will change
  - Upload Failed (**Red**): Information has not been sent, it can be an error in the format file or lack of columns, etc
  - Completed with errors (**Green**): Load partial data because there are (x) lines with errors. Click on the download icon to see details
  - Completed successfully (**Green**): The 100% of the upload was completed without errors.

Through your Nextail Services team

Demand Forecasting:
- Comparable products

Global Optimisations:
- Prepacks
- Other conditions

Nextail services team support the configuration or changes for some of the criteria

	Current Values	**Change request**
Comparable products	Default comparable products based on tags	User will email Nextail services team
Prepacks	Defined in the File Master	At the First Allocation kick off
Other conditions:	Customized by the customer	At the First Allocation kick off
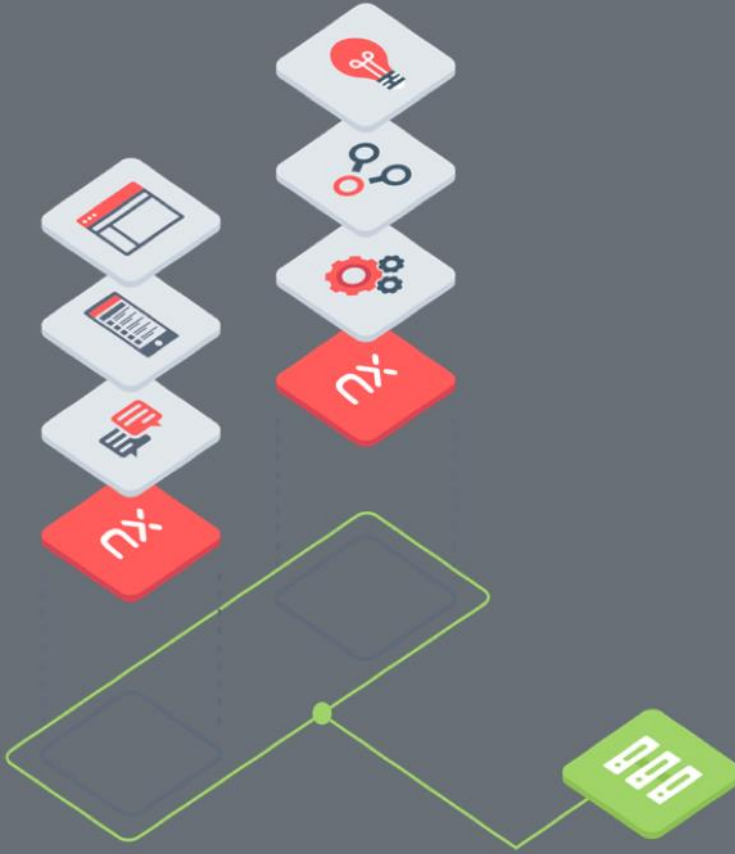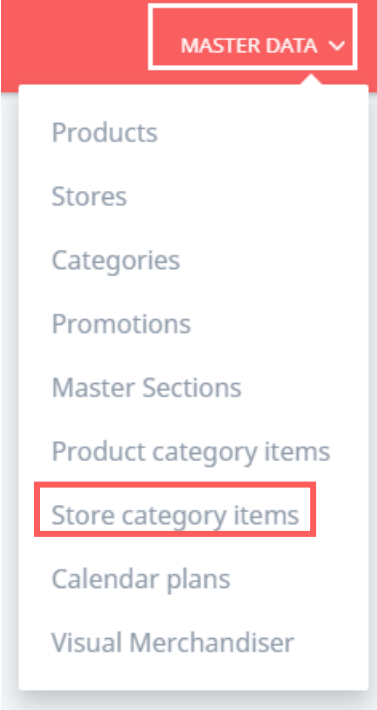
Other conditions:
- Max. order
- Min. order
- Max. stock

Content

1	Category Management
2	First Allocation optimisation
3	Inputting data into the platform
4	**Use cases**
5	Next steps

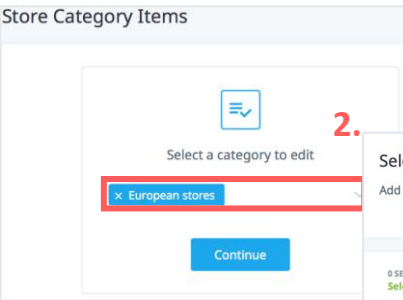# You can add stores in the new layout of products with first allocation

A category creation made by Nextail is needed to assign stores for the new layout.

