

# nextail

Running an Optimisation & Adding Inputs

November 2020

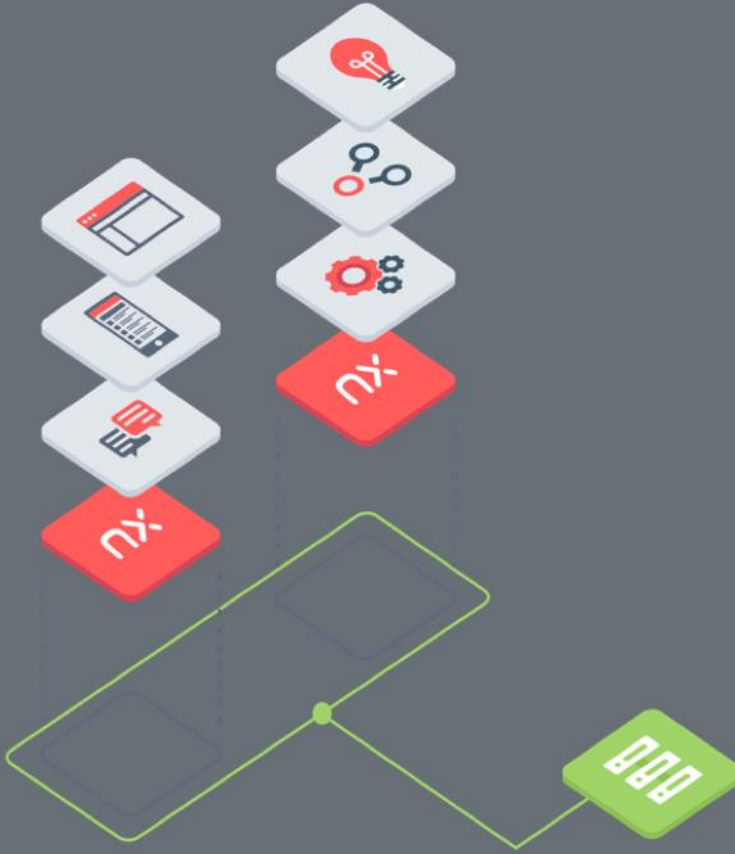
Private and confidential





## 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

- 1 Type of categories
- 2 Category creation
- 3 Category edition

### 2 First Allocation optimisation

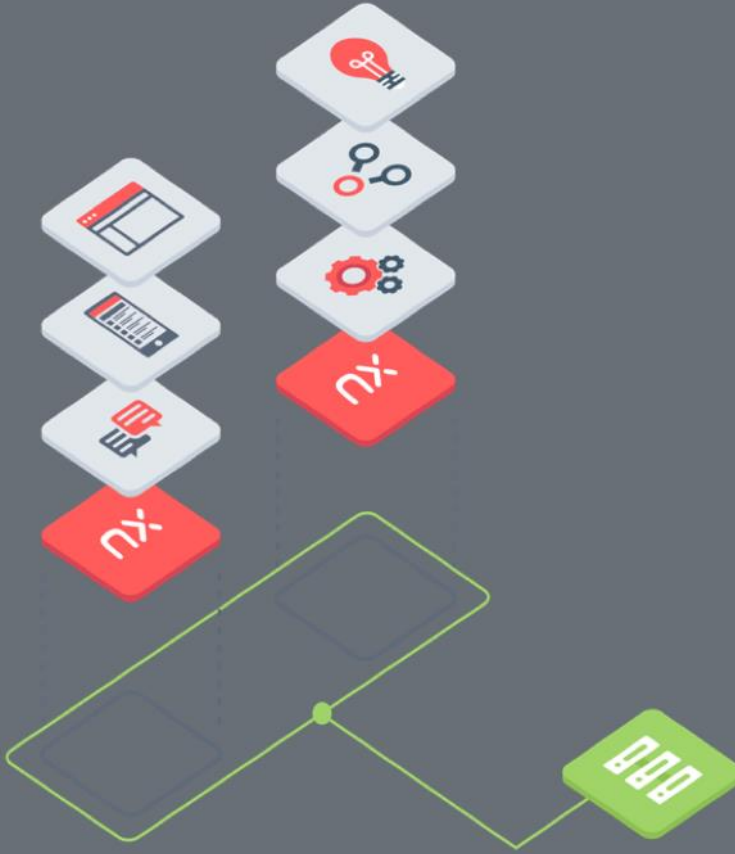
### 3 Inputting data into the platform

### 4 Use cases

### 5 Next steps

*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

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### 4 Use cases

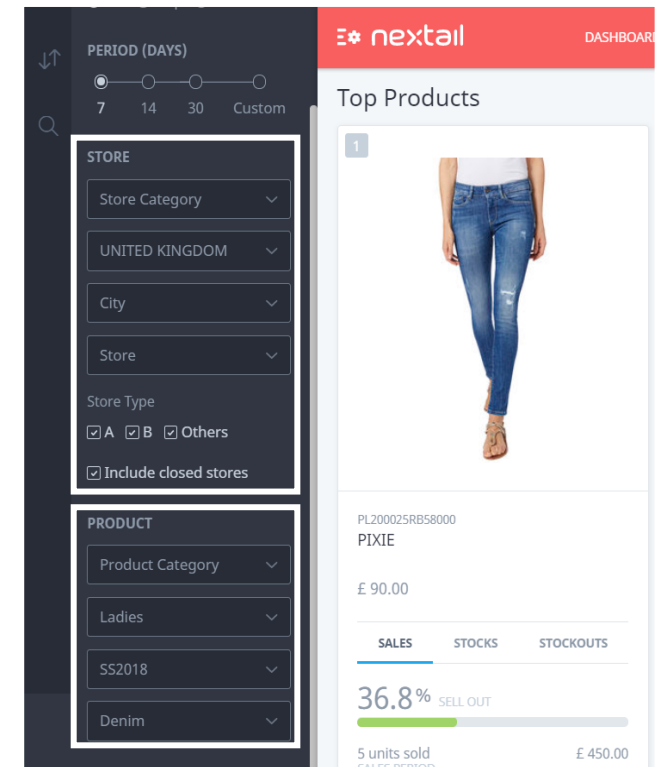
### 5 Next steps

# 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

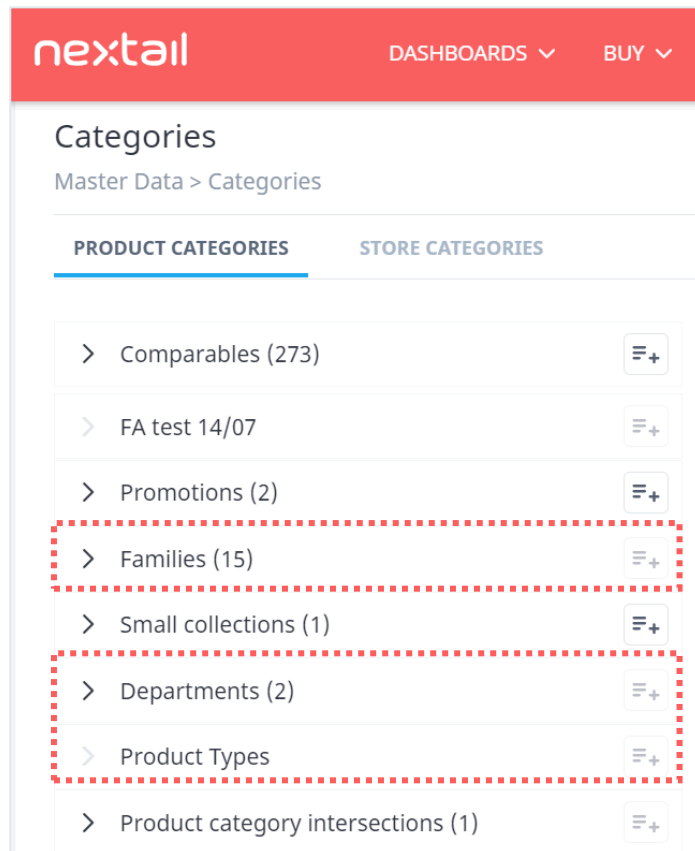
- **Automatic categories:** created based on product or store attributes shared in the master files
  - Created automatically
  - Updated automatically everyday
- **Manual categories:** created ad-hoc when we need to group a selection of stores or products
  - Created by Nextail per customer request
  - Filled and updated by Nextail or by the customer

Example of filters in Top Products report:

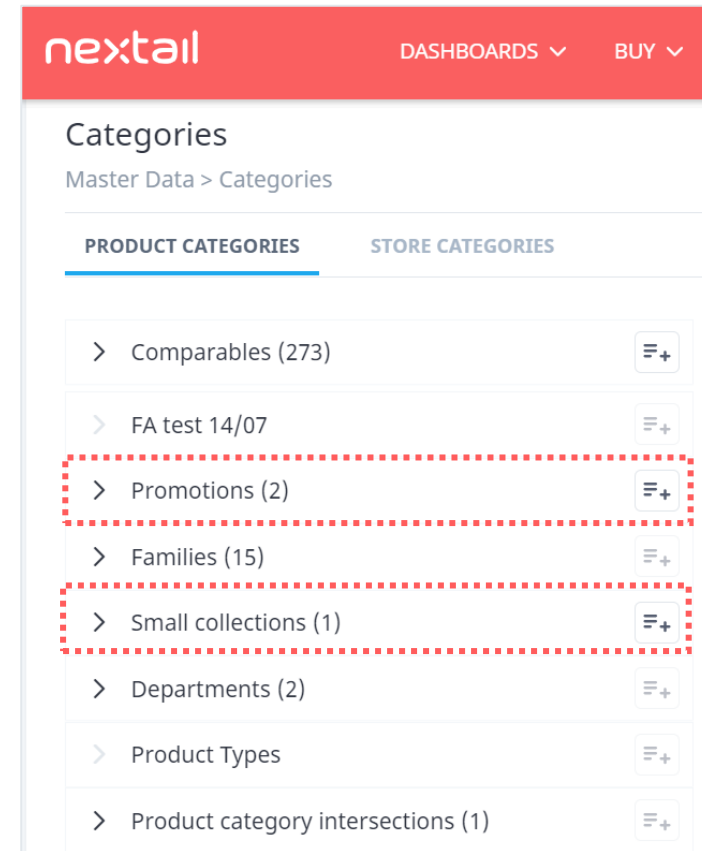


# Product categories allow us to see data aggregated by departments, collections or any combination of products

- Automatic categories: Families, Departments, Product types

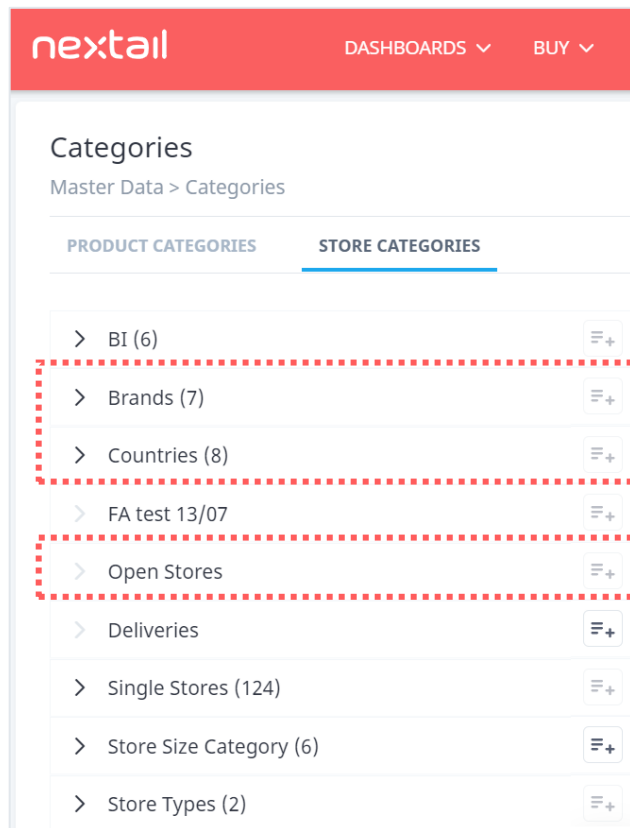


- Manual categories: promotions, small collections

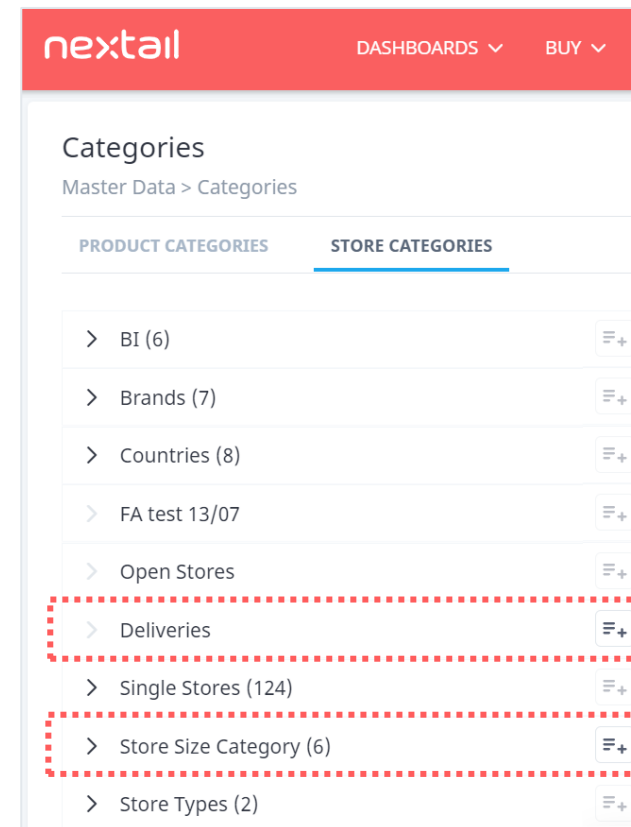


# Store categories allow us to see data aggregated by countries, store sizes or any combination of stores

- Automatic categories: brands, countries, open stores



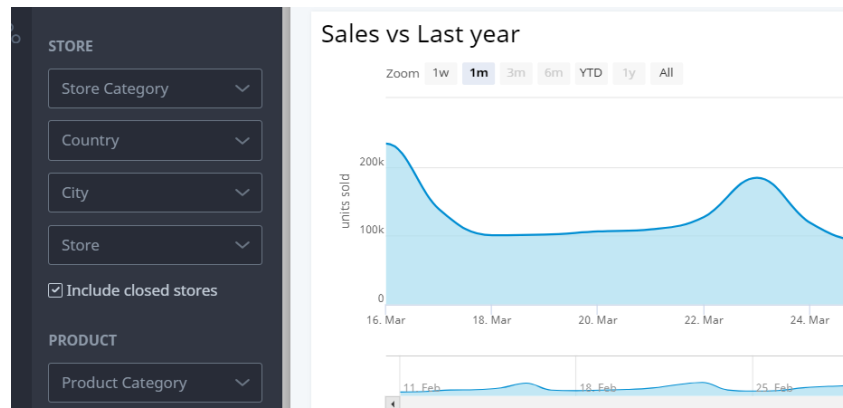
- Manual categories: deliveries, store size category





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

## Viewing data within the dashboard



## Running dummy scenarios

### FORECAST PARAMETERS

Seasonal coefficient 1	Planning horizon 12	Forecast weeks 3
Week 1 25	Week 2 30	Week 3 45

Planning horizon by store     Same weight for all weeks

3 best sales week

## Downloading relevant data from the platform

The screenshot shows a 'Blockages' table with filters for 'STORE' (Store Category, Country, City) and 'PRODUCT' (Product Category, Section). There are 'Block' and 'Unblock' buttons. The table has columns for 'STATUS', 'PRODUCTS', and 'FAMILY'. The data rows show 'Jersey Tops and Bottoms' with various status indicators (green and red dots).

	STATUS	PRODUCTS	FAMILY
<input type="checkbox"/>	●	293177	Jersey Tops and Bottoms
<input type="checkbox"/>	●	293177	Jersey Tops and Bottoms
<input type="checkbox"/>	●	293177	Jersey Tops and Bottoms
<input type="checkbox"/>	●	293177	Jersey Tops and Bottoms
<input type="checkbox"/>	●	293177	Jersey Tops and Bottoms
<input type="checkbox"/>	●	293177	Jersey Tops and Bottoms

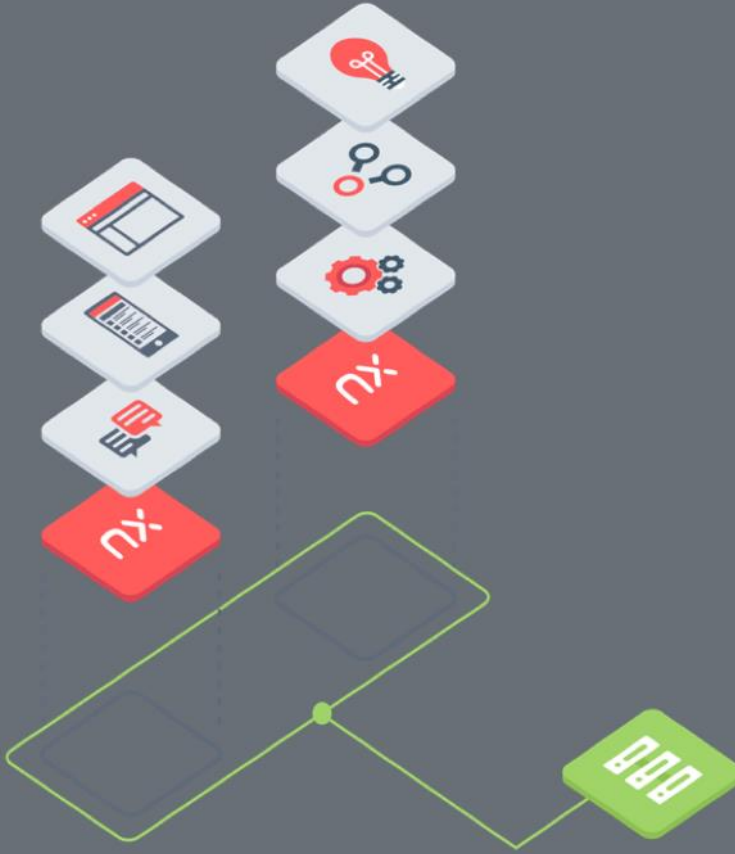
## Creating promotions

### Create a new promotion

Promotion name \*

Store Category \*

Product Category \*



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# 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”**

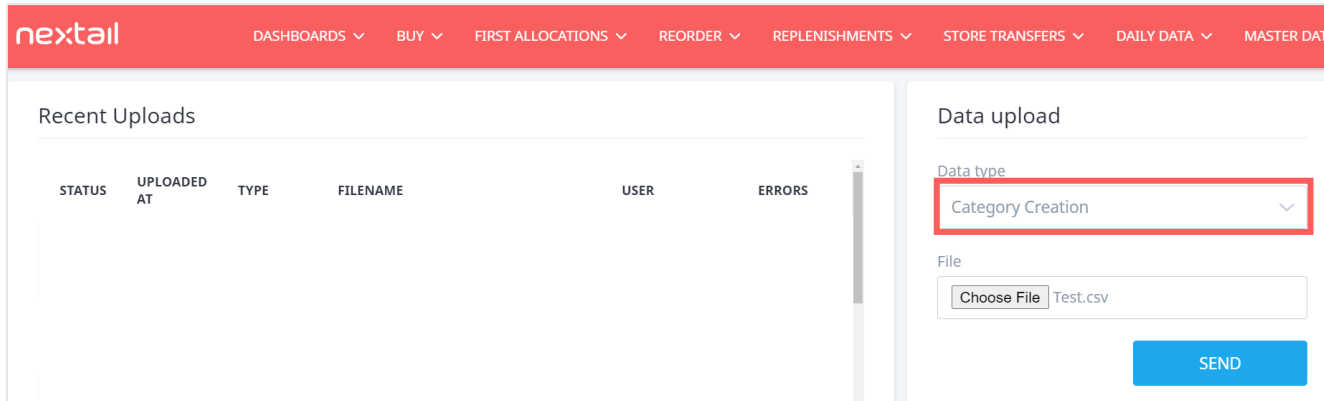
The screenshot shows the Nextail interface. At the top, there is a red navigation bar with the Nextail logo and several menu items: DASHBOARDS, BUY, FIRST ALLOCATIONS, REORDER, REPLENISHMENTS, STORE TRANSFERS, and DAILY. Below this, the 'Categories' page is displayed. The page title is 'Categories' and the breadcrumb is 'Master Data > Categories'. There are two tabs: 'PRODUCT CATEGORIES' (active) and 'STORE CATEGORIES'. A list of categories is shown, including 'Comparables (273)', 'FA test 14/07', 'Promotions (2)', 'Families (15)', 'Small collections (1)', 'Departments (2)', 'Product Types', and 'Product category intersections (1)'. The 'Small collections (1)' category is highlighted, and a 'Create category' button with a plus icon is visible next to it. A modal window titled 'Create child category' is open, showing a form for 'Small collections' with a 'Category name' input field and a 'CREATE' button. The 'CREATE' button is highlighted with a red border.

## 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.



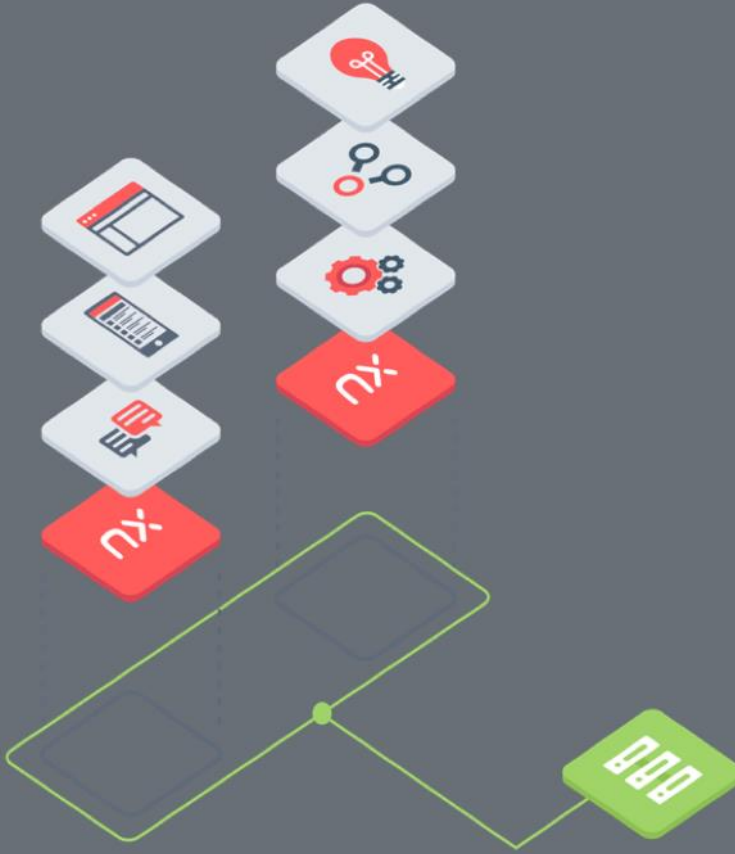
- The file must contain the following columns:

	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



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# 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.