1| Go to Master Data, select "Store category item" and choose the new category

2| Select the desired stores to be included. Once finished click the "Done" button

3| In the step 3 of the scenario, you can assign stores to the products that will be allocated
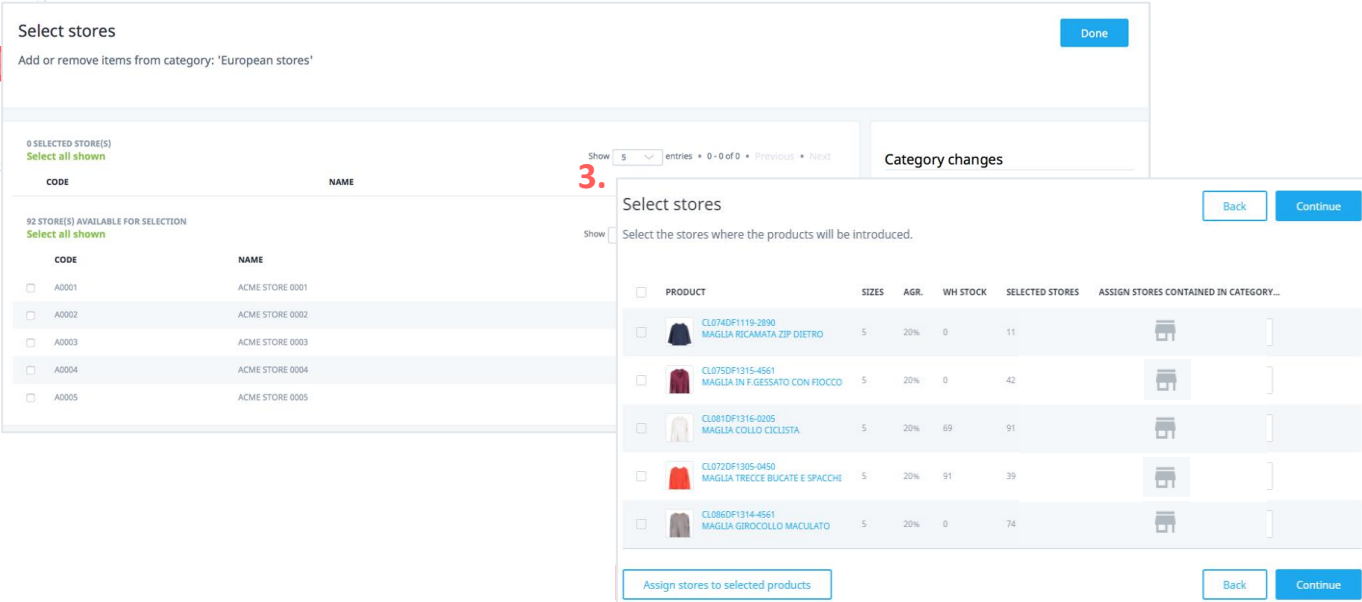
Complete sizes from past seasons products that are in the stockrooms

1| List the products of past seasons with real stockout in Top products report
2| Request the creation of a product category to Nextail and use the option "Bulk assign" in Master Data –> Products to fill the category with product references.
3| Select the product category in the step 1 to run an optimisation and when the scenario is finished, a validation of units per store can be seen in the review allocation page

1.
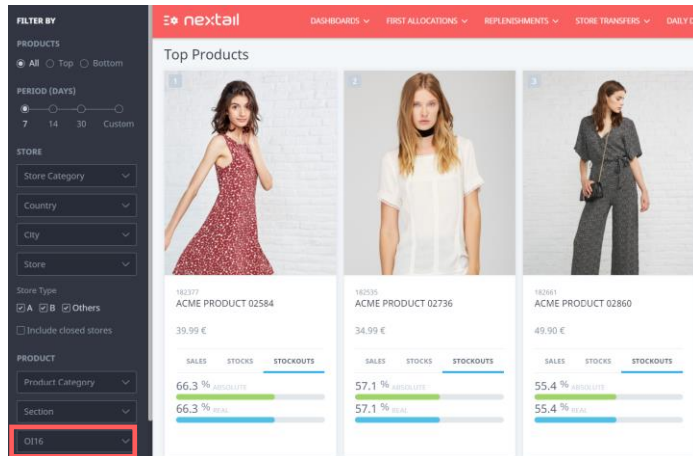
2.