Product	Full price	Current price	Sales threshold	Family	Season
<input type="checkbox"/> ACME PRODUCT 03945 100013	15.99	15.99	0%	PASMINAS Y PAÑUELOS	OI12
<input type="checkbox"/> ACME PRODUCT 03946 100015	15.99	15.99			

# Also make editions by adding or removing within the category on the category items page

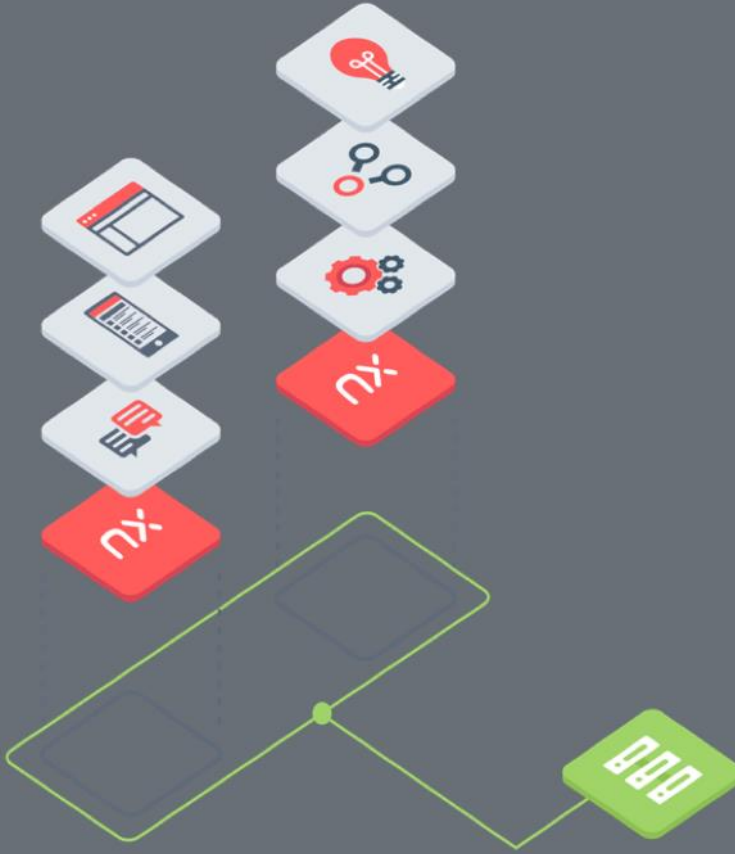
- In Master Data column, select **Product/Store category items** option
- Select an editable category (manual category)
- Use the filters to list the products you want to add and/or click on the checkbox to remove a product.
- As you select, the list of products will appear on the right-side panel to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

The screenshot displays the 'Product category items' interface in the Nextail system. The top navigation bar includes 'nextail' and menu items: 'DASHBOARDS', 'BUY', 'FIRST ALLOCATIONS', 'DAILY DATA', and 'MASTER DATA'. The main content area is titled 'Product category items' and features a 'Select a category to edit' dropdown menu with 'Promotions - Women' selected. A 'Continue' button is located below the dropdown. To the right, a sidebar menu lists various options, with 'Product category items' highlighted in red. The main panel shows a 'Select products' section for the 'Promotions - Women' category. It includes a table of 5 selected products and 7 products available for selection. The table columns are 'PRODUCT', 'FAMILY', 'SEASON', and 'SIZE'. The first product, 'DRESS 77597', is selected and highlighted with a red box. The second product, 'DRESS 78024', is also highlighted with a red box. The third product, 'BLOUSE 78722', is highlighted with a red box. The fourth product, 'DRESS 79984', is highlighted with a red box. The fifth product, 'BLOUSE 80167', is highlighted with a red box. The table below shows 7 products available for selection, with the first product, 'COATS&JACKETS 72325', highlighted with a red box. On the right side, a 'Category changes' panel shows a 'Save' button and a list of items to be removed (DRESS 77597) and items to be added (COATS&JACKETS 72325).

PRODUCT	FAMILY	SEASON	SIZE
<input checked="" type="checkbox"/> DRESS 77597 SS2077597	DRESS	SS20	38, 40, 42, 44, 46, 48, 50
<input type="checkbox"/> DRESS 78024 SS2078024	DRESS	SS20	S, M, L, XS, XL
<input type="checkbox"/> BLOUSE 78722 SS2078722	BLOUSE	SS20	38, 40, 42, 44, 46, 48, 50
<input type="checkbox"/> DRESS 79984 SS2079984	DRESS	SS20	S, M, L, XS, XL
<input type="checkbox"/> BLOUSE 80167 SS2080167	BLOUSE	SS20	S, M, L, XS, XL, XXL

PRODUCT	FAMILY	SEASON	SIZE
<input checked="" type="checkbox"/> COATS&JACKETS 72325 Misc72325	COATS&JACKETS	Misc	38, 40, 42, 44, 46, 48, 50
<input type="checkbox"/> COATS&JACKETS 76303 Misc76303	COATS&JACKETS	Misc	38, 40, 42, 44, 46, 48



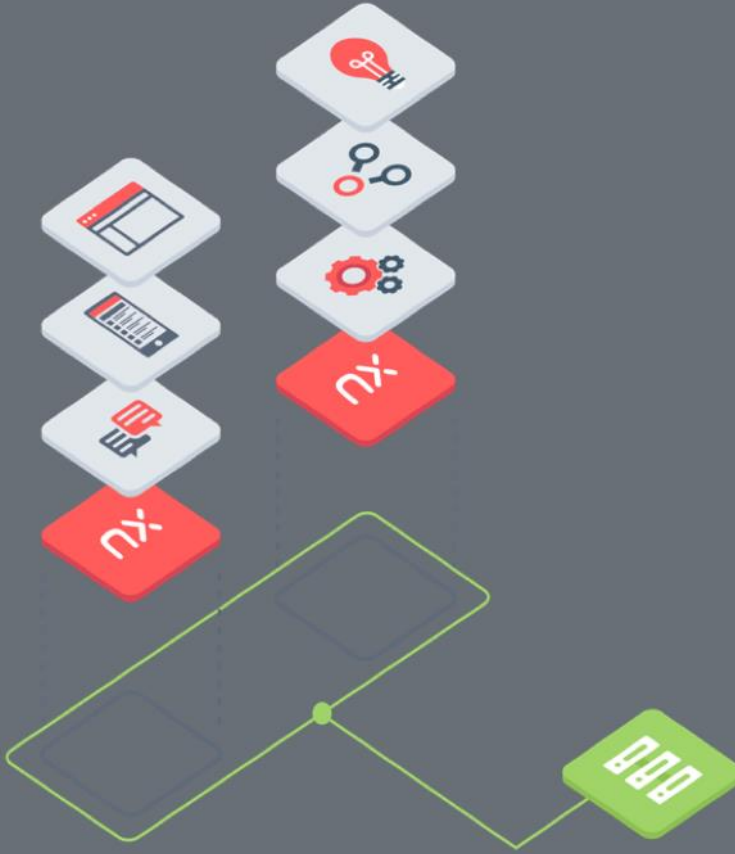
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A *First Allocation optimisation* is a process that you run through  
Nextail's platform

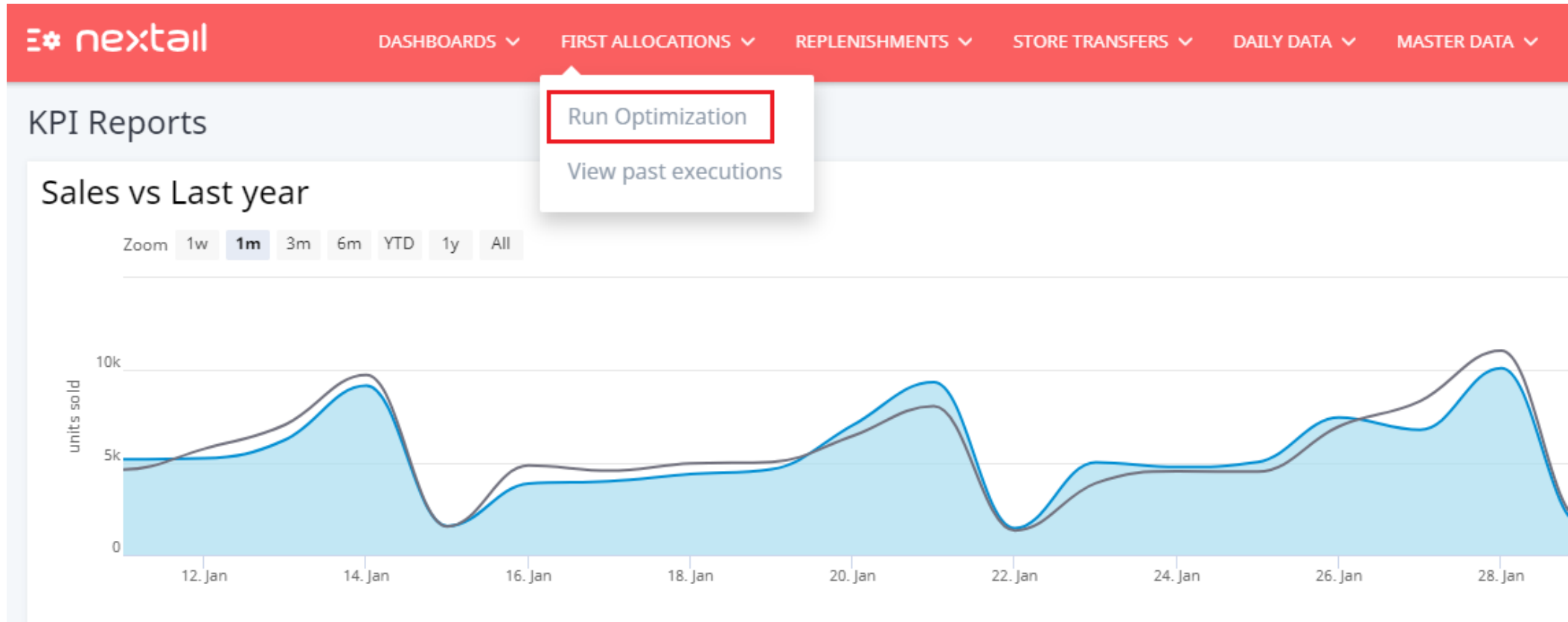
We call it an optimisation because it *adds the strength of our  
algorithms* to your current decisions



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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

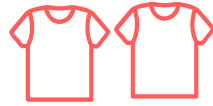
1



## 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

The screenshot shows a two-step process for selecting products. Step 1 is a 'Select products' dialog box with a search bar containing 'Ol y PV 16', a checked checkbox 'Let me edit the set before the next step', and a 'Continue' button. Step 2 is the main 'Select products' screen, which displays two tables of products. The first table, '1675 SELECTED PRODUCT(S)', lists three products with columns for Product, Family, Season, Type, Size, WH Stock, Stores Stock, and Price. The second table, '8824 PRODUCT(S) AVAILABLE FOR SELECTION', lists two products with similar columns. A 'Category changes' sidebar on the right shows 'ITEMS TO BE REMOVED - 0' and 'ITEMS TO BE ADDED - 1'. Numbered callouts 1-4 highlight the search bar, the checkbox, the 'Add' icon in the second table, and the 'Continue' button respectively.

PRODUCT	FAMILY	SEASON	TYPE	SIZE	WH STOCK	STORES STOCK	PRICE
ACME PRODUCT 10004 179512	COMPLEMENTOS/OTROS	PV16	U	16	16	36	15.99
ACME PRODUCT 00875 18013	COMPLEMENTOS/OTROS	PV16	U	64	64	71	15.99
ACME PRODUCT 01086 180745	PASMINAS Y PAÑUELOS	PV16	U	12	12	82	15.99





  


PRODUCT	FAMILY	SEASON	TYPE	SIZE	WH STOCK	STORES STOCK	PRICE
ACME PRODUCT 03945 100012	PASMINAS Y PAÑUELOS	0212	U		0	0	15.99
ACME PRODUCT 03946 100015	PASMINAS Y PAÑUELOS	0212	U		0	0	15.99

- 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**

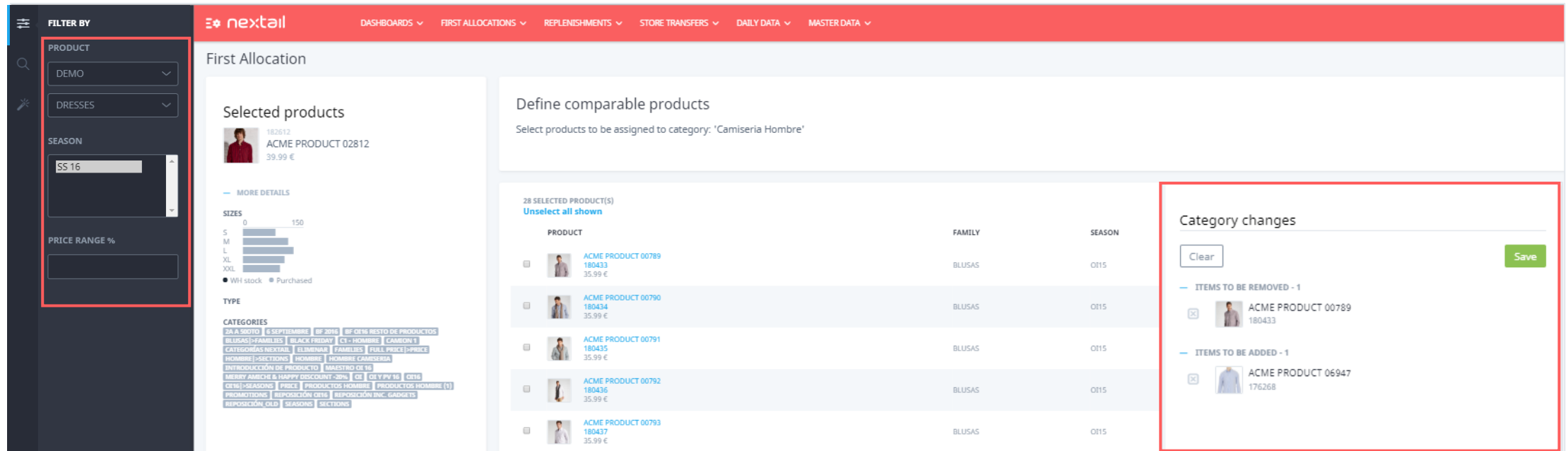
<input type="checkbox"/>	PRODUCT	PRICE	FAMILY	COMPARABLE PRODUCT CATEGORY
<input type="checkbox"/>	 A-02503021 DEMO DRESS 01	399.90 €	DRESSES	<input type="text" value="× Similar to A-02503021 - DEMO DRESS"/> 
<input type="checkbox"/>	 A-03102011 DEMO DRESS 03	369.90 €	DRESSES	<input type="text" value="× Similar to A-03102011 - DEMO DRESS"/>
<input type="checkbox"/>	 A-03103021 DEMO DRESS 05	459.90 €	DRESSES	<input type="text" value="× Similar 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

Select stores

Select the stores where the products will be introduced.

<input type="checkbox"/>	PRODUCT	SIZES	AGR.	WH STOCK	SELECTED STORES	ASSIGN STORES CONTAINED IN CATEGORY...
<input type="checkbox"/>	CL074DF1119-2890 MAGLIA RICAMATA ZIP DIETRO	5	20%	0	11	1.
<input type="checkbox"/>	CL075DF1315-4561 MAGLIA IN F.GESSATO CON FIOCCO	5	20%	0	42	
<input type="checkbox"/>	CL081DF1316-0205 MAGLIA COLLO CICLISTA	5	20%	69	91	
<input type="checkbox"/>	CL072DF1305-0450 MAGLIA TRECCE BUCATE E SPACCHI	5	20%	91	39	
<input type="checkbox"/>	CL086DF1314-4561 MAGLIA GIROCOLLO MACULATO	5	20%	0	74	

2. Assign stores to selected products

Back Continue

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

Assign store category

Category

× European stores

Assign stores in category Cancel

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

**Calculate first allocation**

Please enter the parameters you want to be used for the calculation.

**1.** FIRST ALLOCATION SCOPE

Brand: Acme | Warehouse: Almacen Central | Store category: Store category

Calendar plan: First Allocation

**2.** FORECAST PARAMETERS

Planning horizon: 21 | Forecast weeks: 3

Planning horizon by store |  Same weight for all weeks

Week 1: 25 | Week 2: 30 | Week 3: 45

3 best sales week

**3.** OPTIONS

Enable multi sales threshold

0 3 5 7 10 13 15 20 25 30

**4.** Back Calculate

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

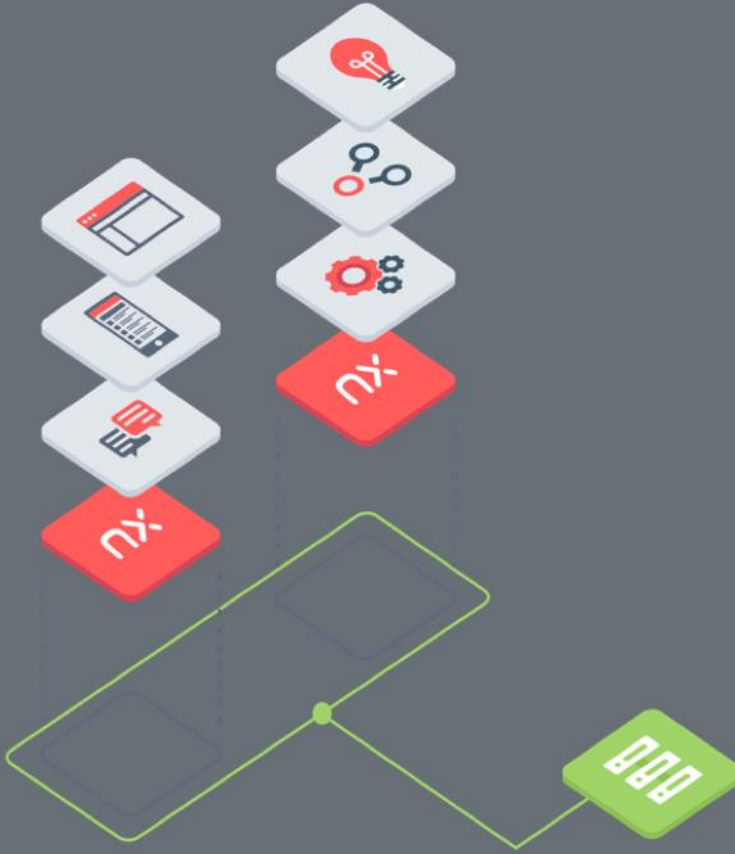
- Brand
- Warehouse
- Store category: can be left empty as you will have selected the stores in the previous step. Fill it only if all the products in the scenario need to be sent to the same stores.
- Calendar plan: a calendar plan must be selected to be able to process the order

## 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

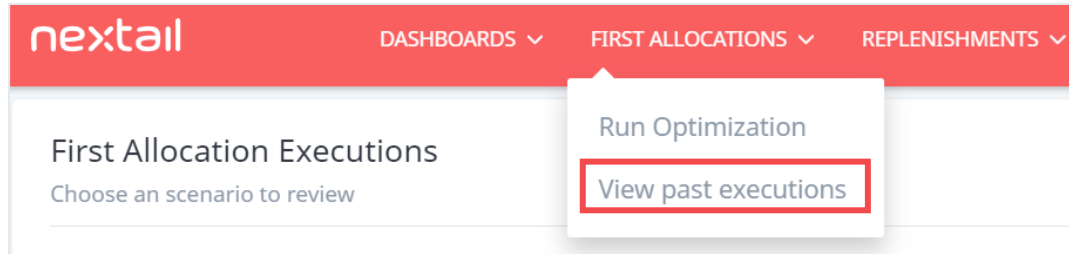


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# Optimisation results can be reviewed in the “View past executions” option within the “First Allocations” menu

1| Select “View past executions” from the “First Allocations” menu:



2| Select the desired execution from the list :

The screenshot shows the Nextail interface with a table of 'First Allocation Executions'. The table has columns for Status, Scenario ID, Date, User, Product category, Stores, Products, and Units. The first row is highlighted with a red box.

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

**Scenario 2005**  
13 Apr • virginia@nextail.co  
Status

1. **Summary:** STORES 20, PRODUCTS 2, SKUS 10, TOTAL UNITS 156, TODAY UNITS 156

2. **Product / Store tab:** PRODUCTS, STORES (20)

3. **Product detail:** A-03301091 DEMO SKIRT 11

4. **Update WH stocks** (button)

5. **Review allocations** (button)

6. **Result Files:** Regenerate files, Download

	AGGRESSIVITY	UNITS	Sent / WH Stock	STORES	Sent / Selected
<b>DRESSES (1)</b>					
A-03102011 DEMO DRESS 03	25%	12%	70 out of 599	100%	10 out of 10
<b>SKIRTS (1)</b>					
A-03301091 DEMO SKIRT 11	15%	10%	86 out of 825	65%	17 out of 26

- 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**

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

**STORES**

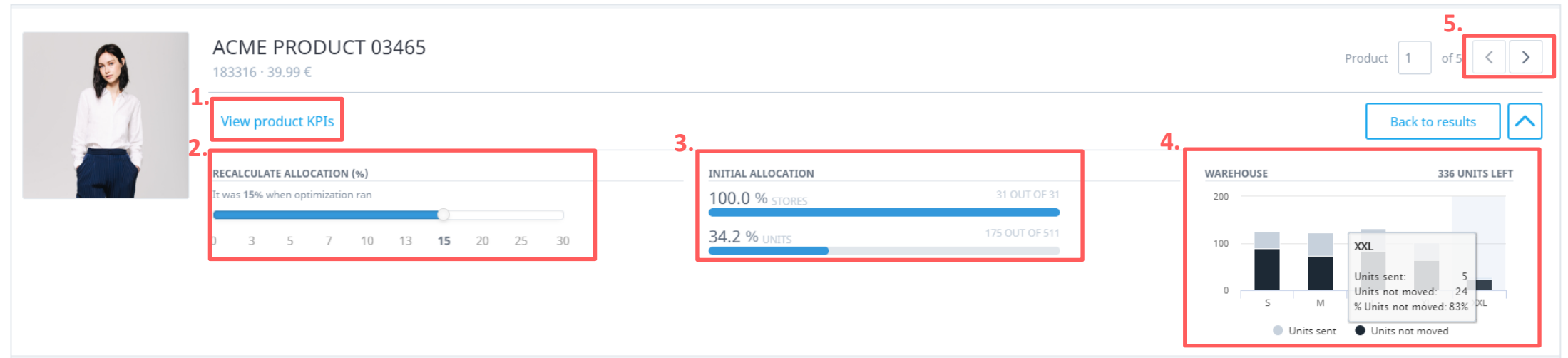
STORE	1. In store			2. Sent in FA		3. Total	
	PRODUCTS	UNITS	COV (W)	PRODUCTS	UNITS	PRODUCTS	UNITS
- 401 - ACME STORE 084		0	0.00	5	24	5	24
BLUSAS	0	0	0.00	3	14	3	14
PASMINAS Y PAÑUELOS	0	0	0.00	2	10	2	10
+ 452 - ACME STORE 125		0	0.00	5	24	5	24

+ 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

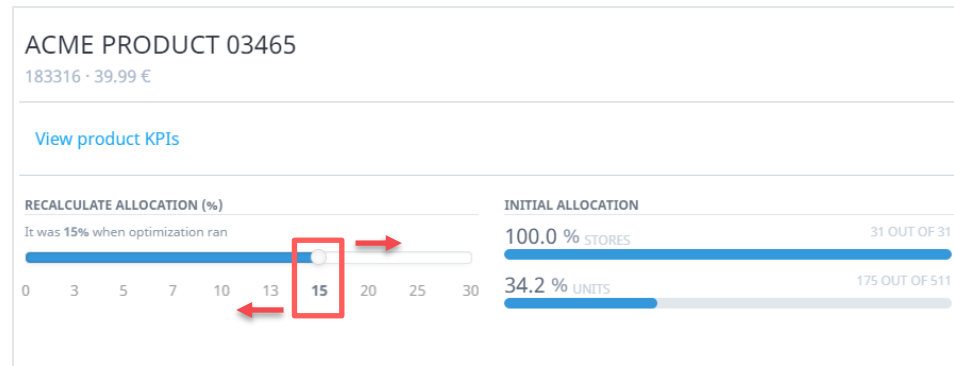
- 1| Current Store stock: # of products, units and coverage in weeks
- 2| # of products and units to be sent if scenario is executed
- 3| Situation after execution: "In Store" + "Sent in FA"

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

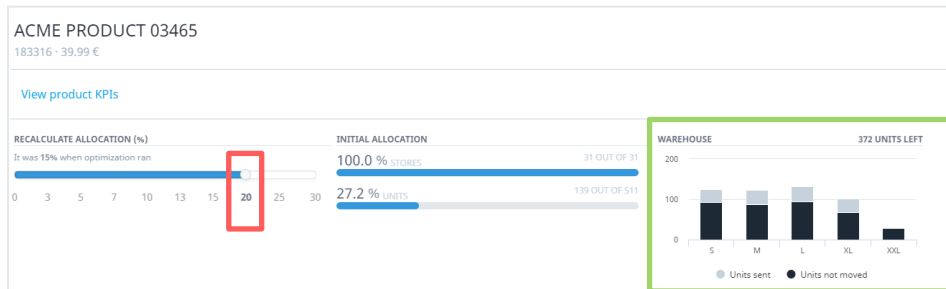


- 1 | Navigate to KPI dashboard with stock and sales history for this product
- 2 | Sales Threshold (%): move the bar to see the impact in the allocation scenario
- 3 | Stores: # and % stores allocated out of selected.  
Units: # and % units allocated out of total bought.
- 4 | Warehouse stock by size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