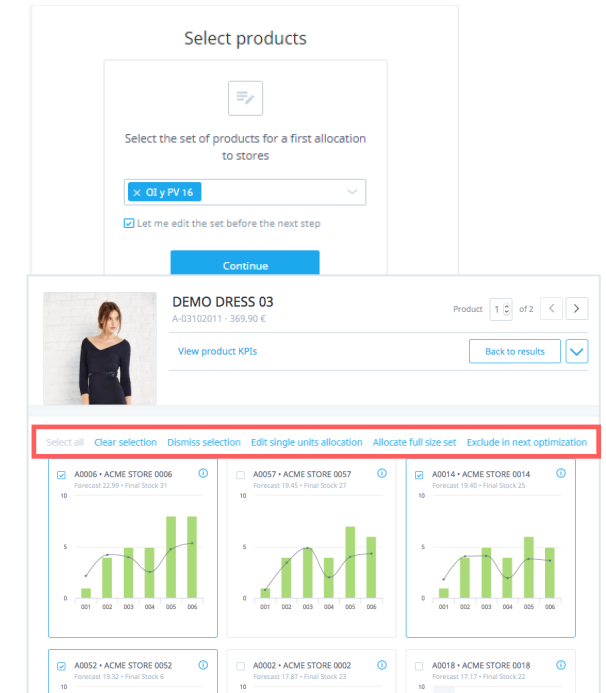**3.**

Allocate available carryover products in warehouse to stores

1.
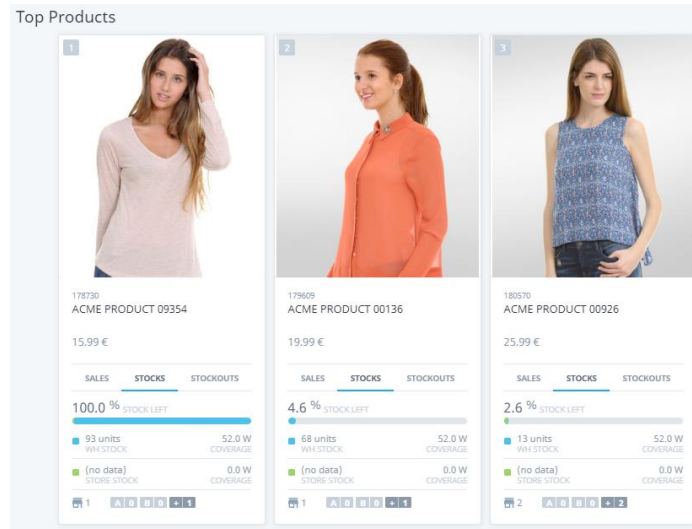
2.

1| List the carry over products to allocate

2| Request the creation of a product category to Nextail and use the option "Bulk assign" in Master Data –> Products to fill the category with product references.

Content

1 Category Management

2 First Allocation optimisation

3 Inputting data into the platform

4 Use cases

5 **Next steps**

As a reminder, this session should leave you feeling confident on the following points:

○ Understand how Nextail uses categories to give flexibility on data management by stores & products

○ Be able to run a First Allocation optimisation

○ Review & download results of a First Allocation optimisation

○ Feel comfortable inputting some criteria directly within the platform

○ Feel comfortable uploading criteria into the platform through data files

Did we achieve our goals?

? Understand how Nextail uses categories to give flexibility on data management by stores & products

? Be able to run a First Allocation optimisation

? Review & download results of a First Allocation optimisation

? Feel comfortable inputting some criteria directly within the platform

? Feel comfortable uploading criteria into the platform through data files