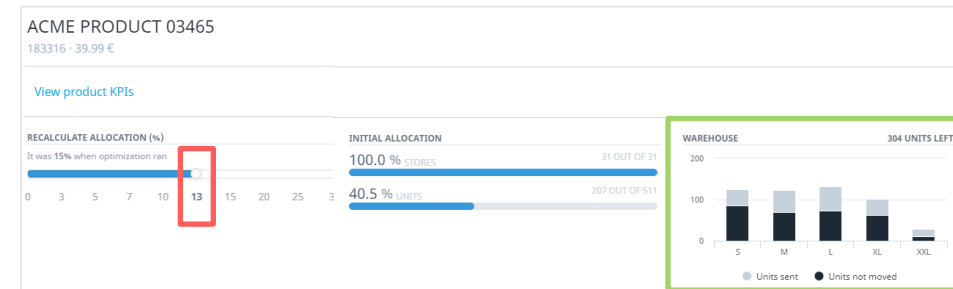
You can quickly edit the allocation for a given product by using the Sales Threshold bar, and see the impact recalculated on the fly



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

DEMO SKIRT 11  
A-03301091 · 269.90 €

Product 2 of 2

View product KPIs

Back to results

Review allocations

1. Select all Clear selection Dismiss selection Edit single units allocation Allocate full size set Exclude in next optimization

2. A0014 • ACME STORE 0014 Forecast 5.96 • Final Stock 10

Unit	Allocation
001	1
002	2
003	2
004	1

3. A0012 • ACME STORE 0012 Forecast 5.58 • Final Stock 10

Unit	Allocation
001	1
002	2
003	2
004	1

A0020 • ACME STORE 0020 Forecast 5.05 • Final Stock 10

Unit	Allocation
001	1
002	2
003	2
004	1

A0028 • ACME STORE 0028 Forecast 5.04 • Final Stock 10

Unit	Allocation
001	1
002	2
003	2
004	1

A0031 • ACME STORE 0031

A0092 • ACME STORE 0092

A0048 • ACME STORE 0048

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

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.

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

DEMO DRESS 03  
A-03102011 - 369.90 €

Product 1 of 2

View product KPIs

Back to results

Select all Clear selection Dismiss selection Edit single units allocation Allocate full size set Exclude in next optimization

Store ID	Forecast	Final Stock	Selected
A0006 • ACME STORE 0006	22.99	31	Yes
A0057 • ACME STORE 0057	19.45	27	No
A0014 • ACME STORE 0014	19.40	25	Yes
A0052 • ACME STORE 0052	19.32	6	No
A0002 • ACME STORE 0002	17.87	23	No
A0018 • ACME STORE 0018	17.17	22	No

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

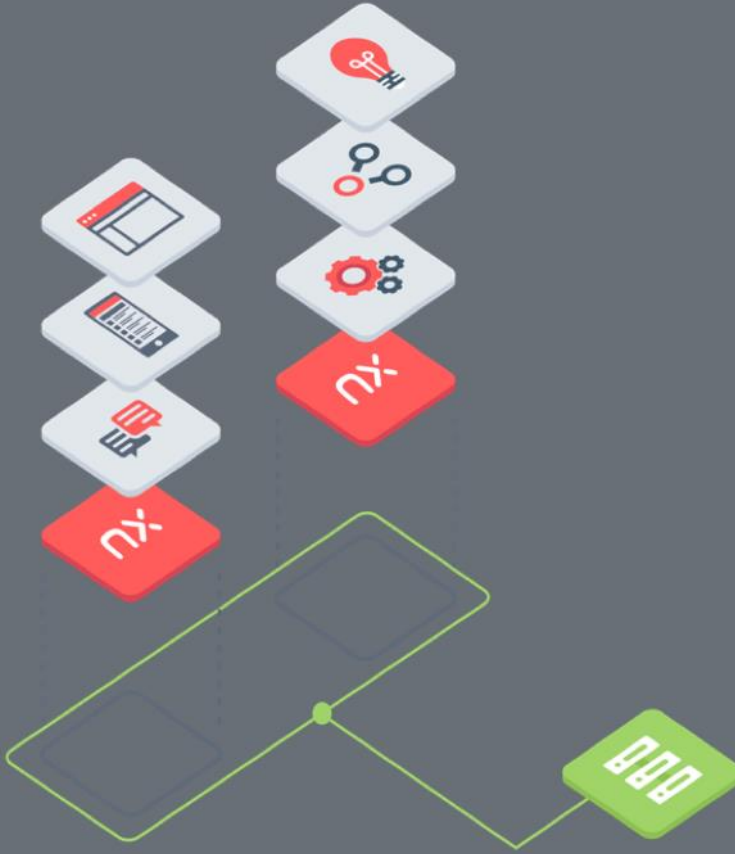
When edits are complete, you should regenerate files and send the waybills to the warehouse for execution

The screenshot displays the 'Scenario 1974' interface. At the top, it shows the scenario name, date (10 Apr), and email (gonzalo@nextail.co). Below this is a 'Status' dropdown menu. To the right, there are three buttons: 'Send waybills' (highlighted with a red box and labeled '2.'), 'Review allocations', and an upward arrow icon. A horizontal bar below contains summary statistics: 'STORES 19', 'PRODUCTS 2', 'SKUS 10', 'TOTAL UNITS 170', and 'TODAY UNITS 170'. To the right of this bar is a 'RESULT FILES' section with two links: 'Regenerate files' (highlighted with a red box and labeled '1.') and 'Download'. Below the 'Send waybills' button, a confirmation dialog is shown, titled 'Please, confirm action'. The dialog contains the text: 'This action will regenerate files and send waybills to the warehouse. Do you want to proceed?' and two buttons: 'CANCEL' and 'SEND'.

**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

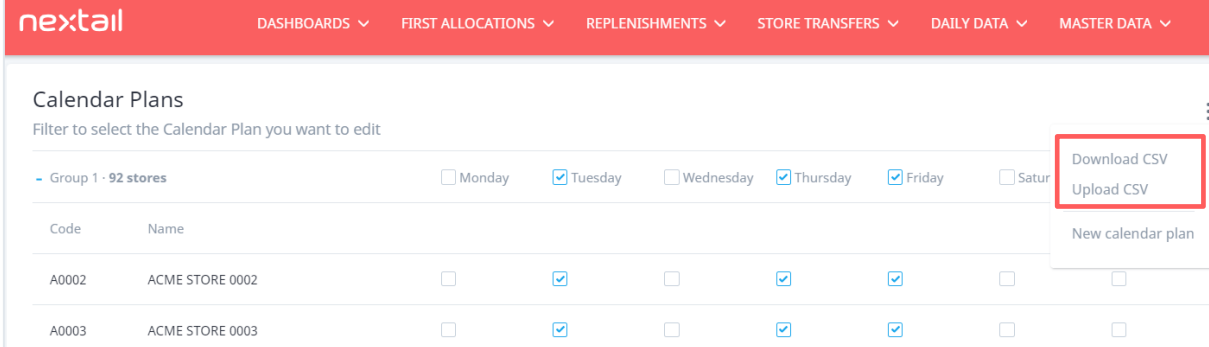
The screenshot shows the Nextail interface. On the left, a navigation menu under 'MASTER DATA' has 'Calendar plans' highlighted with a red box. The main content area is titled 'Calendar Plans' and includes a filter to select a calendar plan. A table lists 14 stores (A0002 to A0014) with columns for days of the week (Monday to Saturday) and checkboxes indicating which days are selected. A red box highlights the day selection row. On the right, a 'Filters' panel shows 'Calendar plan' set to 'Default Plan'.

Code	Name	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
A0002	ACME STORE 0002	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
A0003	ACME STORE 0003	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
A0004	ACME STORE 0004	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
A0005	ACME STORE 0005	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
A0006	ACME STORE 0006	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
A0007	ACME STORE 0007	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
A0008	ACME STORE 0008	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
A0009	ACME STORE 0009	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
A0010	ACME STORE 0010	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
A0011	ACME STORE 0011	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
A0012	ACME STORE 0012	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
A0013	ACME STORE 0013	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
A0014	ACME STORE 0014	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

- 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. 

nextail DASHBOARDS ▾ FIRST ALLOCATIONS ▾ REPLENISHMENTS ▾ STORE TRANSFERS ▾ DAILY DATA ▾ MASTER DATA ▾

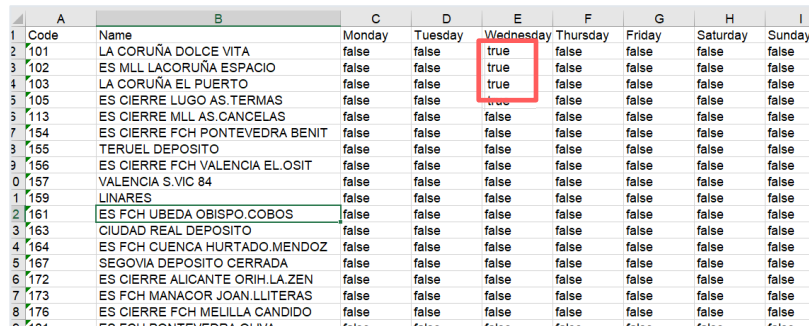
### Calendar Plans

Filter to select the Calendar Plan you want to edit

- Group 1 - 92 stores  Monday  Tuesday  Wednesday  Thursday  Friday  Saturday  Sunday

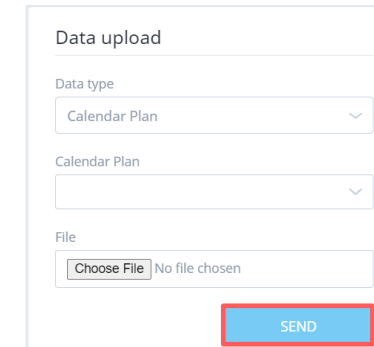
Code	Name	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
A0002	ACME STORE 0002	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A0003	ACME STORE 0003	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2.



	A	B	C	D	E	F	G	H	I
1	Code	Name	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
2	101	LA CORUÑA DOLCE VITA	false	false	true	false	false	false	false
3	102	ES MLL LACORUÑA ESPACIO	false	false	true	false	false	false	false
4	103	LA CORUÑA EL PUERTO	false	false	true	false	false	false	false
5	105	ES CIERRE LUGO AS.TERMAS	false	false	true	false	false	false	false
3	113	ES CIERRE MLL AS.CANCELAS	false	false	false	false	false	false	false
7	154	ES CIERRE FCH PONTEVEDRA BENIT	false	false	false	false	false	false	false
3	155	TERUEL DEPOSITO	false	false	false	false	false	false	false
9	156	ES CIERRE FCH VALENCIA EL.OSIT	false	false	false	false	false	false	false
0	157	VALENCIA S.VIC 84	false	false	false	false	false	false	false
1	159	LINARES	false	false	false	false	false	false	false
2	161	ES FCH UBEDA OBISPO.COBO	false	false	false	false	false	false	false
3	163	CIUDAD REAL DEPOSITO	false	false	false	false	false	false	false
4	164	ES FCH CUENCA HURTADO.MENDOZ	false	false	false	false	false	false	false
5	167	SEGOVIA DEPOSITO CERRADA	false	false	false	false	false	false	false
6	172	ES CIERRE ALICANTE ORIH.LA.ZEN	false	false	false	false	false	false	false
7	173	ES FCH MANACOR JOAN.LLITERAS	false	false	false	false	false	false	false
8	176	ES CIERRE FCH MELLILA CANDIDO	false	false	false	false	false	false	false
8	184	ES CIERRE FCH PONTEVEDRA SUMA	false	false	false	false	false	false	false

3.



Data upload

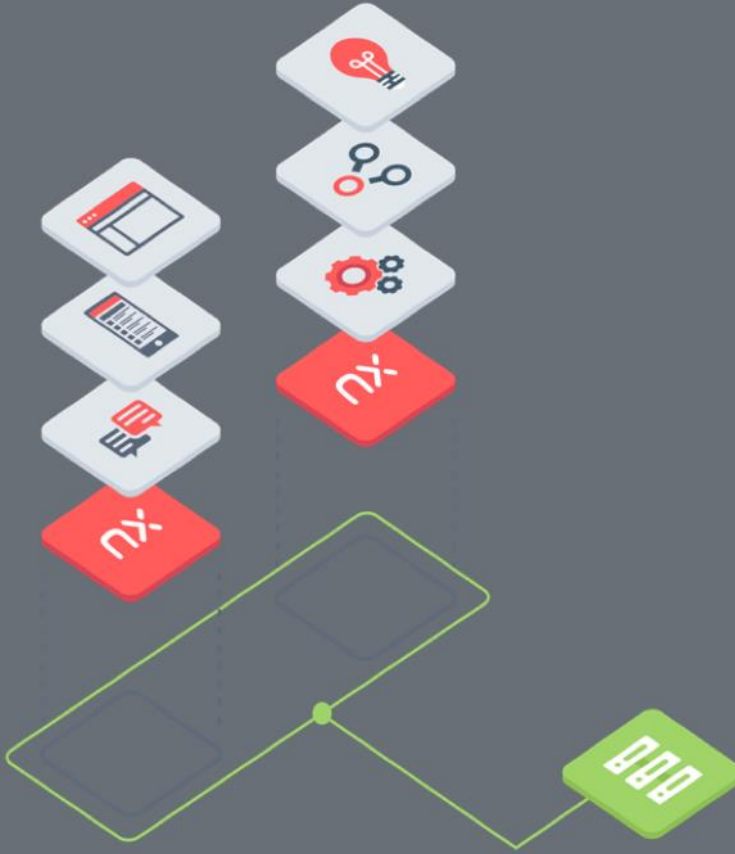
Data type  
Calendar Plan ▾

Calendar Plan  
▾

File  
Choose File No file chosen

SEND

- 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 .xlsx file by clicking on “Upload CSV”









## Content







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

# 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 assortment	✓		
	Other conditions			✓

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

# 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

FORECAST PARAMETERS

Planning horizon	Forecast weeks	
21	3	
<input type="checkbox"/> Planning horizon by store	<input type="checkbox"/> Same weight for all weeks	
Week 1	Week 2	Week 3
25	30	45
<input type="checkbox"/> 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

2

FORECAST PARAMETERS

Planning horizon: 21      Forecast weeks: 3

Planning horizon by store       Same weight for all weeks

Week 1	Week 2	Week 3
25	30	45

3 best sales week

# 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.**

**3**

FORECAST PARAMETERS

Planning horizon:  Forecast weeks:

Planning horizon by store  Same weight for all weeks

Week 1:  Week 2:  Week 3:

3 best sales week

## 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

- Group 1 · 77 stores

Code	Name	<input checked="" type="checkbox"/> Monday	<input type="checkbox"/> Tuesday	<input type="checkbox"/> Wednesday	<input checked="" type="checkbox"/> Thursday	<input checked="" type="checkbox"/> Friday	<input type="checkbox"/> Saturday	<input type="checkbox"/> Sunday
A0002	ACME STORE 0002	<input checked="" type="checkbox"/>	●	■	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A0003	ACME STORE 0003	<input checked="" type="checkbox"/>	●	■	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A0007	ACME STORE 0007	<input type="checkbox"/>	<input checked="" type="checkbox"/>	●	■	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A0008	ACME STORE 0008	<input type="checkbox"/>	<input checked="" type="checkbox"/>	●	■	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

● 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

*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
		<div><p><b>Black Friday 2018 - Stores A</b> </p><p>Period from 20 Nov to 24 Nov, 2018</p><p> 29 stores  327 products</p><hr/><p>2.45 ACTUAL COEFF.</p></div>
		<div><p><b>Black Friday 2018 - Stores B</b> </p><p>Period from 20 Nov to 24 Nov, 2018</p><p> 21 stores  327 products</p><hr/><p>2.68 ACTUAL COEFF.</p></div>
		<div><p><b>Mid Season Sales</b> </p><p>Period from 15 Oct to 07 Nov, 2018</p><p> 150 stores  327 products</p><hr/><p>1.88 ACTUAL COEFF.</p></div>
		<div><p><b>Flash Sales Week 48</b> </p><p>Period from 12 Nov to 18 Nov, 2018</p><p> 21 stores  91 products</p><hr/><p>1.46 ACTUAL COEFF.</p></div>
		<div><p><b>Summer Sales - Stores A</b> </p><p>Period from 01 Jul to 30 Jul, 2018</p><p> 300 stores  467 products</p><hr/><p>1.29 ACTUAL COEFF.</p></div>
		<div><p><b>Web Summer Special</b> </p><p>Period from 01 Jul to 15 Jul, 2018</p><p> 1 stores  224 products</p><hr/><p>1.33 ACTUAL COEFF.</p></div>

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

MASTER DATA ▾

- Products
- Stores
- Categories
- Promotions**
- Master Sections
- Product category items
- Store category items
- Calendar plans
- Visual Merchandiser

### Overview of the promotions

Select the promotions available for your network of stores and products

Affecting any date between  and  Search  by name

ONGOING FUTURE **FINISHED**

**Sales in Barcelona**

Period from 26 Mar to 15 Apr, 2020

91 stores 11 products

---

ACTUAL COEFF.

**Black Friday 50%**

Period from 28 Nov to 30 Nov, 2019

91 stores 11 products

---

ACTUAL COEFF.

**Mid season sales may2019**

Period from 15 May to 31 May, 2019

91 stores 7 products

---

ACTUAL COEFF.

**2**

### 3 Create a new promotion ✕

Promotion name \*

Store Category \*

Product Category \*

From \*  To \*

Similar Promotion

Promotion coefficient \* ⓘ

Promotion features

# Configuring promotions prompts several inputs

Create a new promotion ✕

Promotion name \*

Store Category \*

Product Category \*

From \*  To \*

Similar Promotion

Promotion coefficient \* ⓘ

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.

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

**nextail** DASHBOARDS ▾ BUY (🇸🇦) ▾ FIRST ALLOCATIONS ▾

### Overview of the promotions

Select the promotions available for your network of stores and products

ONGOING **FUTURE** FINISHED

**Promotion\_1**  
Period from 16 Mar to 23 Mar, 2019

🏪 39 stores 📦 1161 products

---

**2.51** **6,975**  
ESTIMATED COEFF. ESTIMATED UNITS SOLD



### Edit Promotion

Promotion name \*  
Promotion\_1

Store Category \*  
Areas

Product Category \*  
Categorization

From \* To \*  
2019-03-16 2019-03-23

Similar Promotion  
Private sales AW17 50% UK

Promotion coefficient \* ⓘ  
2.51

Promotion features  
Private Sales SS19

CANCEL EDIT

## 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

The screenshot illustrates the process of modifying a sales threshold. It is divided into three numbered steps:

- Step 1:** A red box highlights the 'View past executions' option in the 'FIRST ALLOCATIONS' dropdown menu.
- Step 2:** A table titled 'First Allocation Executions' is shown. The first row is highlighted with a red box. The table has columns for Status, Scenario ID, Date, User, Product category, Stores, Products, and Units.
- Step 3:** A detailed view of the selected scenario (Scenario ID 1598) is shown. It features a slider for 'RECALCULATE ALLOCATION (%)' with a red box around the value '15'. Below the slider, 'INITIAL ALLOCATION' is shown as 100.0% STORES (31 OUT OF 31) and 34.2% UNITS (175 OUT OF 511).





**Directly in the platform**

**Demand Forecasting:**

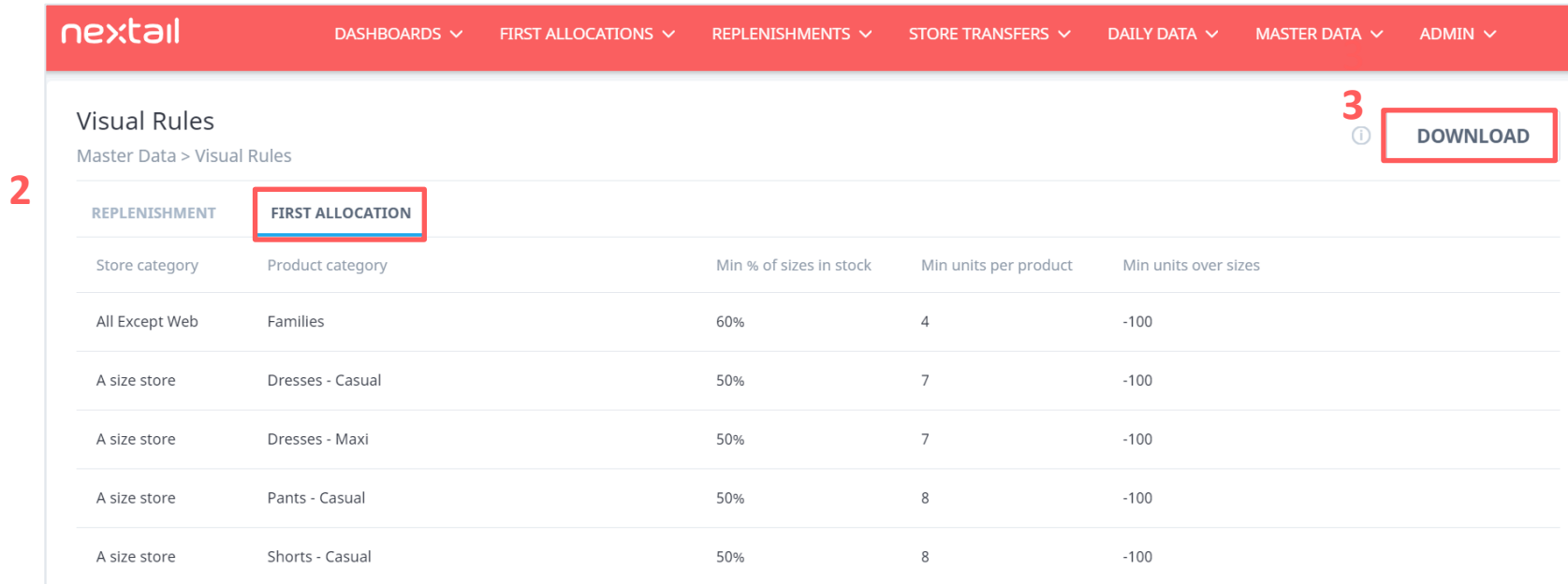
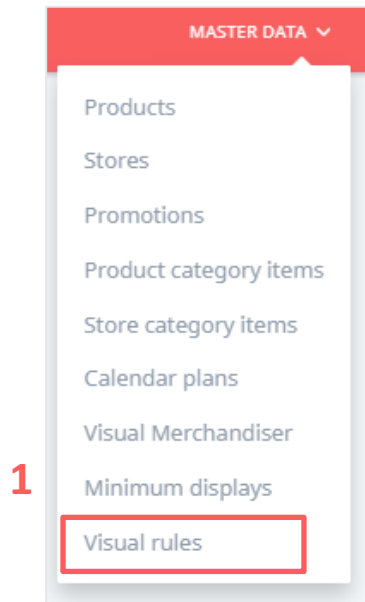
- Previous weeks sales & weights of each week
- Planning Horizons
- Lead times & Calendars
- Promotions

**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



## Directly in the platform

### Demand Forecasting:

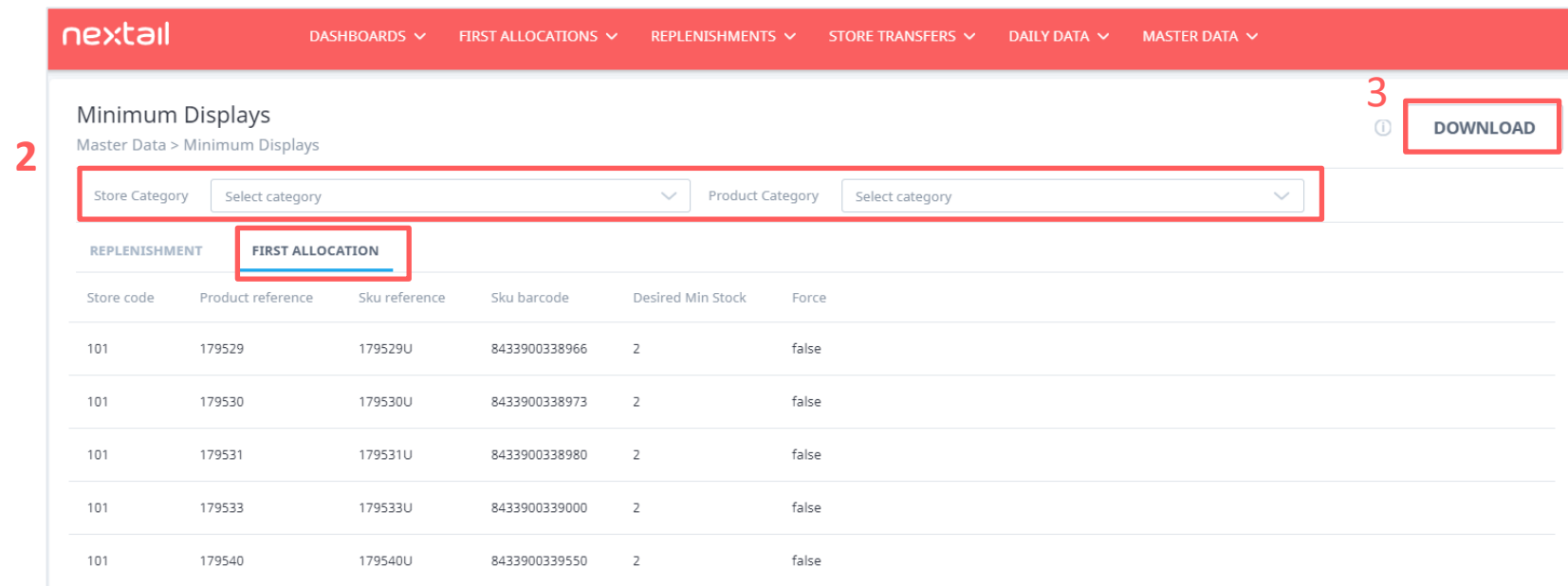
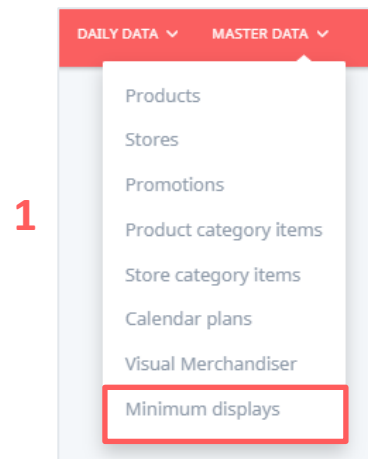
- Previous weeks sales & weights of each week
- Planning Horizons
- Lead times & Calendars
- Promotions

### 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:

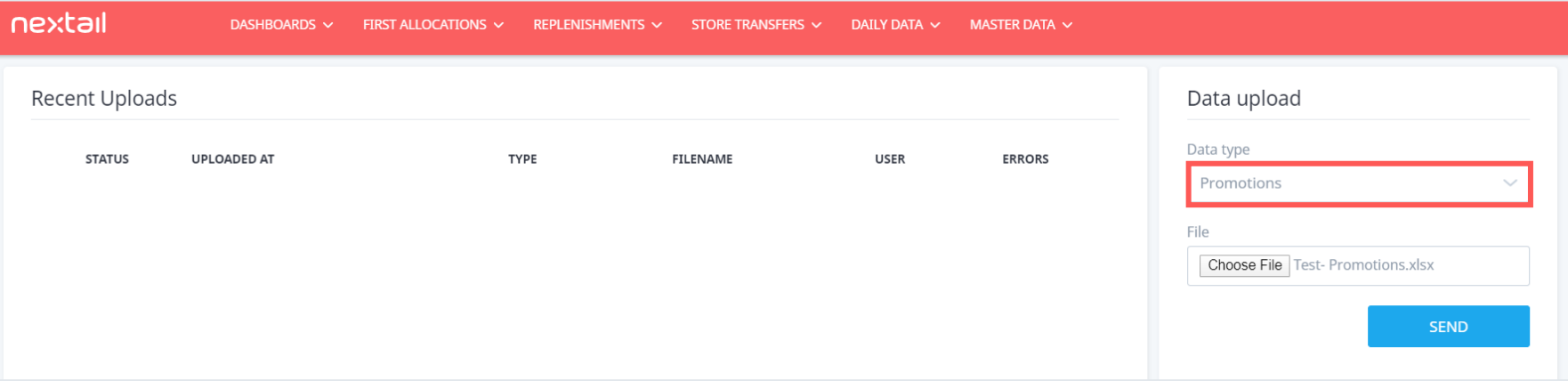
- **Promotions**

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:

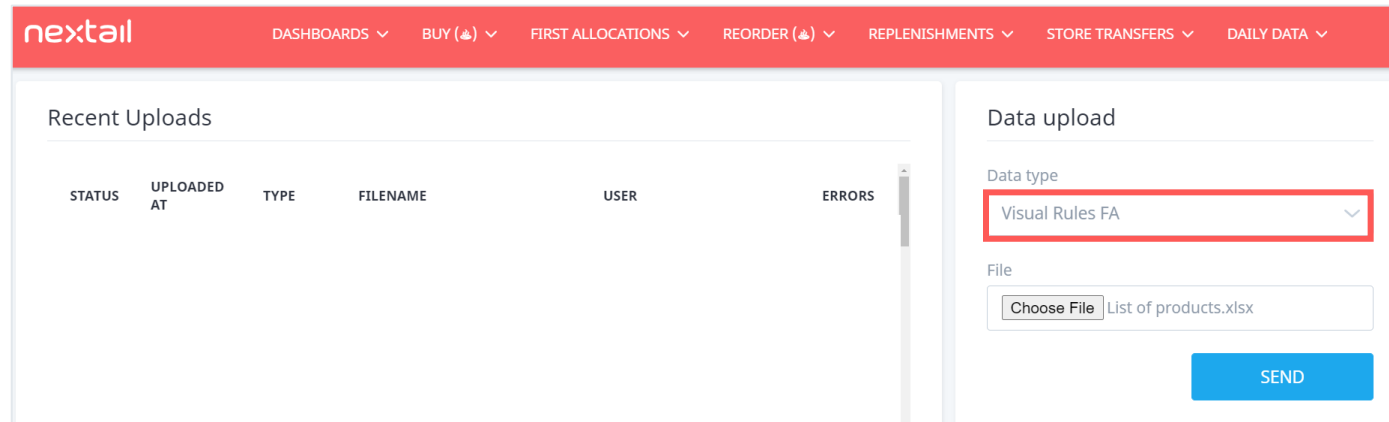
- Promotions

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:

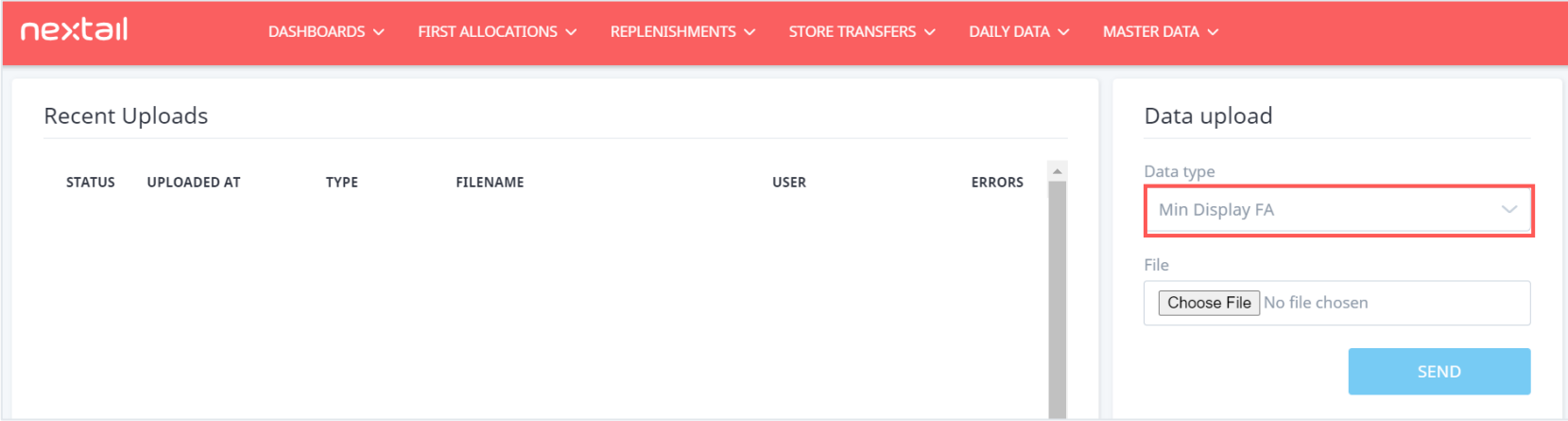
- Promotions

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:

	A	B	C	D	E	F
1	ProductRef	SKURef	SKUBarcode	StoreCode	Desired_Min	Force
2	179529	179529U	8433900338	101	2	0
3	179530	179530U	8433900338	101	2	0
4	179531	179531U	8433900338	101	2	0

- **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 screenshot shows the Nextail interface with a red header bar containing the logo and navigation menu. The main content area is divided into two sections: 'Recent Uploads' and 'Data upload'.

**Recent Uploads Table:**

STATUS	UPLOADED AT	TYPE	FILENAME	USER	ERRORS
● (Yellow)	11 Mar, 17:06:47 (CET)	Modified RO	V_1March.csv	ivan@nextail.co	
● (Red)	11 Mar, 17:00:23 (CET)	Modified RO	V2_19_feb.csv	ivan@nextail.co	
● (Green)	8 Mar, 11:36:03 (CET)	Min Display	V_1March.csv	pedro@nextail.co	24332

**Data upload sidebar:**

Data type

- Modified RO
- Modified RO
- Layout Master
- Warehouse Stock
- Min Display
- Sales Threshold

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- 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:

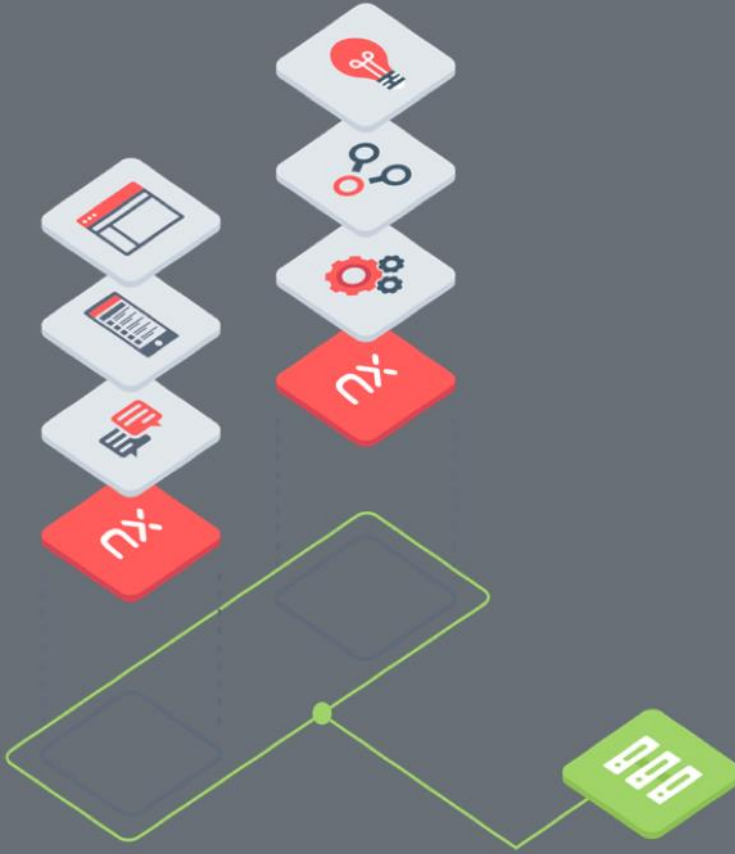
- Comparable products

### 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: <ul style="list-style-type: none"><li>• Max. order</li><li>• Min. order</li><li>• Max. stock</li></ul>	Customized by the customer	At the First Allocation kick off



## Content

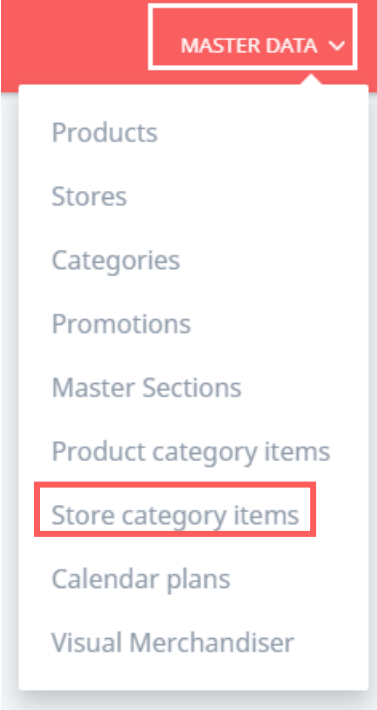
- 1 Category Management
- 2 First Allocation optimisation
- 3 Inputting data into the platform
- 4 **Use cases**
- 5 Next steps

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

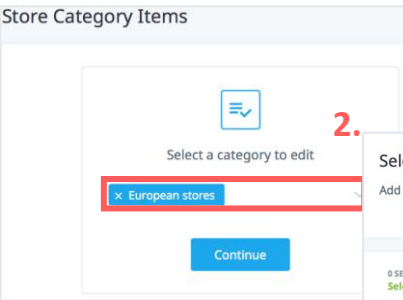
A category creation made by Nextail is needed to assign stores for the new layout.

- 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

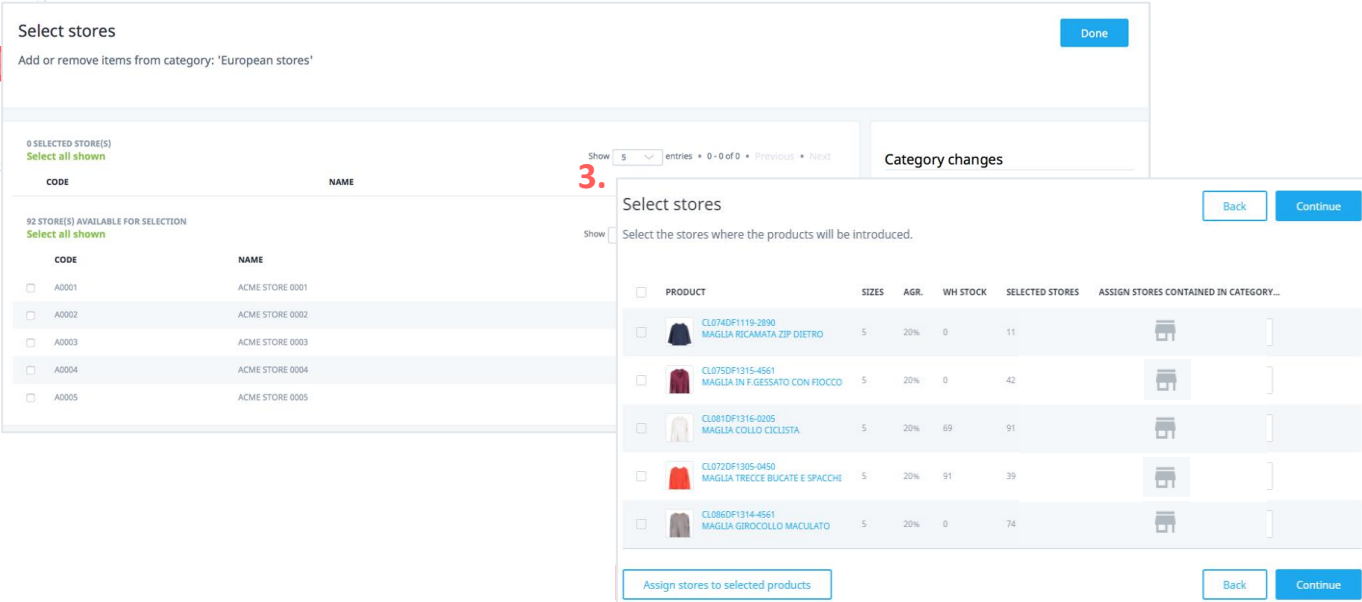
1.



2.



3.



The 'Select stores' dialog box displays a table of stores available for selection:

CODE	NAME
<input type="checkbox"/> A0001	ACME STORE 0001
<input type="checkbox"/> A0002	ACME STORE 0002
<input type="checkbox"/> A0003	ACME STORE 0003
<input type="checkbox"/> A0004	ACME STORE 0004
<input type="checkbox"/> A0005	ACME STORE 0005

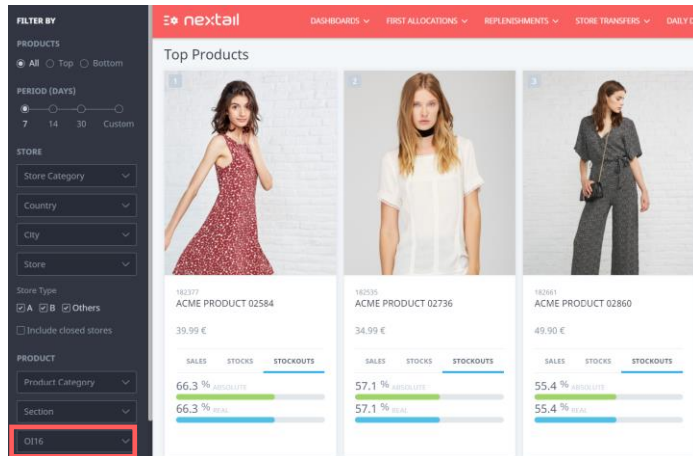
The 'Select stores' dialog box also displays a table of products with store assignment options:

PRODUCT	SIZES	AGR.	WH STOCK	SELECTED STORES	ASSIGN STORES CONTAINED IN CATEGORY...
<input type="checkbox"/> CL074DF1119-2890 MAGLIA RICAMATA ZIP DIETRO	S	20%	0	11	<input type="checkbox"/>
<input type="checkbox"/> CL075DF1315-4561 MAGLIA IN F.GESSATO CON FIOCCO	S	20%	0	42	<input type="checkbox"/>
<input type="checkbox"/> CL081DF1316-0205 MAGLIA COLLO CICLISTA	S	20%	69	91	<input type="checkbox"/>
<input type="checkbox"/> CL072DF1305-0450 MAGLIA TRECCE BUCATE E SPACCHE	S	20%	91	39	<input type="checkbox"/>
<input type="checkbox"/> CL086DF1314-4561 MAGLIA GIROCOLLO MACULATO	S	20%	0	74	<input type="checkbox"/>

# 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.

MASTER DATA

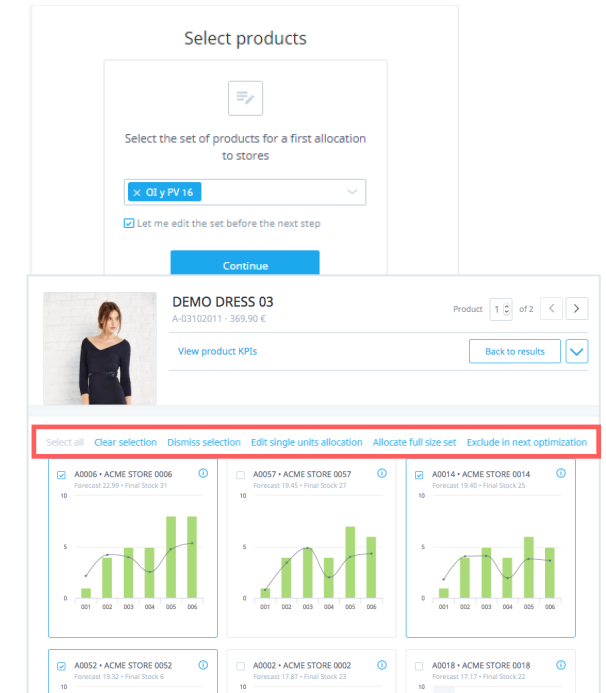
Bulk Category Assign

Product Category: O116

Products: 182377,182535,182661

Submit

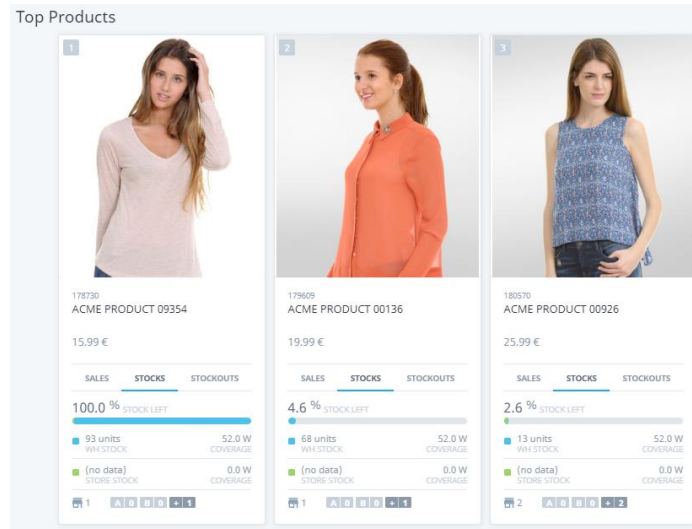
3.





# Allocate available carryover products in warehouse to stores

1.

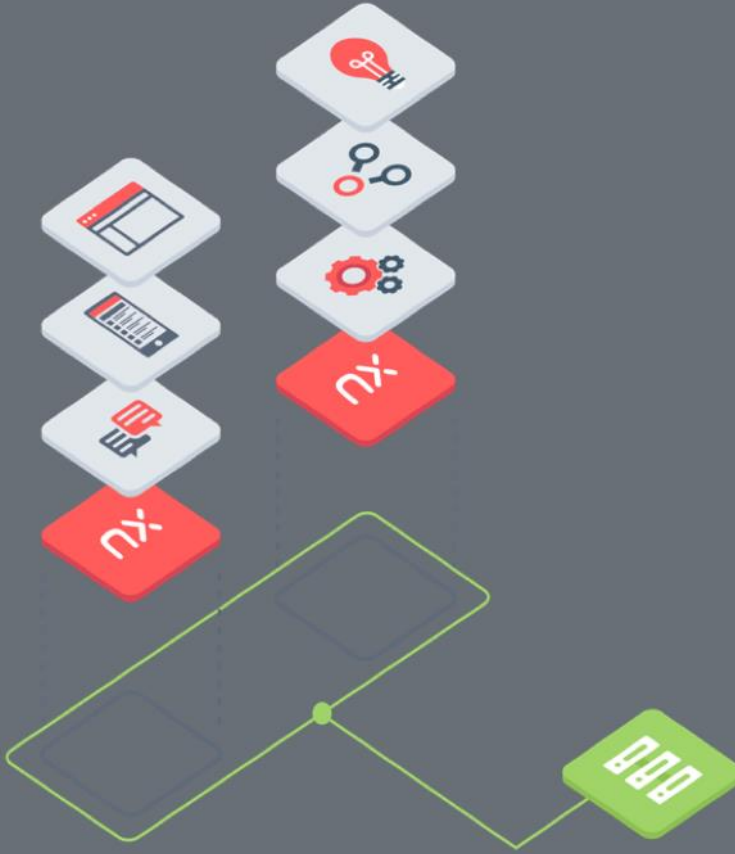


2.

The screenshot shows a 'Bulk Category Assign' form. It features a 'Product Category' dropdown menu with the value 'OI16' selected. Below it is a 'Products' text input field containing the product references '182377,182535,182661'. At the bottom of the form are 'Cancel' and 'Submit' buttons.

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?

- ① Understand how Nextail uses categories to give flexibility on data management by stores & products
- ② Be able to run a First Allocation optimisation
- ③ Review & download results of a First Allocation optimisation
- ④ Feel comfortable inputting some criteria directly within the platform
- ⑤ Feel comfortable uploading criteria into the platform through data files